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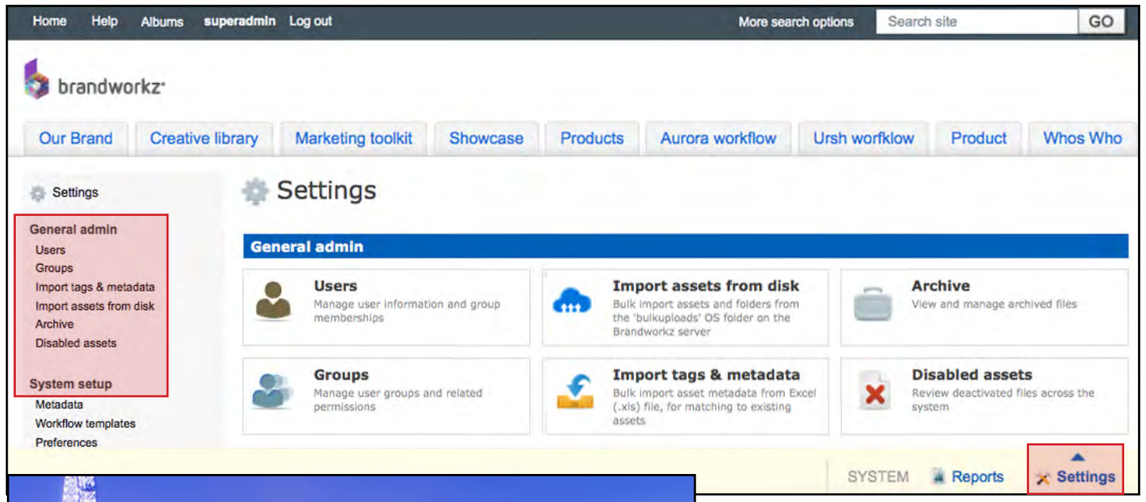
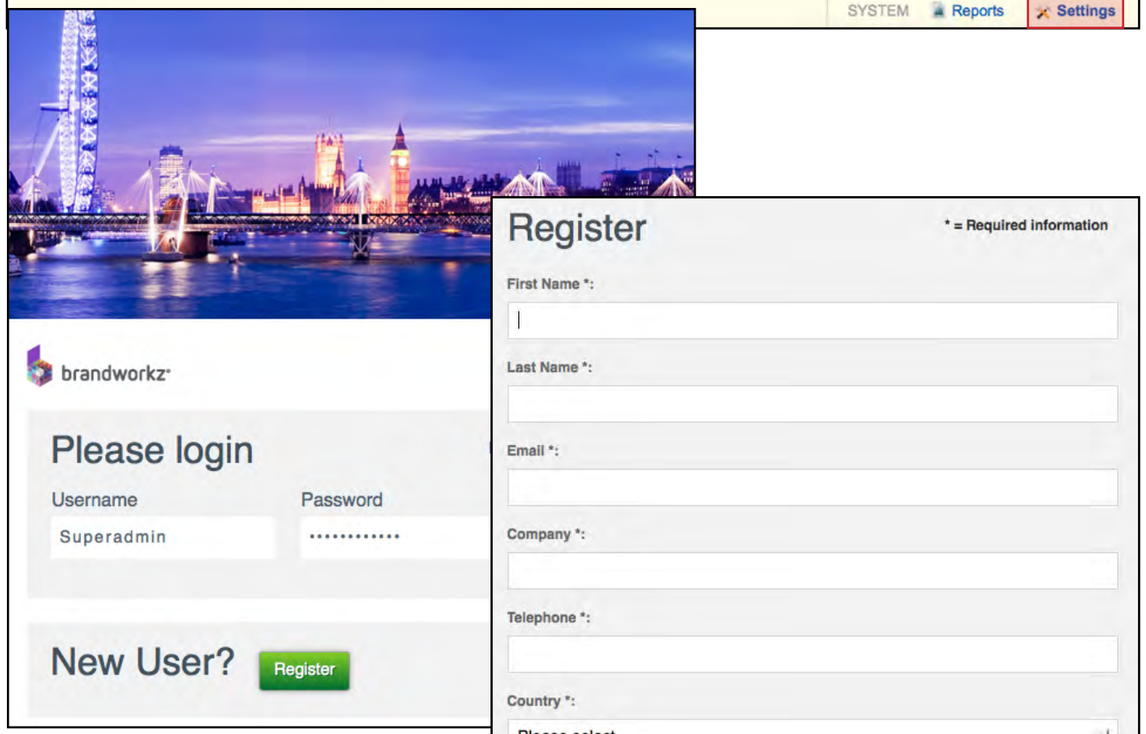
System Admin Training Materials

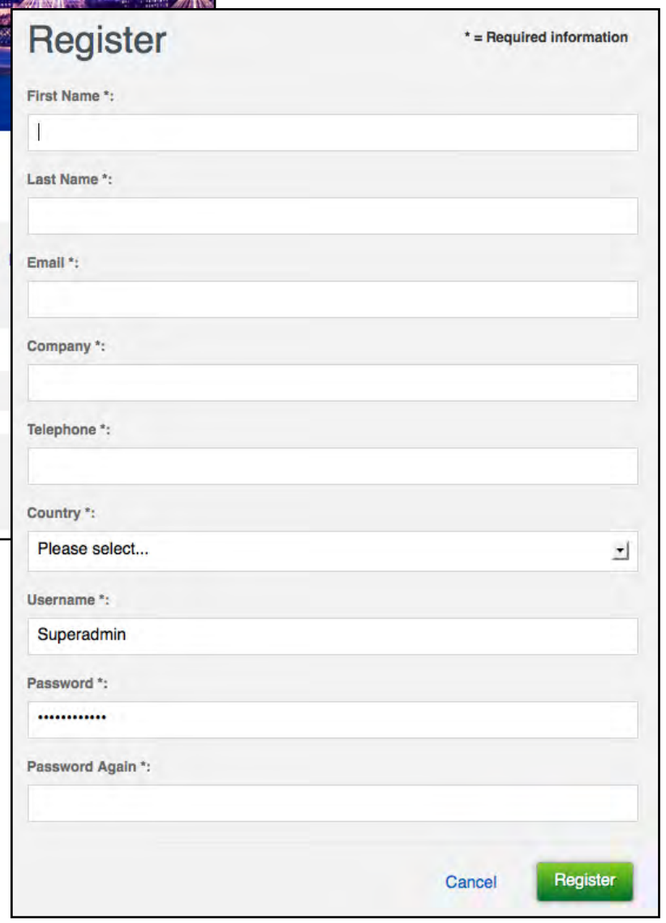
Chapter 7: General System Admin

The SysAdmin can manager Users, Groups, Workflows, Tags and Metadata, Permissions and more from the back end of the site.

This chapter would be used by all users who are responsible for creation and maintenance of the site







General System Admin

The General System Administration area is accessed by clicking on Settings located in the bottom admin bar. Here you will be able to manage users, groups and their permissions. You can also administer disabled assets, create root folders and import tags and metadata which you exported previously.

Setting up new users

If a new user registers by submitting the registration form on your site they will receive an email telling them they will be notified once the account is activated.

The system administrator will also receive an email detailing the information the user has provided along with a link to take you to the user activation page

The fields shown on the registration form will depend on the metadata you have set in the registration forms Metaset

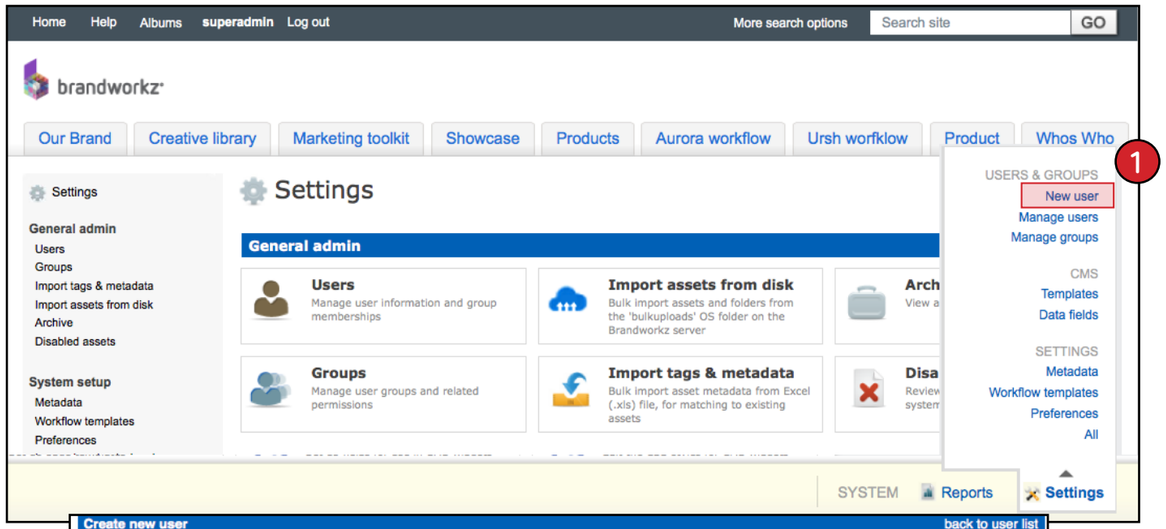
Notes on Registration screen:

