



ADMINISTRATION GUIDE **(organise*it* V6)**

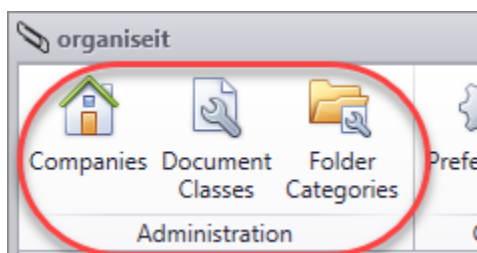
Doc v 1.0

INTRODUCTION

Overview

Organiseit Administration Module consist of 3 components:

1. Companies
2. Document Classes
3. Folder Categories



ACCESS TO ADMINISTRATION MODULE

Access to Administration module is governed by User Roles. User(s) with following role will be able to access Administration module.

1. Built-in Administrator (Admin user)
2. System Administrators
3. Company Administrators

Administration Tab in the ribbon will be active only for Built-in, System and Company Administrators.

Built-in Admin User and user(s) with System Administrator role are super users having root level access to organiseit.

Company Administrators have restricted administrative role in the company they have access to. On assigning Company Administrator role to a user, the user becomes company Administrator of all the accessible companies and get access on the organiseit paperclip in the tree. Company Administrators can perform admin level tasks except:

1. Add new User(s)
2. Add Group(s)
3. Create a Company Database

COMPANIES

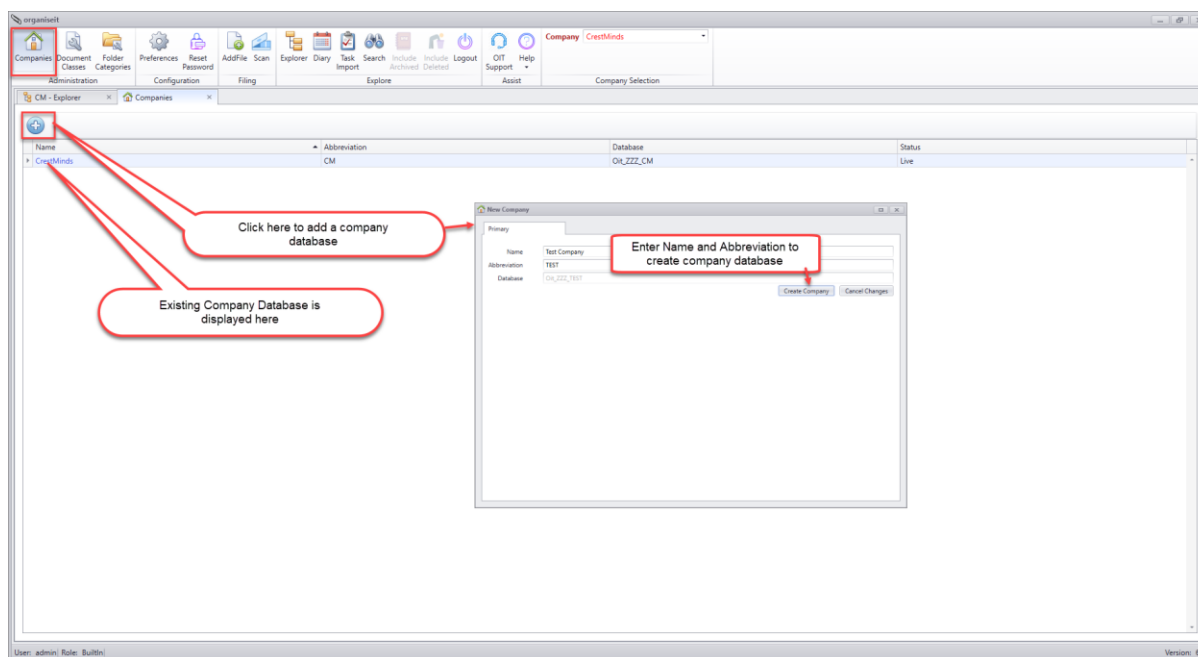
The main purpose of this tab under Administration Module is to provide user level security for the organiseit application.

