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CUBES

FAQs

Table of Contents

First Steps:

How do I set up an account?
- You will receive an email with the link to the Cubes website. Follow the link to the main log in page.
- At the bottom of the login panel is an invitation to create an account. Select this option.
- Fill out the information in the registration form and accept the terms of service and click the register button.
- You should receive an account activation email from us within 2 minutes. This email contains a link to activate your account.
  - If you don't see it in your inbox, please check your spam folder.
- Please click the box, or paste the URL into your browser, to complete registration.

How do I add a product?
- Navigate to the License or Report Page.
- Click on the blue plus icon on at the top of your license list.
- Enter information and click Add License.

How do I edit a product?
- Navigate to the License or Report Page.
- Click on the ellipsis located on the right-hand side of the screen.
- Click Edit.
- Edit your license and click Save.

How do I delete an entry?
If you've already saved the license, and need to delete it for any reason:
- Navigate to the license page.
- Find the entry on the table.
- Click on the ellipsis for that entry. Delete is one of the submenu options.

How do I change existing notifications?
- From the drop-down menu underneath your user name, select settings.
- Adjust what day and time you receive these weekly notifications in the Default Alert tile.
- Save and exit.

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How do I upload a spreadsheet?

When you first log in to CUBES, you prompted with the option to upload a spreadsheet. Select that option.
There are two option to upload a spreadsheet--

Use our formatted spreadsheet (available to download from this page):
- Copy your data in the template.
- Click save.
- Upload into to formatted spreadsheet section.
- Your data will appear within 1 minute.

Upload your own spreadsheet:
- Upload your saved spreadsheet.
- Wait 24-48 hours for a notification.
- Your data will then be reflected in the CUBES interface.

How do I apply a filter? What about multiple filter settings?

- Navigate to the License or Report page.
- Select the filter icon on the right-hand side of the screen.
- Apply the desired filters.
- No need to hit enter, the filters will automatically be applied.

How do I sort aphetically/ by term/ by amount?

- To apply a quick-sort on the license table, click the column header you are wishing to sort.
- This applies an alphanumeric sort.

How do I share the reports page?

- This feature is planned for later in 2021.

How do I print the reports page?

- This feature is planned for later in 2021.

How do I look at historical renewals?

- This feature is planned for later in 2021.

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Customize Cubes:

How do I set a custom alert?
- Navigate to the Reports page.
- In the license table, find the entry you want to set an alert for
- Click the ellipsis for that line.
- Select the 'Custom Alert' option from the pop-up menu.
- This opens the custom alert box and you can set alerts and recipients.
- Save and exit.

How do I set up a group notification?
- Navigate to the License or Report page.
- Click the blue bell icon on the top of your license list.
- Select the licenses that for which you want to set an alert.
- Click on the New Alert button.
- Select the notification criteria and click Save.

How do I change my CUBES predefined filters?
- Navigate to the Report Page.
- Select the pencil icon in the top right-hand side of the page.
- Select and drag the CUBES that you want as your custom view.
- The CUBES will be saved to your profile and will appear on the Home Page and Report Page.

License Management

How do I renew with the same terms? What about if the terms are different?
CUBES has various options to renew a license. If the license you are renewing has the same terms, quantity and cost associated with them, then select the Quick Renewal Option:
- Navigate to the License or Report page.
- Click on the ellipsis located on the right-hand side of the screen.
- Click Renew.
- Stay on the Quick Renew tab and click Renew.

Can I write notes for each account?

- Navigate to the License or Report page.
- Click the ellipsis and select Edit.
- Within the License record you can write notes in the Notes section and click save.

Can I view licenses or reports by Department?

- From the Reports page, click on the Filters button. This will open the filter interface.
- Select the department you would like to view from the drop-down menu.
- When a filter is active, you will see a red lightning bolt next to the category that is being filtered.
- Click on any cell to open access more details and options about that license.
- Click on the 3 dots to open the option menu for this license.
- At this time, there is no way to export reports. This feature is planned for later in 2021.

How do I renew past due invoices?

- Click on the cell with the past due notice.
- Select 'Renew' from the dialogue box.
- <u>For Quick Renewal</u>, all you have to do is add the Invoice and PO number and click 'Renew'. The license information is updated.

- <u>To edit renewal information</u>, choose the Edit Renewal tab and easily update any of the active fields.
  - Selecting 'Change' next to Vendor or Account Number opens instructions for how to change that information, which is not editable.
- Click 'Renew' once your information is correct. Your license is now updated.

How do I close out a product? How do I reactivate a closed out a product?

- Navigate to the License or Report page.
- Click the ellipsis on the right-hand side of the screen.
- Click Close.
- Confirm your decision.
- To reopen, simply follow same steps but click Open.

Managing Your Cubes Account

How do I add a new user?
- Access the drop-down menu underneath your username. Select settings.
- In the cube titled 'Users', you can add people by clicking on the **+** icon and entering the required data in the new window.
  - By default, they will user level account.
- Click the Save button, and there you go-- you have a new user on the account.

How do I set up notifications?
All licenses, by default will be included in a rolling 30-day report that will be sent via email, every week. You can choose which day and at what time to receive these reports in Settings.

CUBES also can create custom notifications:
- Navigate to the License or Report page.
- Click the ellipsis and select Custom notification.
- Create the criteria for your notification and Save.
- Once saved a red bell icon will appear next to your license product.

How do I change the fiscal year?
- This feature is planned for later in 2021.

How do I change the first day of the fiscal year?
- This feature is planned for later in 2021.

How do I allow admin permissions to my colleagues?
CUBES allows you to give multiple levels of access to the account. The two high-level settings are User and Admin. Admin has the highest level of access and gives this user complete rights over all features. User permissions gives the user access to all licenses but cannot delete a license or change settings.

Admin are also able to give role level access to User profiles so they can gain permissions to a subset of the licenses.

- Navigate to settings.
- Select the user for whom you want to change permissions.
- Under Department Access select the department(s) that are relevant (up to 4).
- Click Save.

How do I change an account name?
- Navigate to Settings.
- Change the Name of Organization and any other information and click Save.

Can I export to expense reports?
This feature is planned for later in 2021.

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