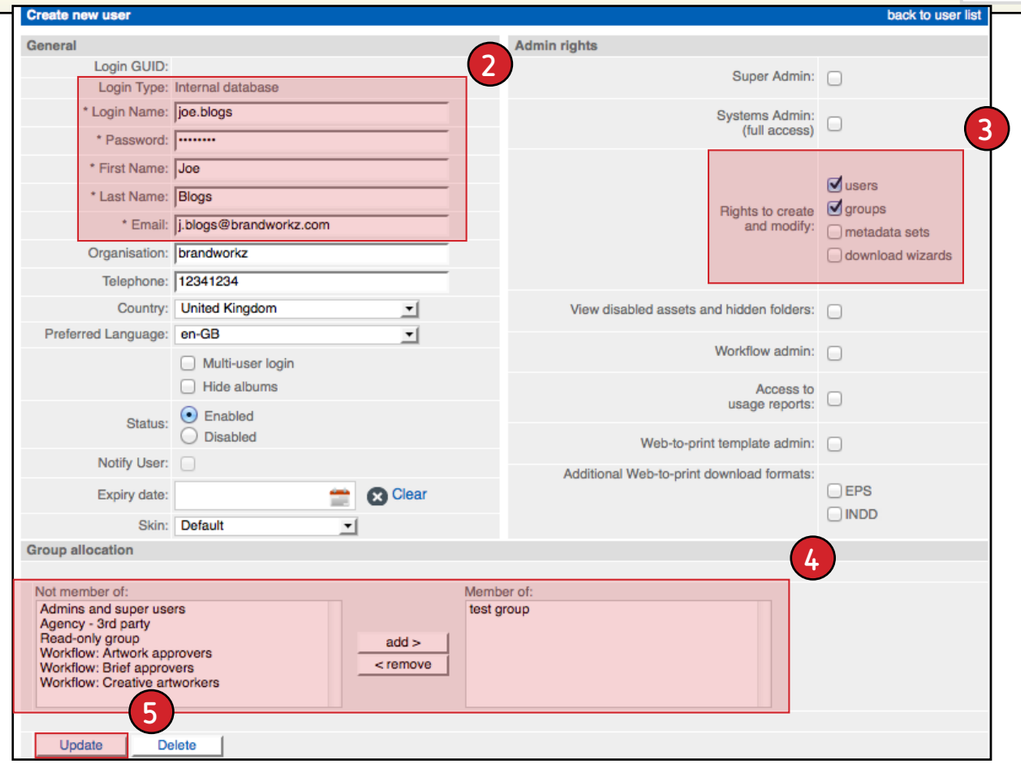
General: Here you can amend their personal details if necessary and add an expiry date to their login.

When you are happy with the General information you need to add the new user to a pre-existing group. Select a group from the not a member group box on the right by clicking on the name of the group and then click add to make it appear in the member of box on the right.
Please note: All users must belong to at least one group.

Even though you have placed the user in a standard group type you may wish for them to have access to some admin permissions. You can add these to the individual user by ticking the relevant boxes in the admin panel on the right.

Once you are happy with the user set up click submit and notify to be taken to the page where you can send an email notifying the user they have been activated

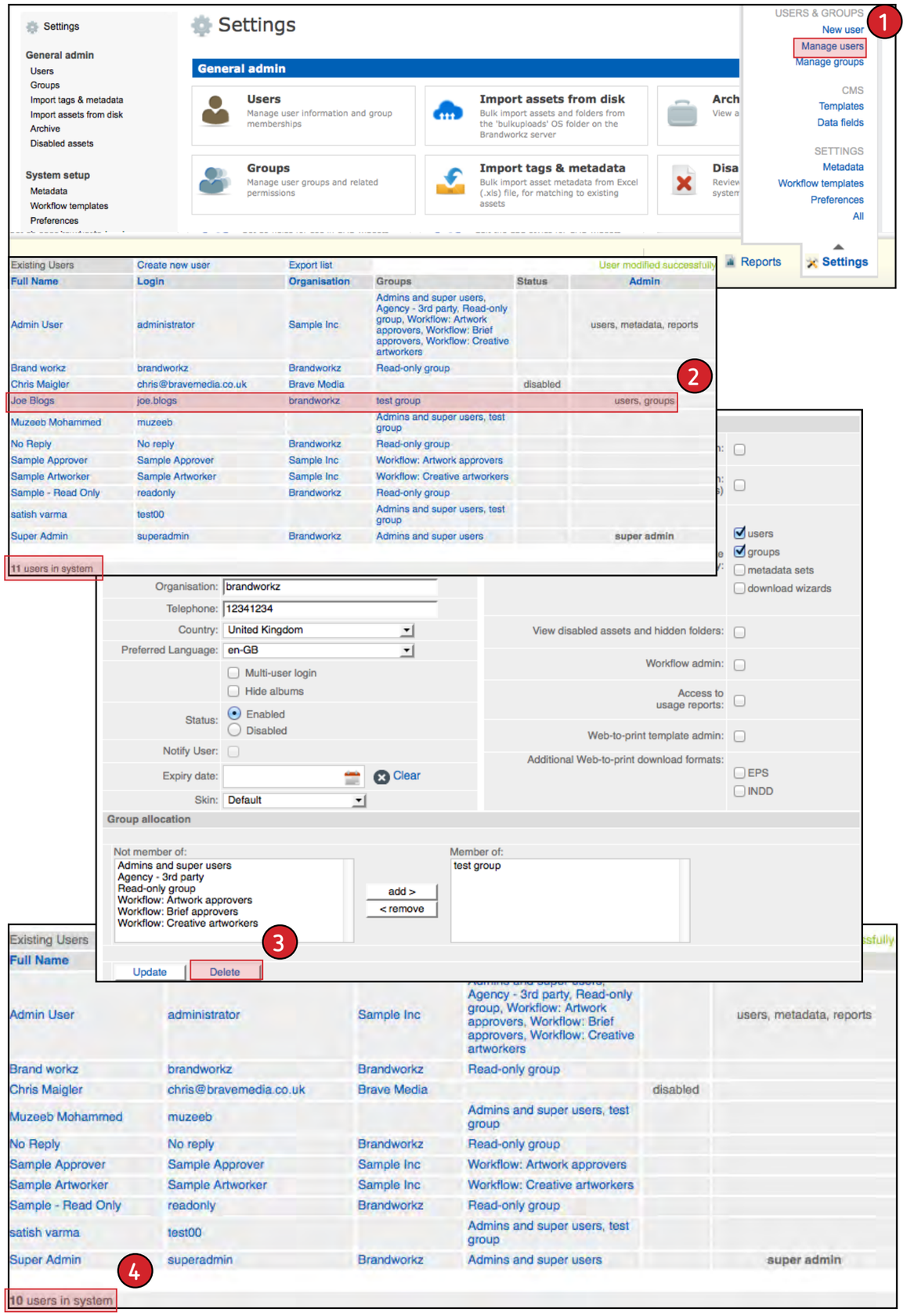




As well as enabling users who have registered via the form, you can also add a new user directly to the system by going into manage users. Please note: Only users with admin rights to users can administrate users. No user can create/modify a user to have more permission then they have.

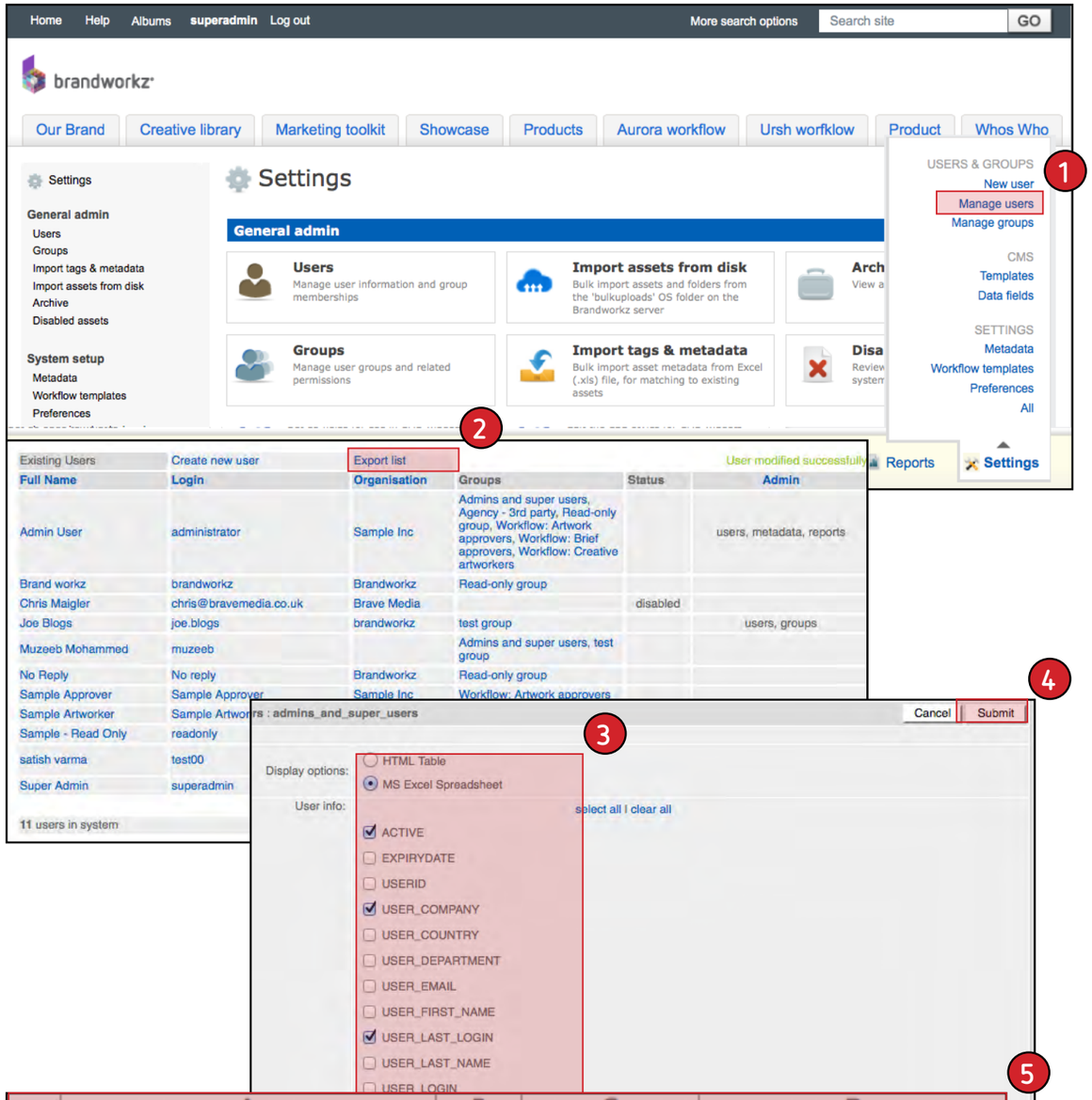
Exercise – Create User

1. Hover over settings in the bottom admin bar and then click on new user from the pop up menu.
2. Fill in mandatory details, those marked with an asterisk.
3. Assign the following admin rights to the user: rights to create and modify users and groups.
4. Allocate the user to a group by selecting a group in the left hand column and clicking add. The groups to which the user is a member will appear in the right hand column. All users must belong to at least one group.
5. Click ‘Update’.
6. Navigate back to list of users & observe user has been created.