This module facilitates:

1. Creation/Maintenance of Company Database(s), User(s) and Group(s)
2. Association of Users with Groups
3. Configuration of Users and Groups permissions on the organiseit Folder Hierarchy in each company
4. Creation of Archive Database(s) for each company

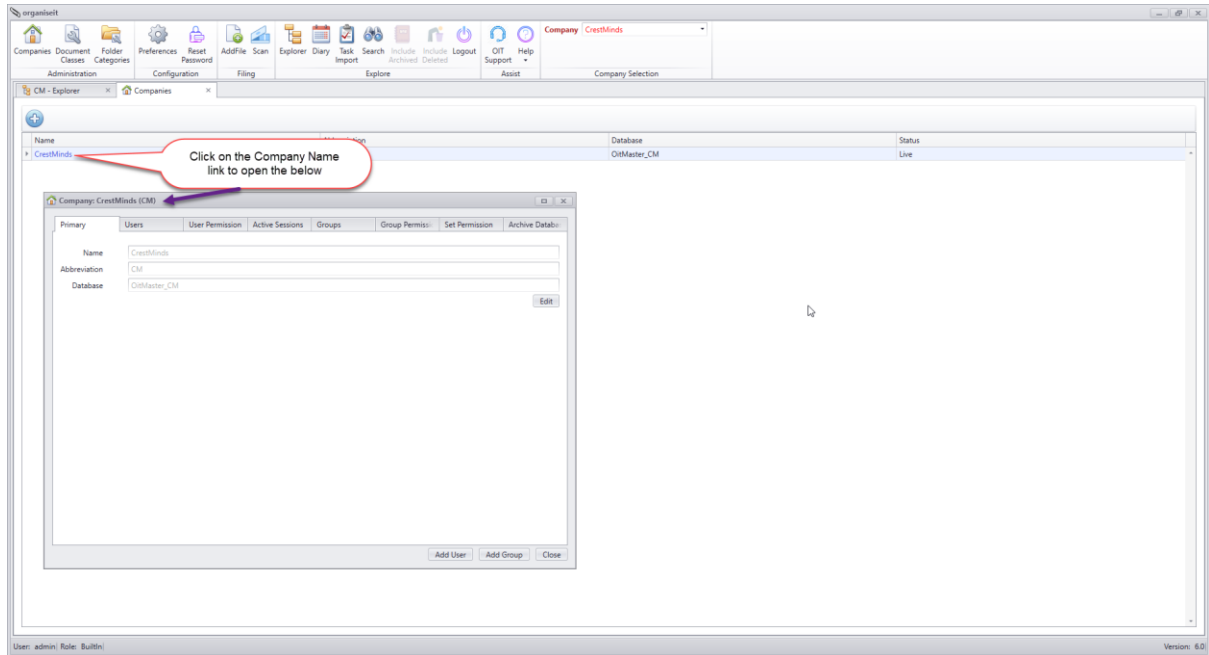
Organiseit is a multi-company application i.e. the user can create as many companies as required. The data stored in each company is locally available to that company only.

On clicking companies tab, you will be presented with following screen.