Exercise –
Delete User

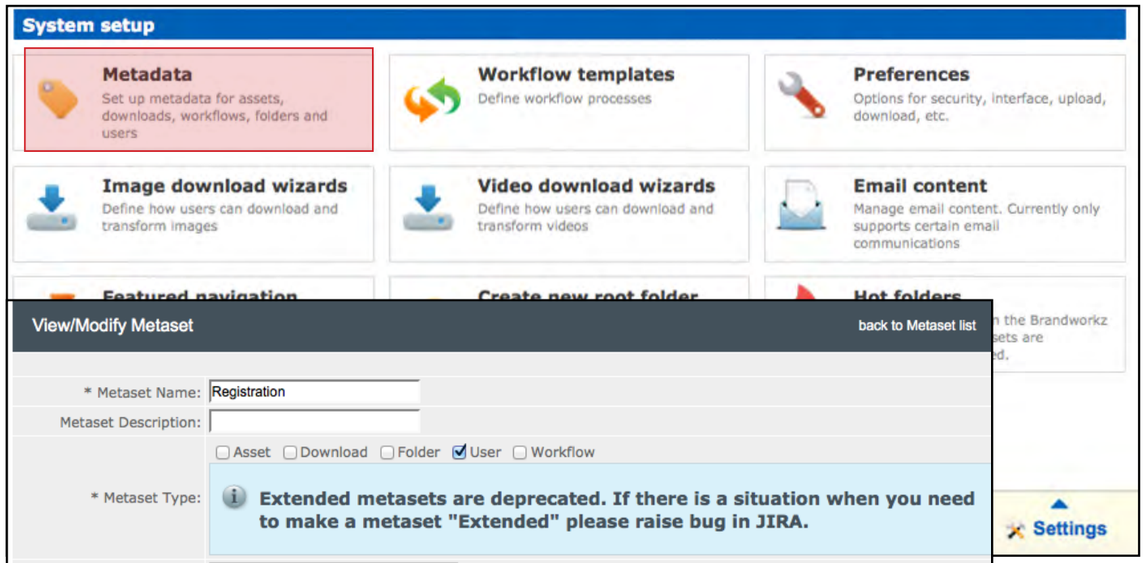
1. Hover over settings in the bottom admin bar and then click on manage users from the pop up.
2. Select the user created in previous exercise.
3. Click on ‘delete’.
4. Navigate back to list of users & observe that the user has been deleted.

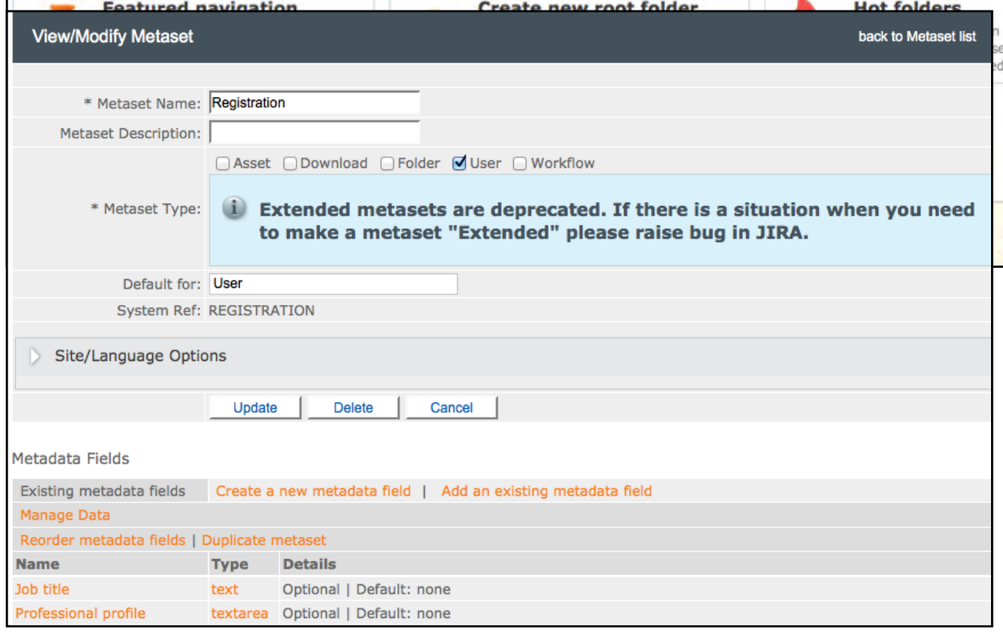


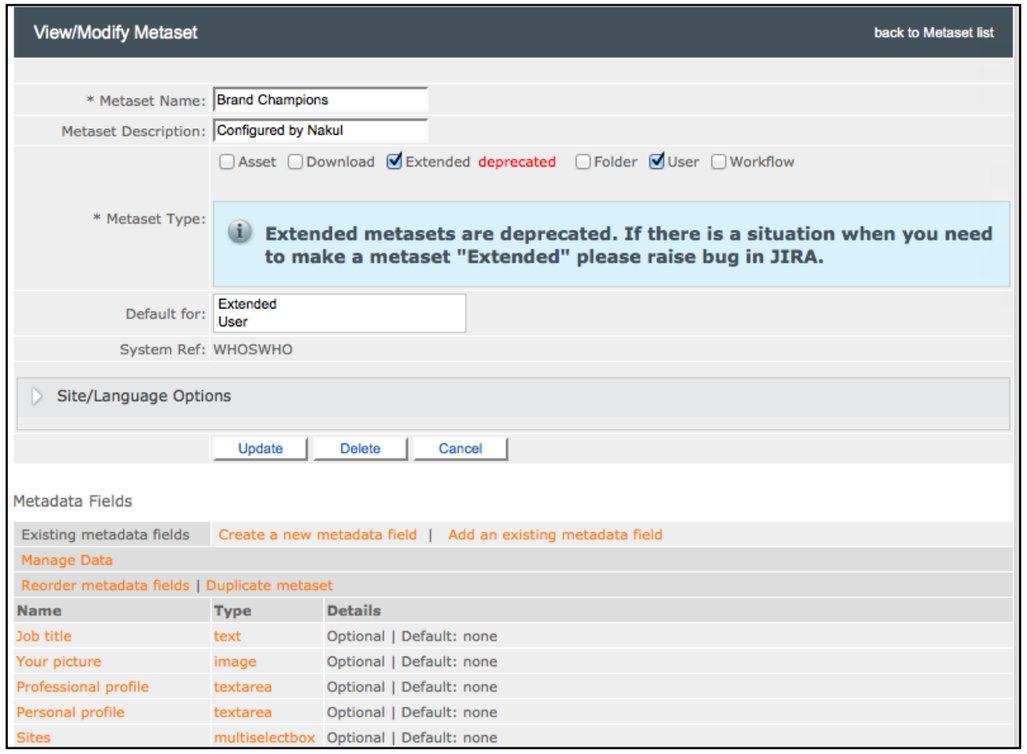
	A	B	C	D
1	GROUP_NAME	ACTIVE	USER_COMPANY	USER_LAST_LOGIN
2	Admins and super users	1	Brandworkz	February, 20 2014 14:09:10
3	Admins and super users, Agency - 3rd party, Read-only group, Workflow: Artwork approvers, Workflow: Brief approvers, Workflow: Creative artworkers	1	Sample Inc	June, 22 2012 16:08:14
4	Admins and super users, test group	1		February, 21 2014 09:58:00
5	Admins and super users, test group	1		February, 21 2014 11:34:56
6	Read-only group	1	Brandworkz	June, 18 2012 19:37:06
7	Read-only group	1	Brandworkz	
8	Read-only group	1	Brandworkz	October, 20 2013 13:42:01
9	Workflow: Artwork approvers	1	Sample Inc	August, 20 2013 17:48:32
10	Workflow: Creative artworkers	1	Sample Inc	July, 10 2013 12:35:50

Exercise –
Export List of Users

1. Hover over settings in the bottom admin bar and then click on manage users form the pop up.
2. Click on ‘Export list’.
3. From the export users page choose if you want to export as an Excel spreadsheet or as HTML. Check the boxes for the information you wish to export.
4. Click ‘Submit’.
5. Find the downloaded document on your computer. Open & review details.







Users' Metasets for Registration and Who's Who

Further explanation on 'metasets' can be found within the 'Metadata' section of this manual, however, this is being added here because it relates to users profiles containing a metaset and also the metaset associated with the registration form.