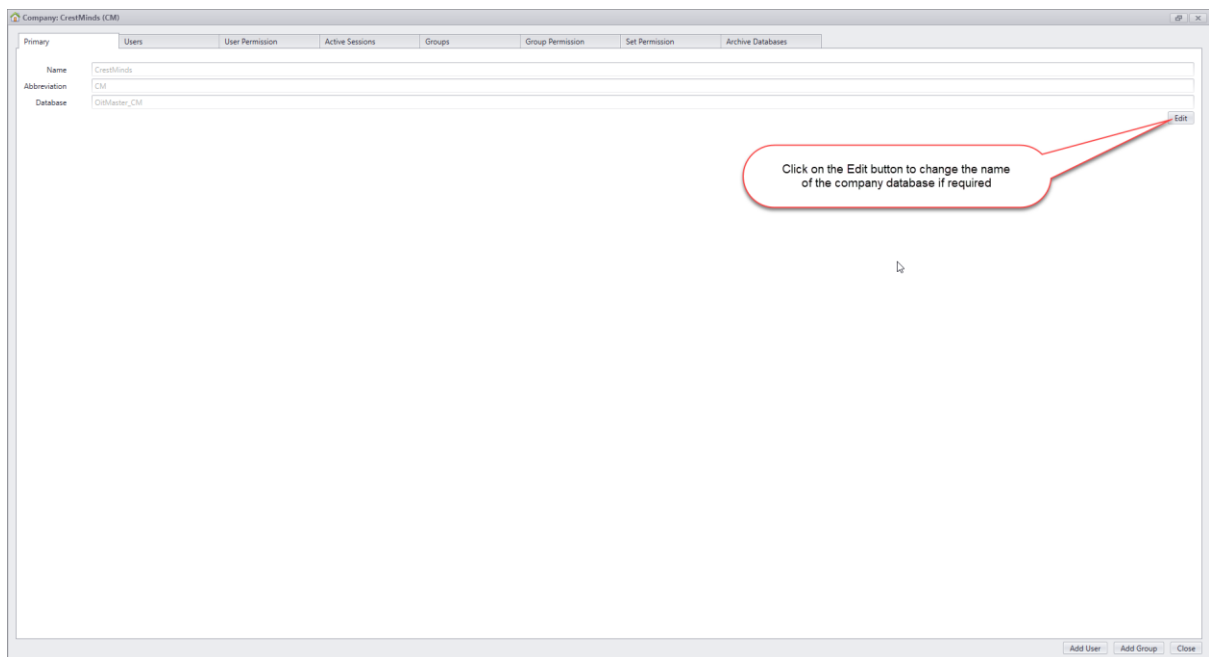
On clicking the blue colour hyperlink of a company, a multi-tab window opens which will enable the administrator to perform various operations allowed in a given company.

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Behaviour of each tab is displayed below through screenshots.

Primary Tab:



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Company: CrestMinds (CM)

Primary

Name: CrestMinds

Abbreviation: CM

Database: Oit_ZZZ_CM

Save Changes Cancel Changes

After clicking on the Edit button, you can change the name of the company database if required

Users Tab:

Company: CrestMinds (CM)

Primary Users User Permission Groups Group Permission Set Permission Archive Databases

All the column headers are sortable

Search a user using row search feature

Click on the hyper-link of a User Name to edit a user

Click here to export the user's list in CSV file

Click on a user to see if the user belongs to a Group

Tick/Untick to add/remove a user from the Group

Add a new User or Group from here

Add User Add Group Close

User Name	Full Name	User Kind	Company Access
Archana	Archana Singh	User	<input checked="" type="checkbox"/>
CA	CompanyAdmin	CompanyAdministrator	<input checked="" type="checkbox"/>
Randhir	Randhir Singh	User	<input checked="" type="checkbox"/>
Test User	Test User	InActive	<input type="checkbox"/>

Group

Test

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Company: CrestMinds (CM)

Users

User Name	Full Name	User Kind	Company Access
Anirich	Anirich Patel	User	<input checked="" type="checkbox"/>
Prasad	Prasad Thomre	User	<input checked="" type="checkbox"/>
Kandher	Kandher Singh	System-Administrator	<input checked="" type="checkbox"/>
Test User	Test User	InActive	<input type="checkbox"/>

STEP - 1: New User

Full Name (Required Field)
UserName (Required Field)
Email (Optional Field)
Password (Use 6 to 16 characters)
Confirm Password

Click here to Add User by filling the required information in this form

STEP - 2: Users: Prasad (Prasad Thomre)

Companies

Company	Database	Status
CrestMinds	Olt_ZZZ_CM	<input checked="" type="checkbox"/>

After Creating a user, click on the Company Tab to grant company access to the user

Buttons: Add User, Add Group, Close

User: Prasad (Prasad Thomre)

Primary **Companies** **Roles**

Role
Auditor
DataExtractor
CompanyAdministrator
SystemAdministrator

'User' is a default Role that automatically gets assigned after creation of a user.

The above 4 Roles are optional and can be assigned to any user depending upon business requirements.

Close

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User: DavidM (David Miller)

Primary Companies Roles

Full Name David Miller

UserName DavidM

Email

Is Active ☒

Edit

Close

Edit User to make it Active and Inactive and Reset user's password.