New Users Registering

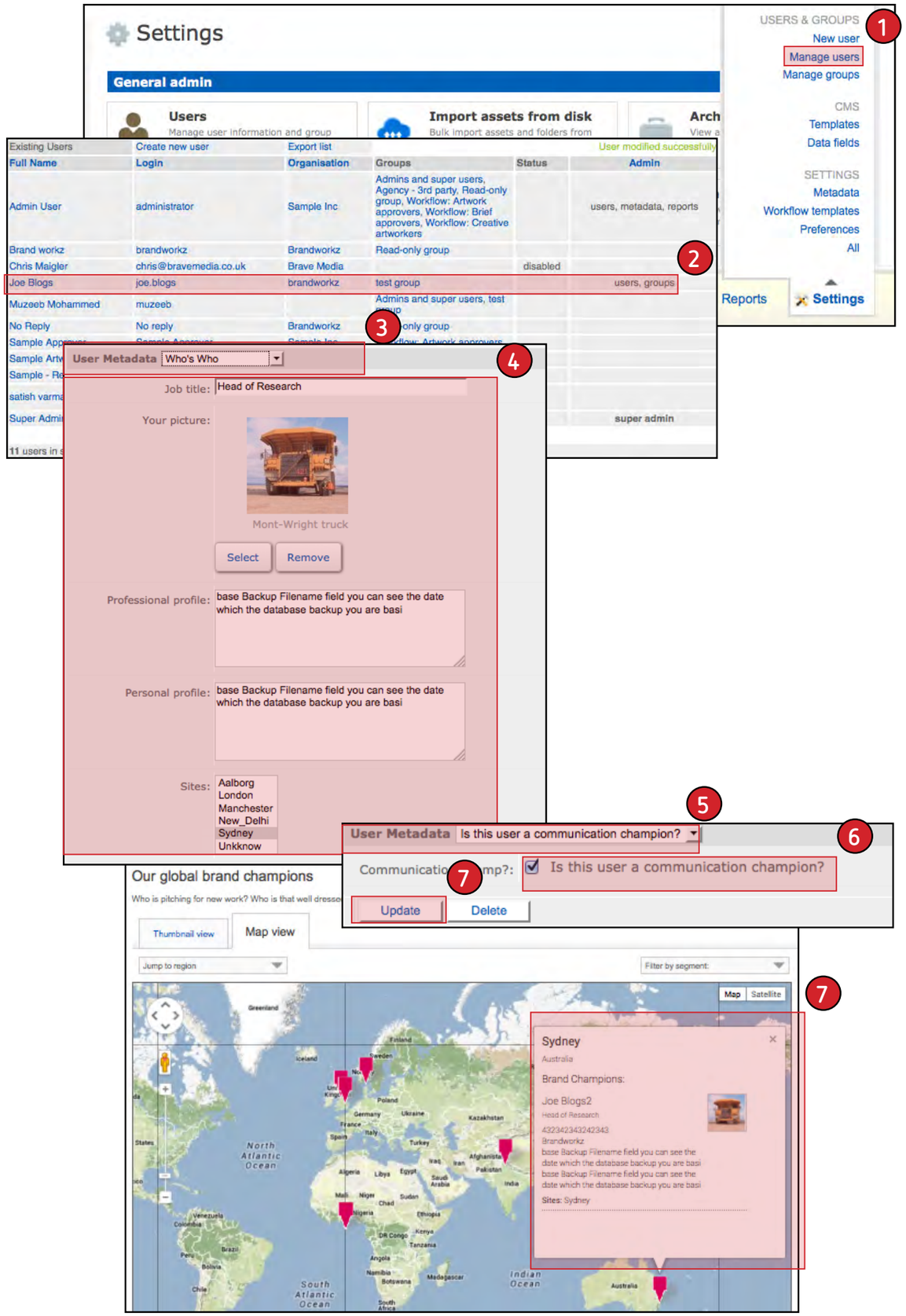
The System Administrator can control the data on the registration form via the 'registration form' metaset. This can be found within the 'metadata' section of the site, navigate to 'registration form' to add or amend fields as required.

Who's Who Users

This is a customised section giving information about a user. In order to customise this section a metaset needs to be applied to the user (see Metasets below for details on how to create a metaset).

An example of why someone might want the information on a user to be customised could simply be that more information about a person is needed, more than can be asked on a 'general user' page.

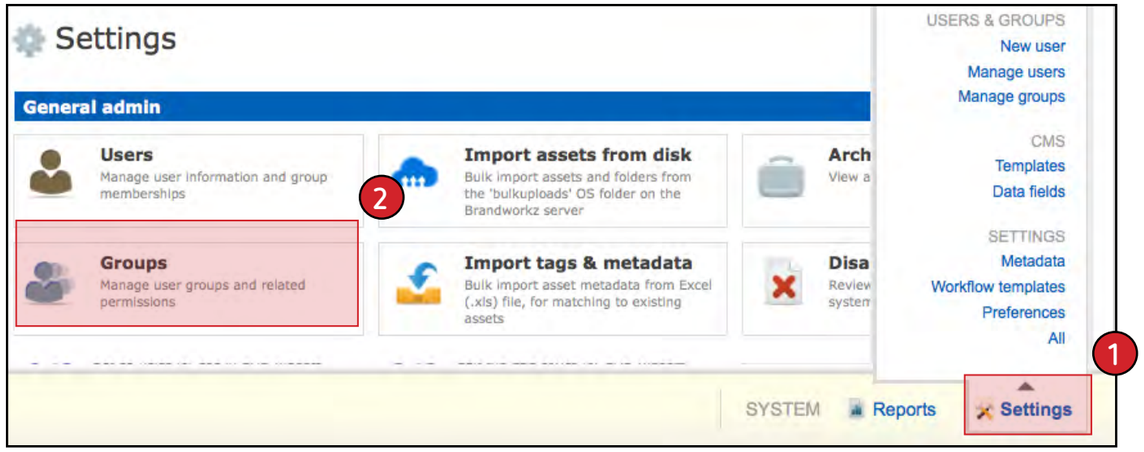
Once the metaset has been created it will automatically appear in the user's profile on the drop down list and you can choose to populate the relevant metaset.

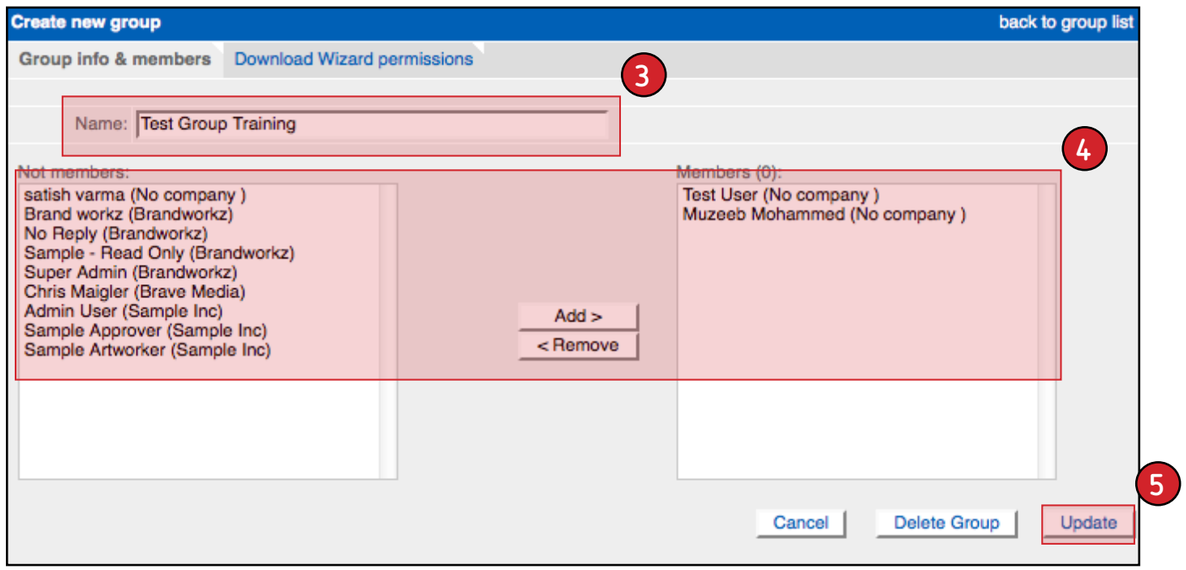


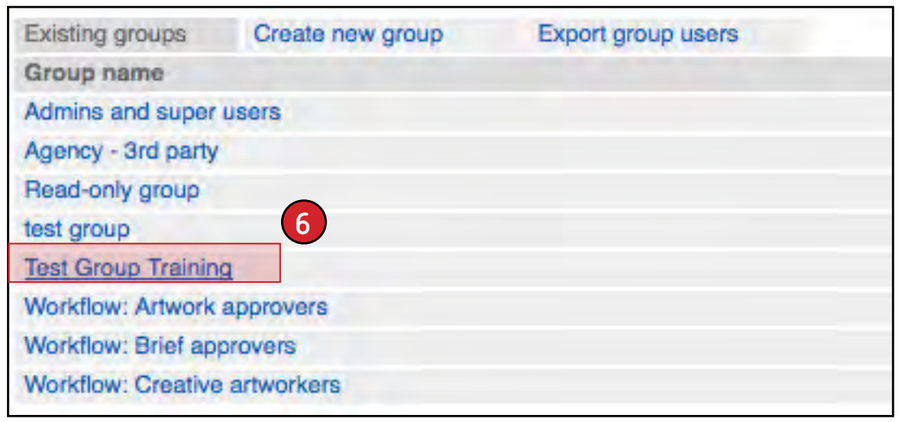
Outputting a user in the 'Who's Who' section

Exercise –
Add a user to the 'Who's Who' map

1. Click on the 'Manage users' link in the 'Settings' actionbar at the bottom of the page.
2. Navigate to the user you wish to assign metadata to.
3. In the 'User metadata' drop down select the 'Brand champion' metaset.
4. Fill in the relevant details and select the relevant office location the user should be assigned to from the list of sites.
5. In the 'User metadata' drop down select 'Is this user a Communication Champion'. Skip this set if client has only one metaset.
6. Select the 'Communication Champion' check box.
7. Click 'update'.
8. Navigate to the map in the Who's Who folder and confirm user details are displayed when you hover over his location.







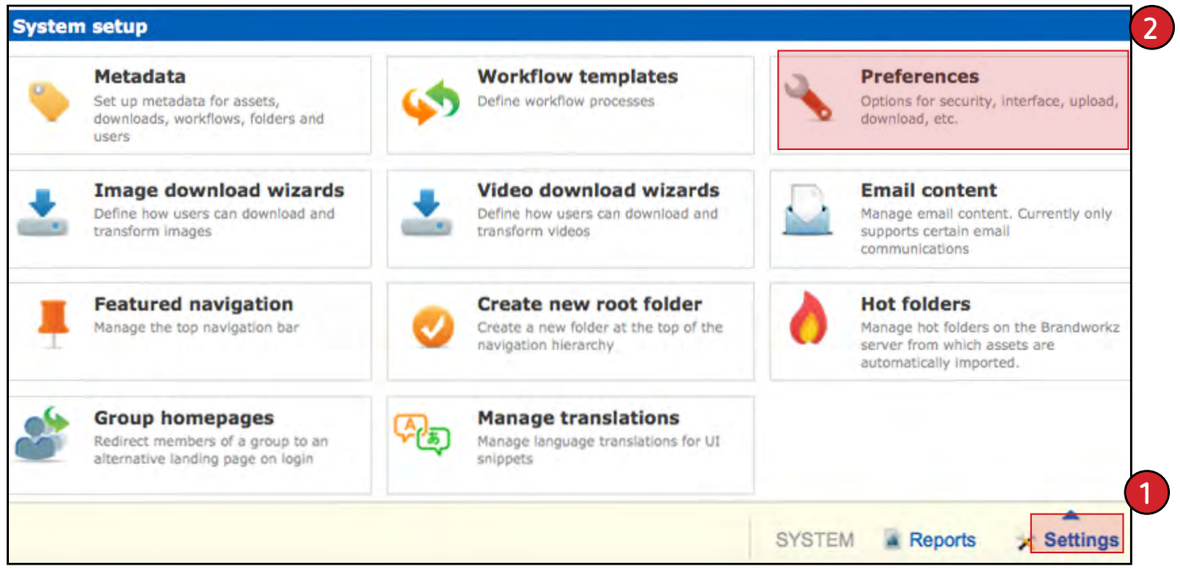
Groups

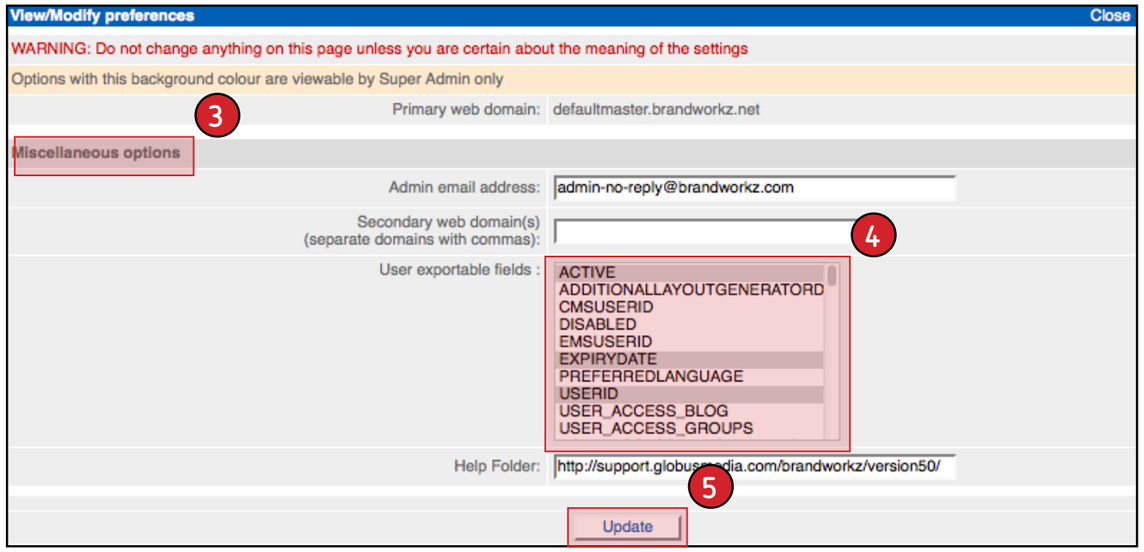
Groups are where you set the permissions for your users. This includes what folders users have access to as well what functionality. As an Super administrator you can create or amend groups as well as add and remove users

All users of the portal will need to belong to at least one group. It is worth taking time thinking about who will need access to the portal and what they will need to do and then set up your groups accordingly. If a user is having issues using the portal such as viewing or downloading the first thing to check is that the group(s) they belong to have those permissions.

Exercise –
Create a new group

1. Click on the ‘Settings’ link in the admin bar at the bottom of the page.
2. Click on Groups > Create New Group.
3. Give the group a name.
4. Add members by selecting a user in the left hand column and clicking the add button. Users in the group appear in the right hand column.
5. Click ‘Update’.
6. Navigate back to list of groups & observe group has been created.





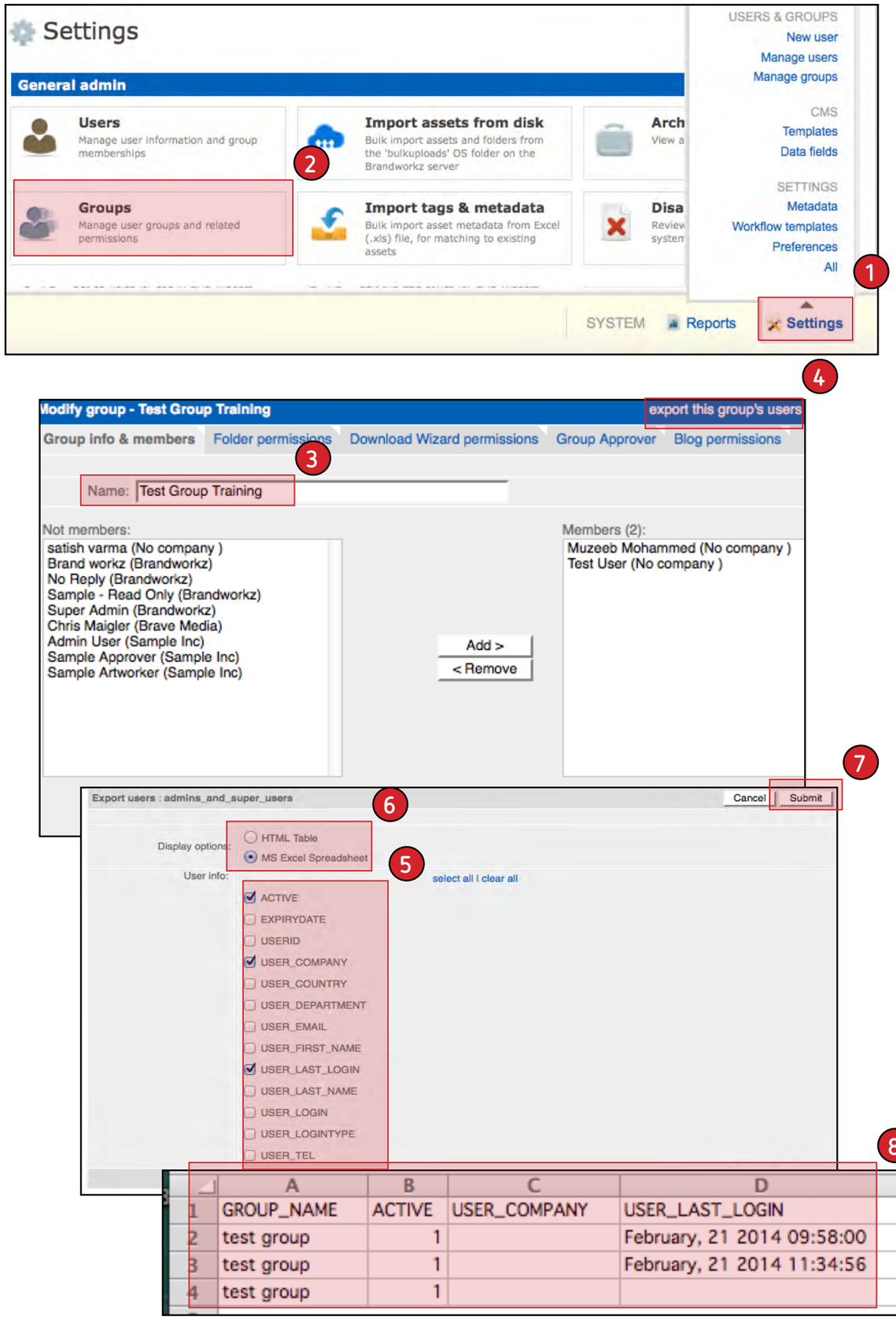
Exporting user group information

Your portal allows Systems Administrators or Admin users to export certain details about people using the system. Either by the entire list of users, or a group of users.

First you need to set the user details you'd like export.