User: DavidM (David Miller)

Primary

Full Name David Miller

UserName DavidM

Email

Is Active ☒

ResetPassword ☐

Save Changes Cancel Changes

Check / Uncheck the box to make a user Active / InActive in OIT

The screenshot shows a user management interface for 'User: Vivan (Vivan)'. The 'Primary' tab is active. Fields include Full Name (Vivan), UserName (Vivan), Email (empty), Is Active (checked), and ResetPassword (checked). Below these are Password and Confirm Password fields, both masked with dots. A red arrow points from a text box to the ResetPassword checkbox. The text box contains the instruction: 'To reset a user password, click on ResetPassword field and set the desired password'. The Password field has a hint 'Use 6 to 16 characters' and a strength indicator 'Weak'. At the bottom right are 'Save Changes' and 'Cancel Changes' buttons.

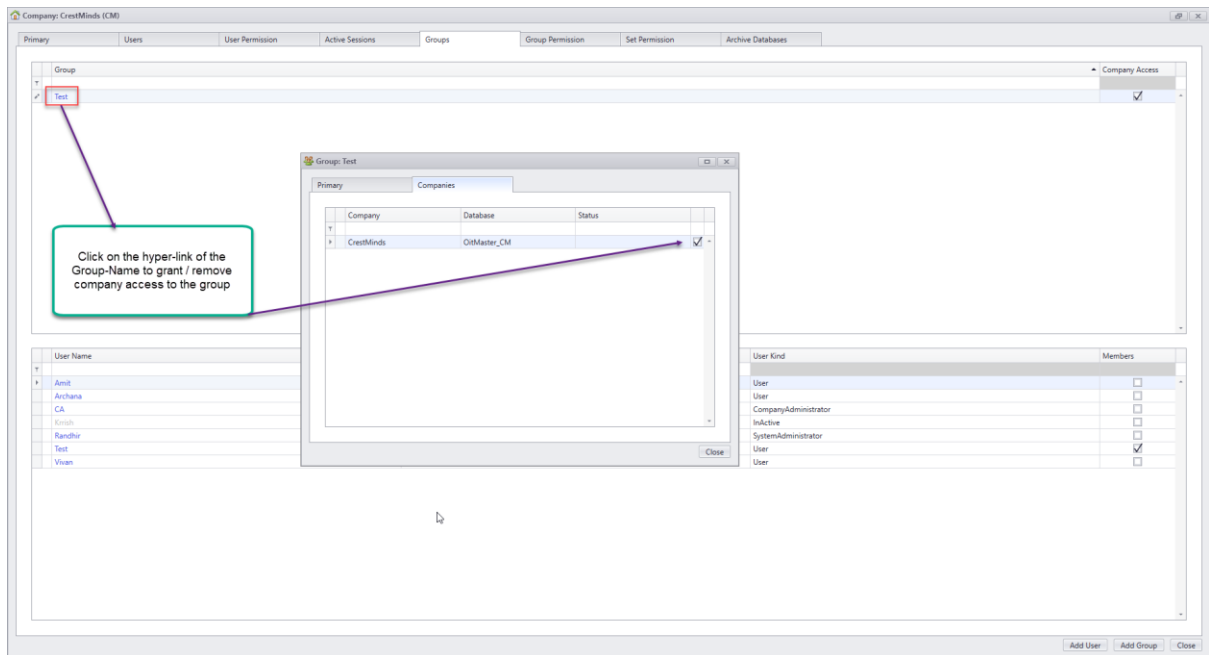
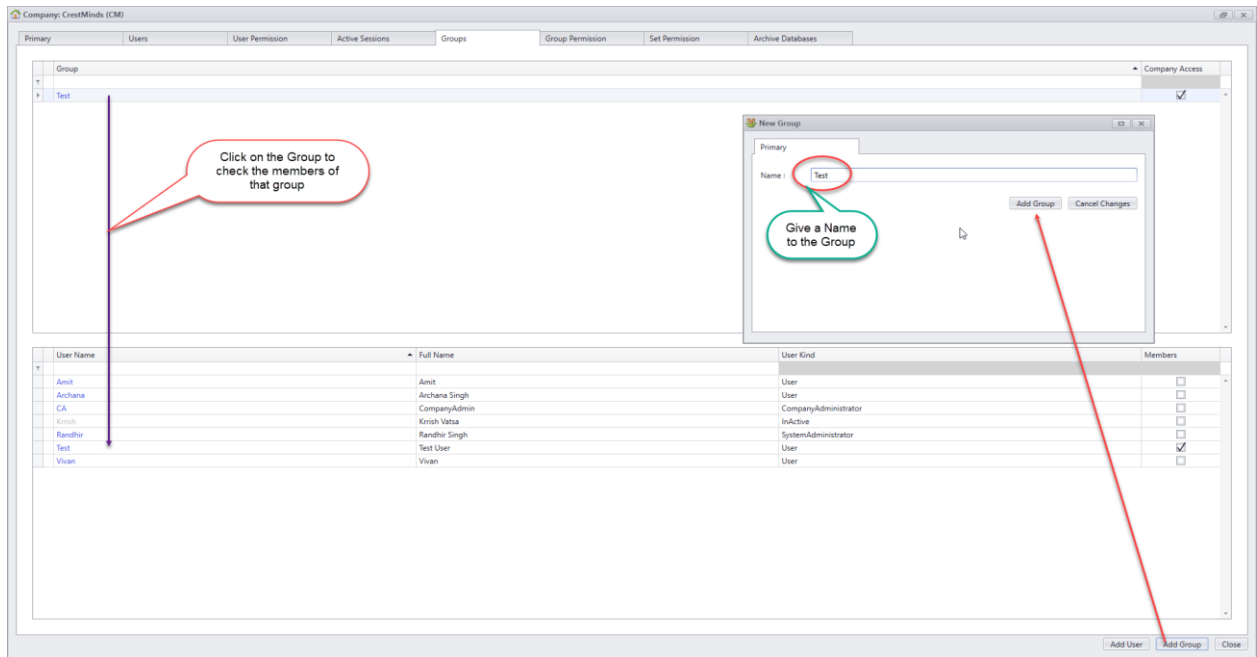
Groups Tab:

A group is a collection of user accounts that can be managed as a single unit. Users that belong to a particular group are referred to as group members.

Using groups can simplify administration by assigning a common set of permissions to many user accounts at once, rather than assigning permissions to each account individually. When a user is added to a group, it will inherit all the permissions that are assigned to that group. Similarly, when a user is removed from a group, it loses all those permissions that it has inherited by being a member of that group.

organiseit allows you to create any number of groups in the organiseit database.

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Set Permission Tab:

Once the User(s) and Group(s) have been created, it's now time to assign them folder access so that upon login to the application user(s) can only see folder(s) on which the permission have assigned.

Folder Access to User(s)/Groups:

- User(s) having System Administrator role will have root level access to paperclip. The Folder Level access of System Administrators cannot be changed.

- ii. User(s) having Company Administrator role will have root level access to paperclip to all the accessible companies. The Folder Level access of Company Administrators cannot be changed.
- iii. User(s) and Group(s) can be assigned access at Site/Cabinet/Folder.

Folder Access Roles:

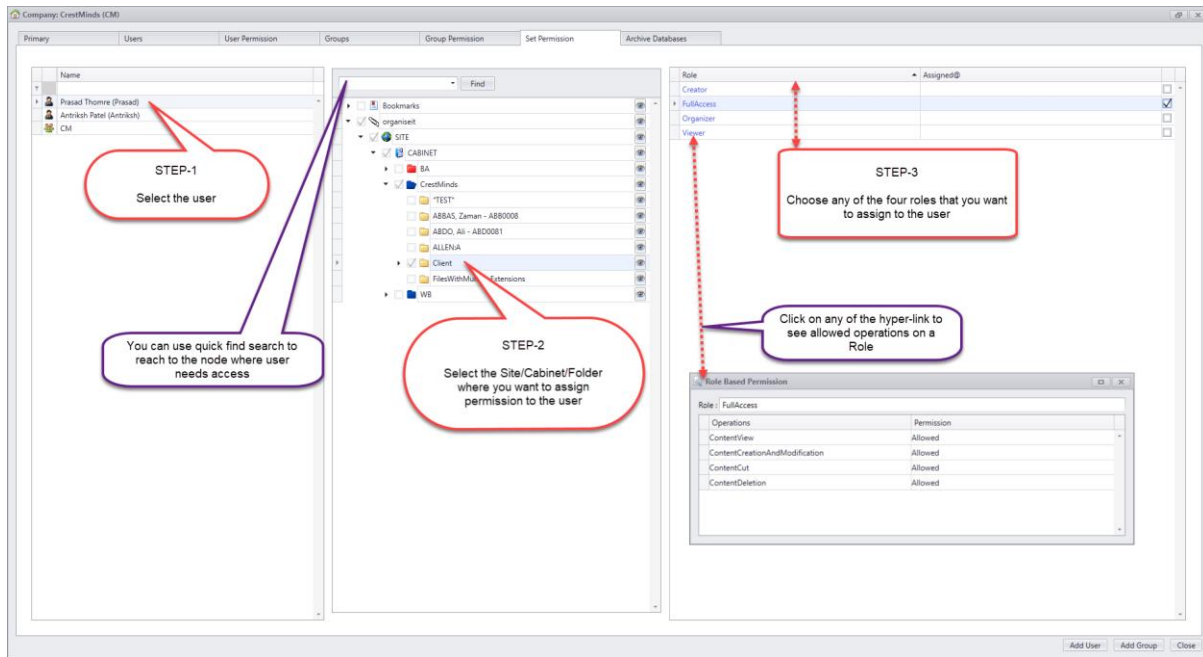
Folder access to a User/Group can be governed by 4 roles:

- i. Viewer
- ii. Creator
- iii. Organizer
- iv. Full Access

The image displays four sequential screenshots of the 'Role Based Permission' dialog box, each showing the permissions assigned to a specific role. The roles are Viewer, Creator, Organizer, and FullAccess. Each screenshot shows a table with two columns: 'Operations' and 'Permission'.

Role	Operations	Permission
Viewer	Operations	
	ContentView	Allowed
Creator	Operations	
	ContentView	Allowed
	ContentCreationAndModification	Allowed
Organizer	Operations	
	ContentView	Allowed
	ContentCreationAndModification	Allowed
	ContentCut	Allowed
FullAccess	Operations	
	ContentView	Allowed
	ContentCreationAndModification	Allowed
	ContentCut	Allowed
	ContentDeletion	Allowed

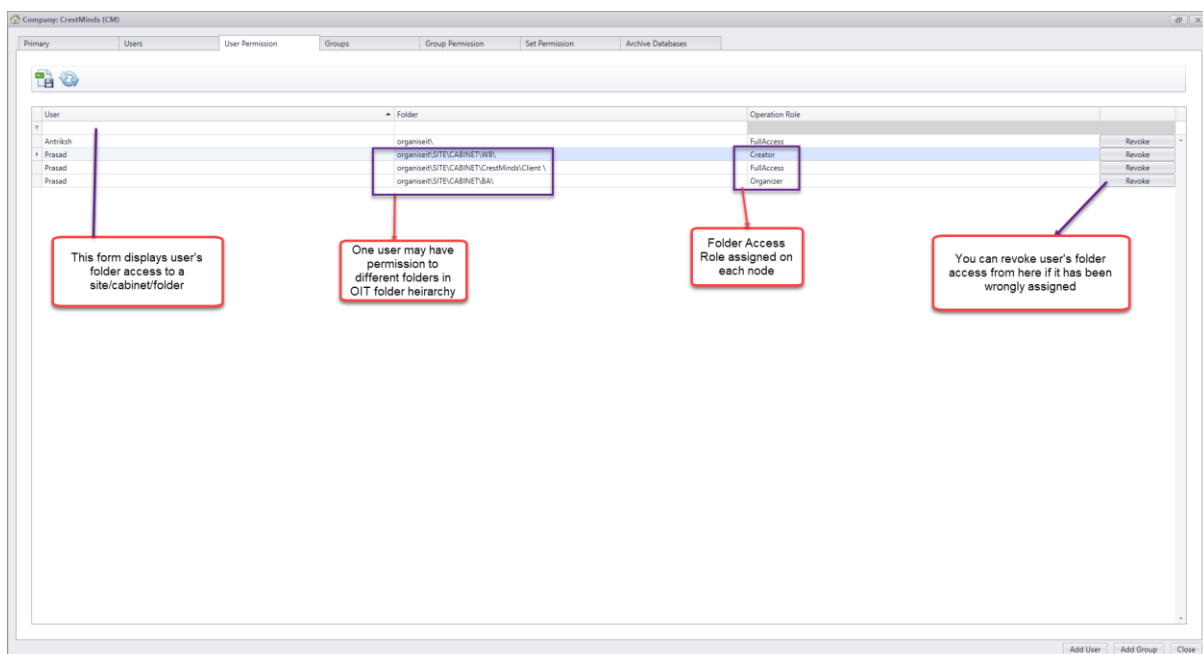
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User Permission Tab:

This tab provides a unified view of the folder permission for all the users in that company.