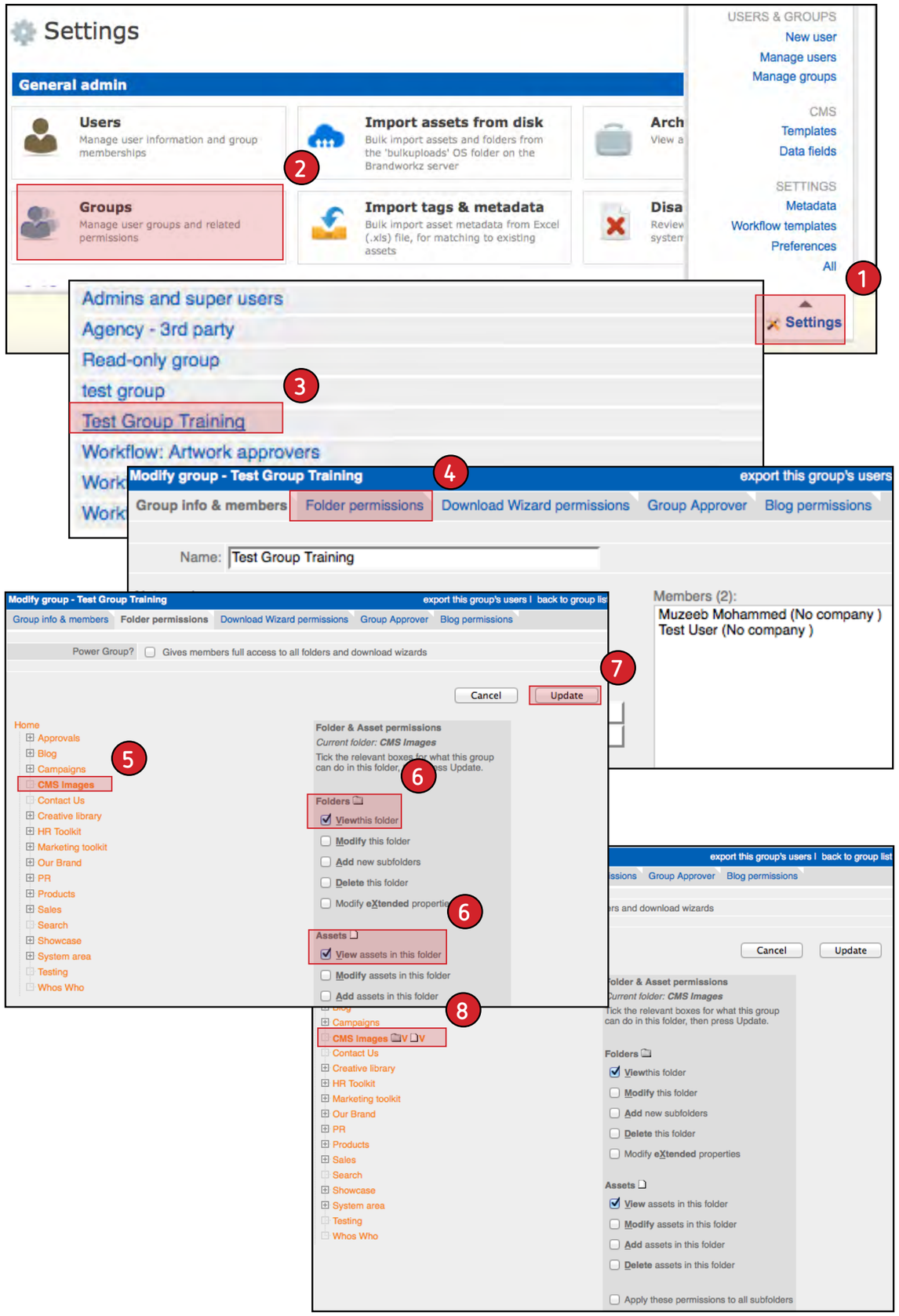
Exercise –
Set the user export list criteria .

1. Click on 'Settings' in the admin bar at the bottom of the page.
2. From the system admin page click on 'Preferences'.
3. Scroll down to the 'Miscellaneous section'.
4. Within the 'user exportable fields' select as appropriate. To select more then one option you need to press shift and click.
5. Scroll down to bottom of page, click 'update'.



Exercise –
Export user group information

1. Click on the ‘Settings’ link in the admin bar at the bottom of the page.
2. Click on ‘Groups’.
3. Click on the name of the group whose information you’d like to export.
4. Click on ‘export this group’s users’.
5. The current list of information to export is shown. Tick/untick which information you need. If the information you require is not in the list see the previous page on how to add criteria to the list.
6. Choose either ‘HTML’ or ‘Excel Spreadsheet’.
7. Click ‘Submit’.
8. A list of user details will appear in a new window or as a downloaded Excel document.



Folder Permissions – Controlled via Groups

The easiest way to manage your users is via groups. When you create a group you allocate which folders and functionality that group will have access to.

Note: Regarding permissions, you need to make sure of these two things:

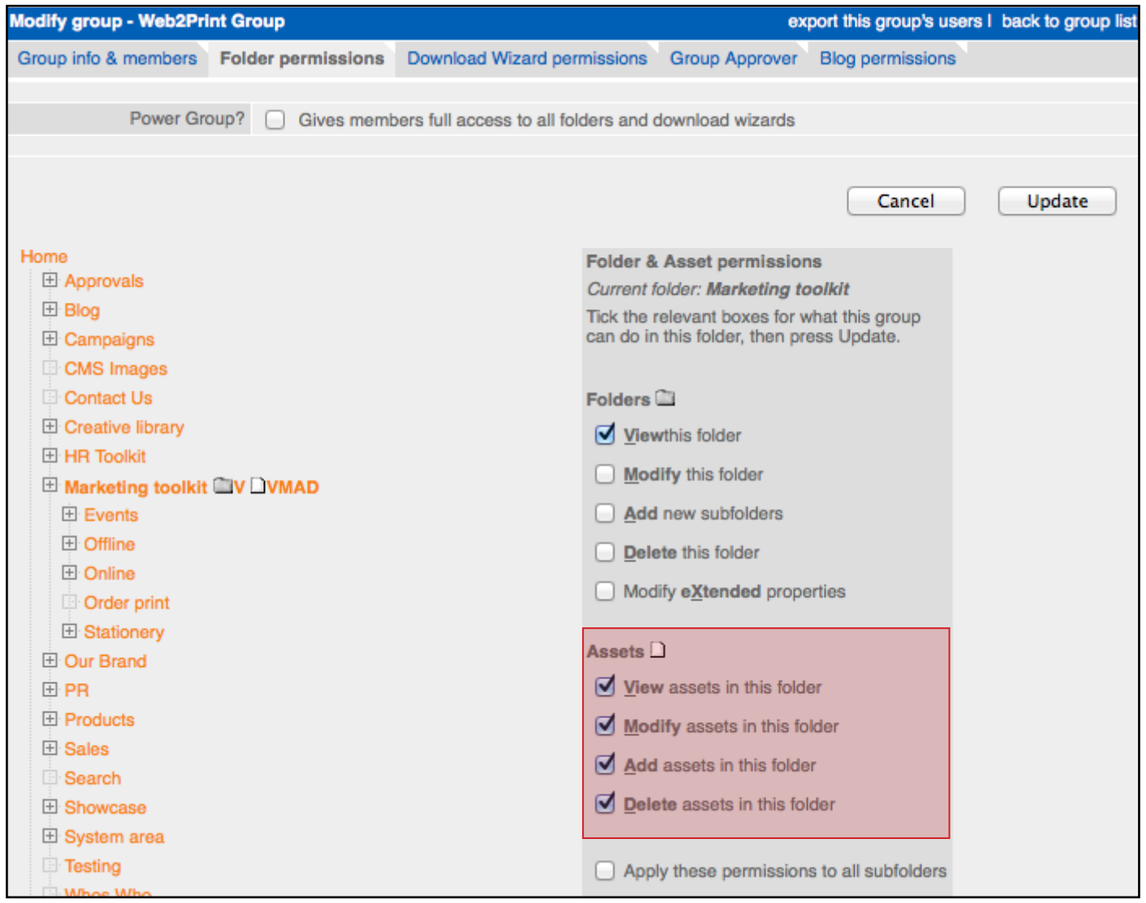
1. Users who need to add/import or export metadata need to be able to modify the folder/ asset where the metadata is.

2. Do NOT give permission to view the 'System Area' folder because this is designed to be visible only to Systems Administrators.

Exercise –
Give 'view folder' and 'view assets' folder permissions to a group

1. Click on 'Settings' link in the bottom admin bar.
2. Click on 'Groups'.
3. Select the group you created in the earlier exercise.
4. Click on the 'Folder permissions' tab.
5. Select a folder from the list on the left by clicking on it.
6. Select the checkboxes for both 'View this folder' and 'View assets in this folder'.
7. Click 'update'.
8. Log on as a user from that group and check you can view the folder and the assets inside.