User(s) having System or Company Administrator privileges will not be shown in this Tab because by default they have root level access to organiseit paperclip.



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Group Permission Tab:

The screenshot shows the 'Group Permission' tab in the CrestMinds (CM) application. The interface includes a top navigation bar with tabs: Primary, Users, User Permission, Active Sessions, Groups, Group Permission (selected), Set Permission, and Archive Databases. Below the navigation bar, there is a table with columns: Group, Folder, and Operation Role. The table contains two rows: 'Test' with 'organiseit\CestMinds\' and 'FullAccess', and 'Test1' with 'organiseit\XML Import\' and 'Organizer'. To the right of the table, there are two 'Revoke' buttons. Two callout boxes provide additional information: one points to the table rows stating 'Similar to User Permission, Group Permission Tab allows you to check the locations and role that has been assigned to a Group.', and the other points to the 'Revoke' buttons stating 'If required, group permission can be revoked from here.' At the bottom right, there are buttons for 'Add User', 'Add Group', and 'Close'.

Group	Folder	Operation Role
Test	organiseit\CestMinds\'	FullAccess
Test1	organiseit\XML Import\'	Organizer

Active Session Tab:

The screenshot shows the 'Active Sessions' tab in the CrestMinds (CM) application. The interface includes a top navigation bar with tabs: Primary, Users, User Permission, Active Sessions (selected), Groups, Group Permission, Set Permission, and Archive Databases. Below the navigation bar, there is a table with columns: Name, User Name, User Kind, and Connection Datetime. The table contains two rows: 'Vivan Vatsa' with 'Vivan', 'SystemAdministrator', and '04-05-2020 12:56:09 +05:30', and 'Built in Administrator User' with 'admin', 'Builtin', and '17-05-2020 10:26:49 +05:30'. To the right of the table, there are two 'Kill Session' buttons. Two callout boxes provide additional information: one points to the 'Export Active User' button stating 'Click here to export list of active users in the selected company database', and the other points to the 'Kill Session' buttons stating 'You can kill an individual users session by clicking on \'Kill session\''. A third callout box points to the 'Kill Selected Sessions' button stating 'For killing multiple users session at once, tick the user's whose sessions need to be killed and then click on the menu - \'Kill Selected Sessions\''. A central callout box states 'This Tab provides list of users that are active or logged-in to the application'. At the bottom right, there are buttons for 'Add User', 'Add Group', and 'Close'.

Name	User Name	User Kind	Connection Datetime
<input checked="" type="checkbox"/> Vivan Vatsa	Vivan	SystemAdministrator	04-05-2020 12:56:09 +05:30
<input type="checkbox"/> Built in Administrator User	admin	Builtin	17-05-2020 10:26:49 +05:30

Archive Databases Tab:

Company: CrestMinds (CM)

Primary Users User Permission Active Sessions Groups Group Permission Set Permission Archive Databases

+ New

Click here to create an Archive Database for the selected Company Databases

Database	Creation Date Time	Closing Date Time	IsActive?
OttMaster_CM_20200303182323	03-03-2020 18:23:23 +05:30	17-05-2020 11:51:16 +05:30	<input type="checkbox"/>
OttMaster_CM_20200517115116	17-05-2020 11:51:16 +05:30		<input checked="" type="checkbox"/>

Archive Databases Tab allows:

1. Setting up of Archive Database for each Live Database.
2. There can be any number of Archive Database for a given Live Database. However, at any given moment only one of these Archive Databases can be current/active. Current means the database to which the documents/folders will be archived to.
3. When a new Archive database is created the previous Archived database is closed and becomes inactive (read-only).

Add User Add Group Close