Please Note: If you have a search page you need to ensure that you give groups permission to view this page or they will not be able to use the search function



Folder Permissions –
Web to Print (creating artwork using dynamic templates)

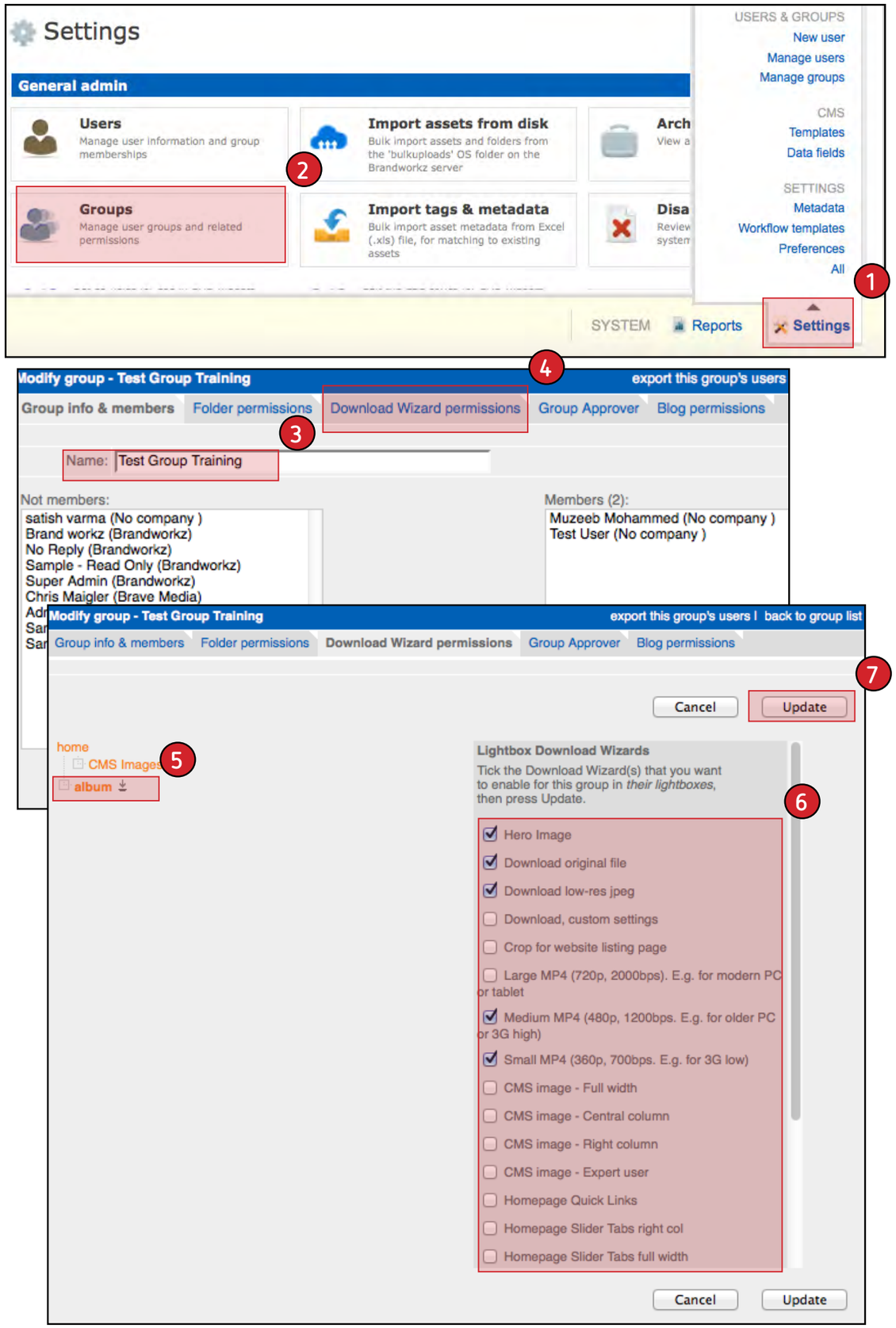
Folder Permissions for Web to Print are quite specific and need to be set by the Administrator for users to be able to create artworks. Asset permissions need to be selected as follows:

V = view assets is essential for them to work on this page.

A = add is essential, this function ensures the green ‘create new artwork’ button is visible.

M = modify is optional, it allows the user to edit or modify their artwork once they’ve created it.

D = delete is optional, it allows the user to delete any artwork they have created.

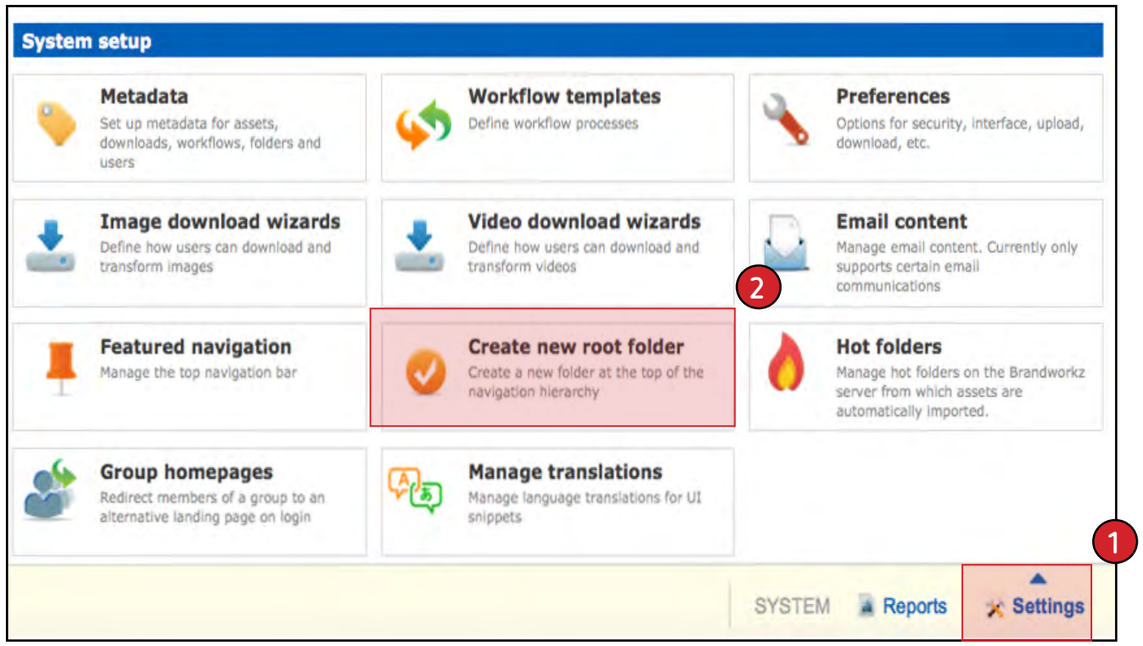


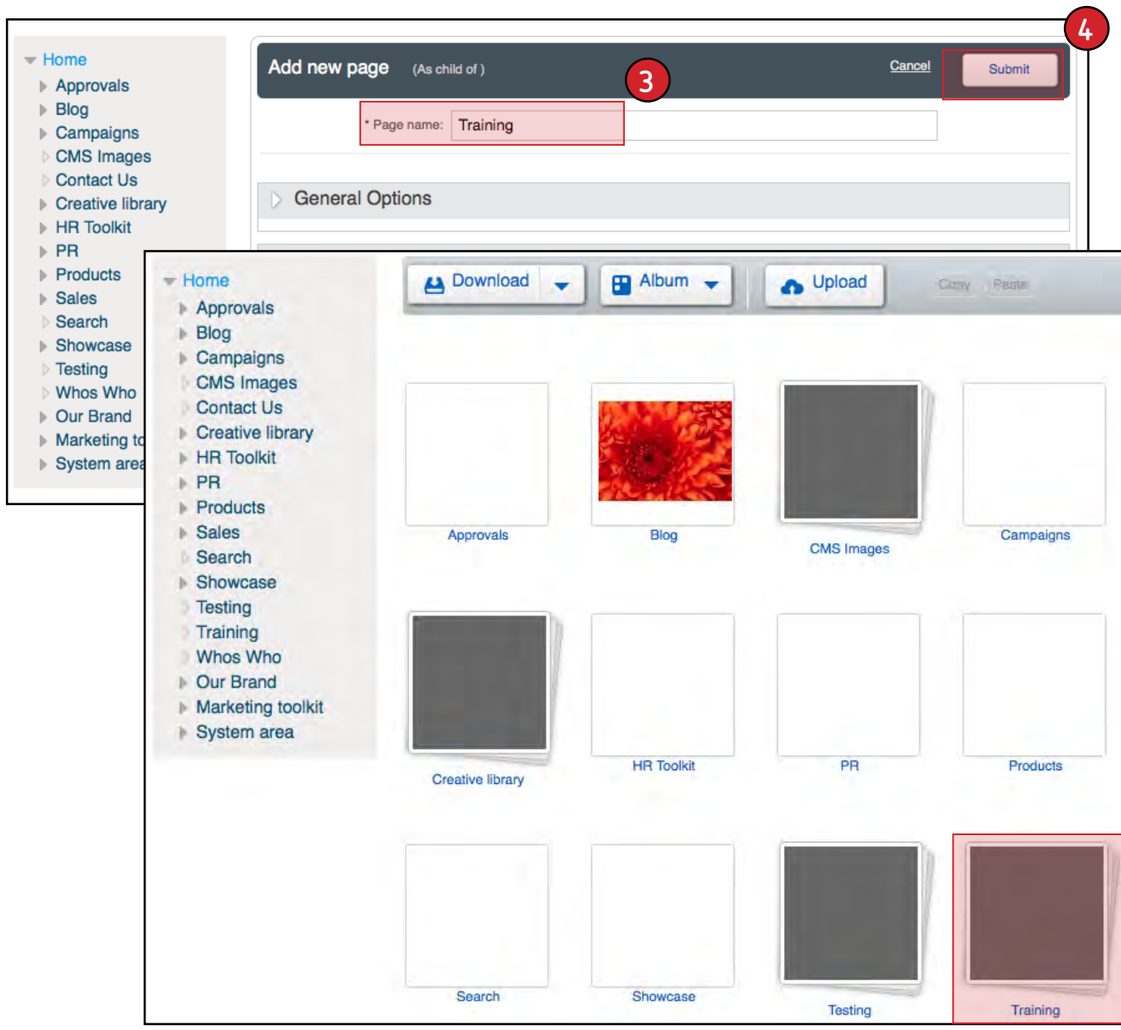
Download wizard permissions – Found within Groups

System administrators have the ability via the Groups section to assign download wizards to a chosen group for specific folders.

Exercise –
Apply a download wizard to a folder, for the group you have created

1. Click on the 'Settings' link in the admin bar at the bottom of the page.
2. Click on 'Groups'.
3. Select the group you used in the earlier exercise.
4. Click on the 'Download Wizard permissions' tab.
5. Select a folder from the list on the left.
6. Select the checkboxes for the download wizard you would like to assign.
7. Click 'update'.
8. Navigate to your chosen folder, and observe that members of the group now have the download wizard.





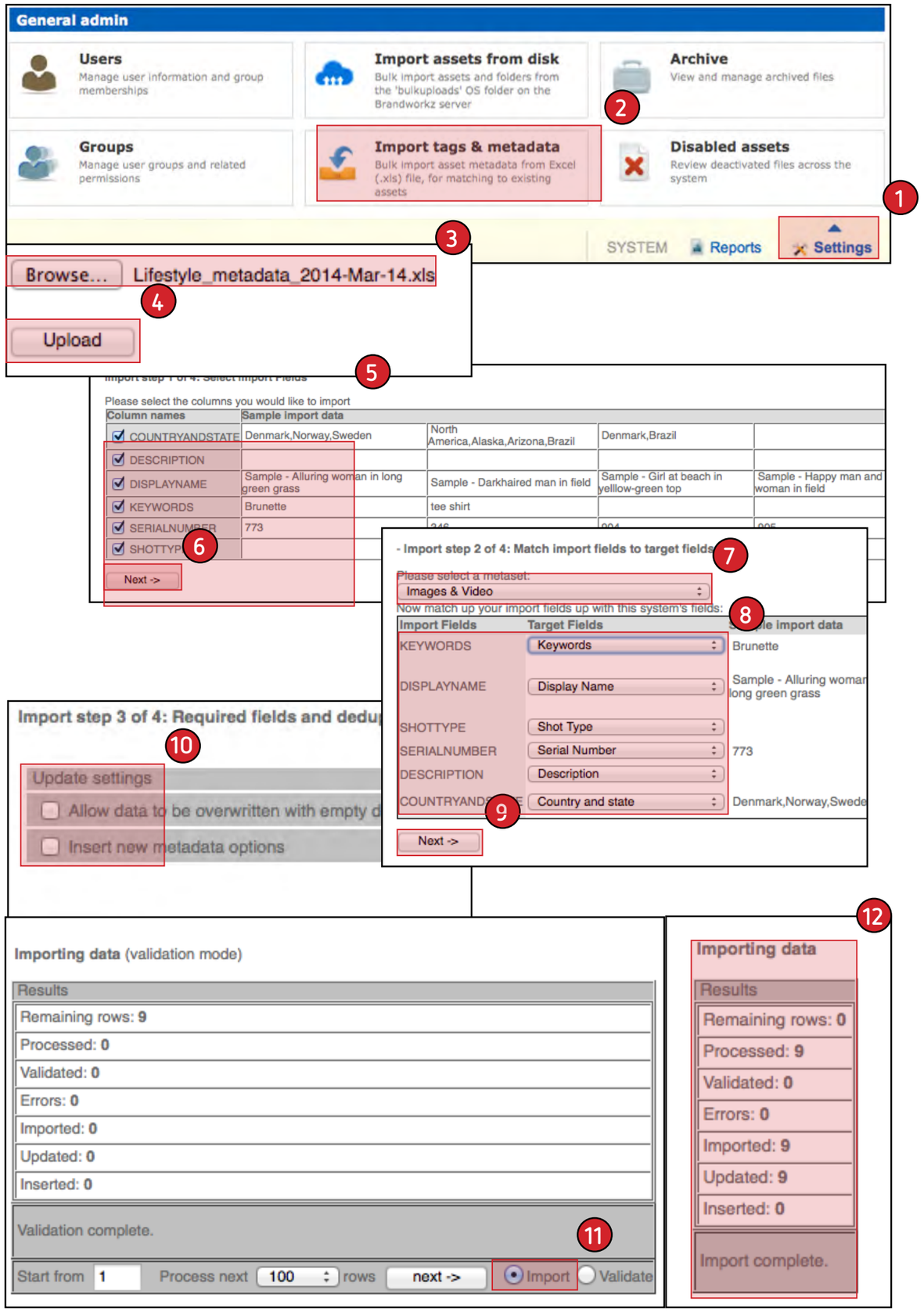
Create new root folder

A root folder will be a folder you choose to be part of the core structure of the site. It will be one of the highest folders in the hierarchy and is created in a similar way to creating a new folder, only it becomes a direct child of 'home'.

An example of a 'root' folder is the Training folder created by Brandworkz to train the client on their system. We all needed easy and direct access to this folder, thus, it seemed most sensible to be created as a 'root' folder rather than a sub-folder of a different section.

Exercise –
Create a new root folder

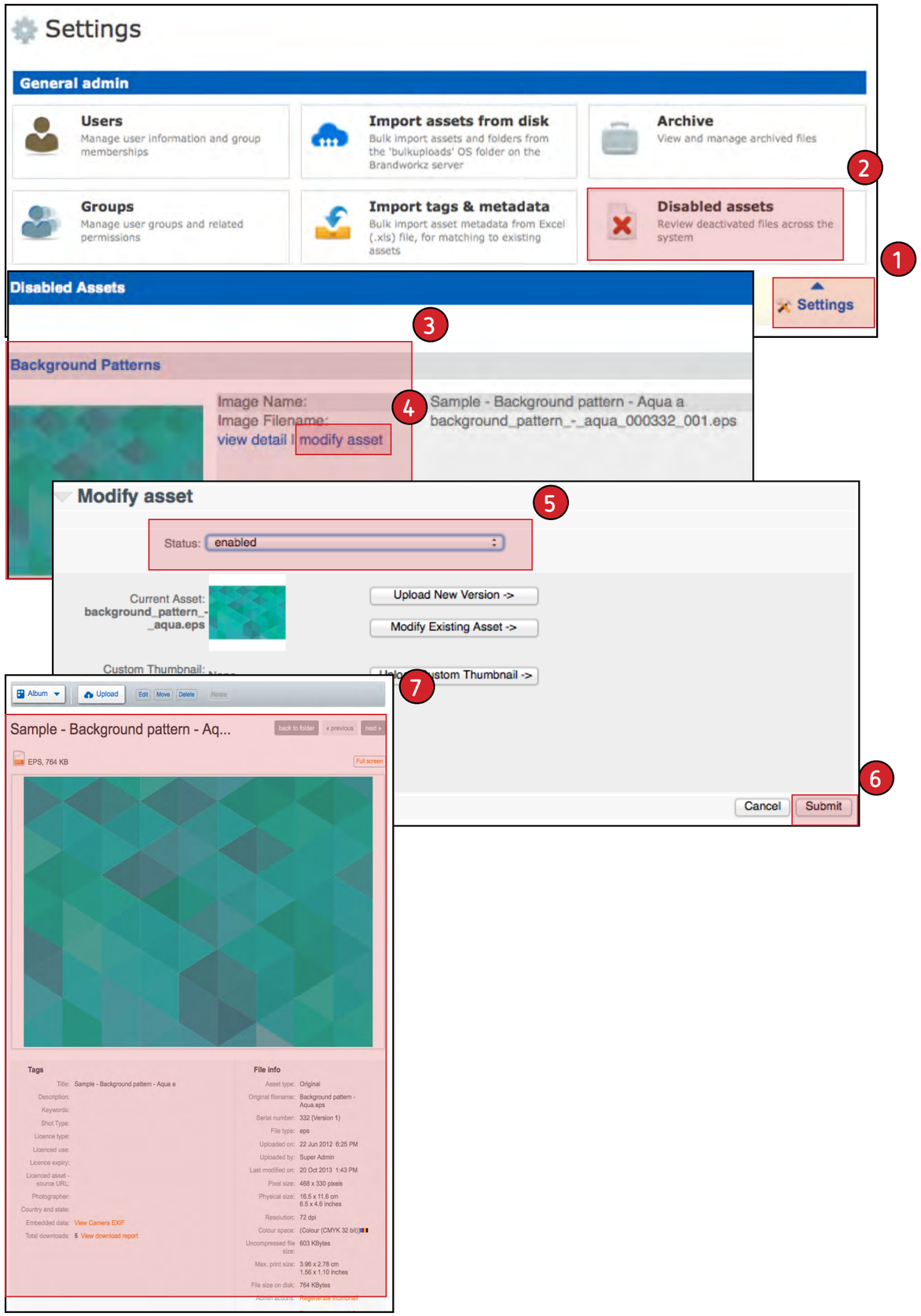
1. Click on 'Settings' in bottom admin bar.
2. Click on Create a new root folder.
3. Name the folder.
4. Click 'Submit'.
5. Click on your log on name to see the home folder structure and observe your new folder.



Import tags and metadata

Exercise –
Import tags and metadata

1. Click on ‘Settings’ in the admin bar at the bottom of the page.
2. Navigate to “Import tags & metadata” located on the left hand navigation.
3. Search for the .xls document you’ve exported earlier on in the training (Exporting metadata is explained within the Folder section of this document).
4. Click ‘Upload’.
5. Select the columns from the spreadsheet that you would like to import to the system.
6. Click ‘next’.
7. Next you should select the metaset that applies to these assets. For example if you are importing metadata for assets in the Asset library folder, use the Asset library metaset.
8. Make sure your ‘Import fields’ and ‘Target fields’ are matching.
9. Click ‘next’.
10. You don’t have to tick either of the next checkboxes to proceed with the import. However, if you wish you can choose from two options:
    Whether you want to allow data to be overwritten completely which includes inserting new blank information or
    To insert new metadata options, which simply adds in new metafield options
11. Click the ‘import’ radio button and click ‘next’.
12. Once the import is complete you will see the message ‘import complete’.



Disabled Assets

Here is where you can view, modify and reactivate disabled assets. To disable an asset see section on ‘Assets’ in the Chapter 3.

Exercise –
Reactivate a disabled asset

1. Click on ‘Settings’ in the bottom admin bar.
2. Click on ‘Disabled assets’.
3. The asset you have previously disabled should be listed here.
4. Click ‘Modify asset’. This will take you to the modify page.
5. Scroll to the modify asset section at the bottom of the page and select enabled from the status drop down.
6. Click ‘Submit’.
7. This will take you to the asset detail page.