Administration Guide

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www.idoxgrantfinder.co.uk

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1 User roles

User accounts can be allocated additional permissions, called ‘roles’, which enable them to undertake administrative tasks on the website. The additional roles are **Administrator** and **Workgroup manager**.

- An **Administrator** can:
  - manage users;
  - manage recipients;
  - manage workgroups;
  - run user activity reports;
  - share reports, saved searches, search templates, personal bulletins, location groups and comments with the organisation as a whole.

- A **Workgroup manager** can:
  - manage workgroups.

Organisations can have as many Administrators and Workgroup managers as necessary to meet their particular requirements.

Administrators have to be set up by Idox (usually during the initial configuration of the organisation’s account). Workgroup managers can be created on the site by Administrators at any time.

2 Administration area

Users who have been allocated an Administrator or Workgroup manager role will be provided with access to the Administration area, which can be accessed from the main menu:

Note: The Administration menu is not available to standard users.

The areas within the *Administration* section are:

- **User administration** – used to edit user details by adding, suspending and deleting users.
- **Recipient administration** – used to edit recipient details by adding, suspending and deleting recipients.
- **Workgroup administration** – used to create, manage and delete workgroups.
- **User reports** – used to produce activity reports for users and the organisation.
- **Administration guide** – from here you can download the latest administration guide.

Administrators have access to all areas whereas Workgroup managers can only access the Workgroup administration area.

3 User administration

3.1 Managing users

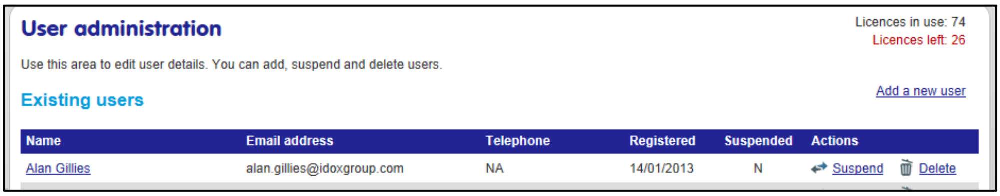
When accessing the *User administration* area you will see either:

- all existing users within your organisation listed in alphabetical order by name; or

- an A-Z navigation bar (see below) which allows you to view user accounts by the first letter of their account name.

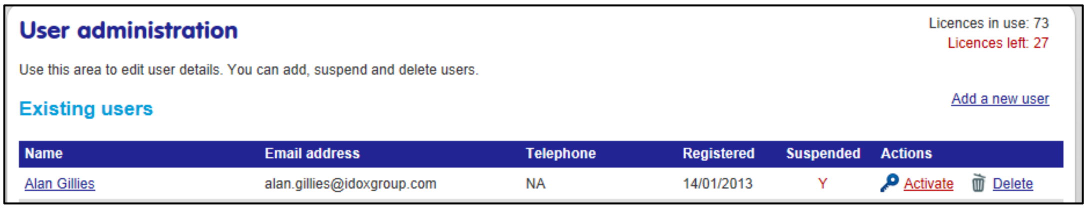
The type of display you see is dependent on the number of users you have. If you have 50 users or less, you will see all users listed in alphabetical order. If you have more than 50 users, you will see the A-Z navigation bar.

In either case, you can see at a glance their email address, telephone number, the date they were registered and whether they are currently active or suspended.



The number of user licences in use and still available are shown at the top of the section. You will not be able to add users once all your licences have been used. If you require more licences, please contact the Customer Services department at Idox.

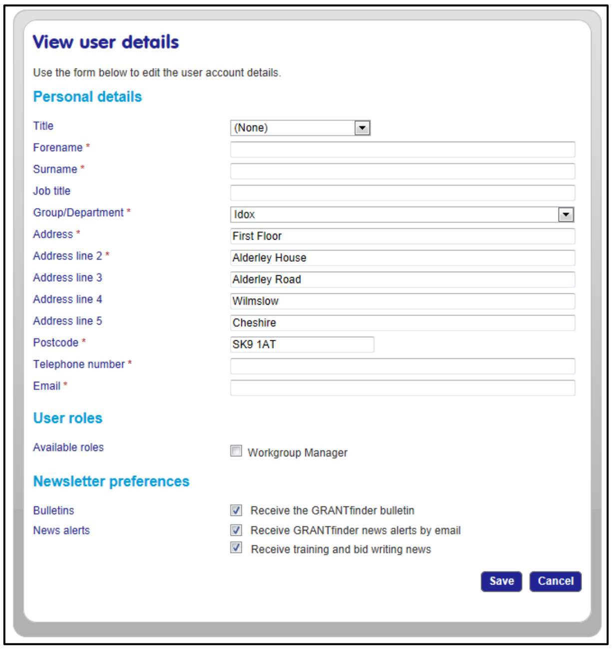
You can use the **Suspend** and **Delete** actions to temporarily suspend or permanently delete accounts. Suspended accounts can be reactivated at any time by clicking the **Activate** action which is displayed when a user is suspended.



Note: Suspended accounts can be reactivated at any time; deleted accounts cannot be reactivated.

3.2 New users

New users can be added at any time by clicking the **Add a new user** link. The registration process is straightforward; simply enter the mandatory information and as much of the optional information as you require.



By default, new users will be subscribed to receive the bulletin, news alerts and training and bid writing news. This can be changed by unchecking the relevant boxes under *Newsletter preferences*. Please note that additional options will be displayed if subscriptions to POLICYfinder and RESEARCHconnect have been purchased.

A new user can be allocated the Workgroup manager role by checking the box under *User roles*.

Click **Save** to register the user. The new user will then be automatically sent an email asking them to create a secure password. Once this has been done, the user will be able to log on to the website.

3.3 Modifying users

To modify the details of an existing user, click on the user's name in the *Existing users* list. The user details screen will then be displayed so that you can make your required amendments. Once you have finished, click **Save** to save your changes.

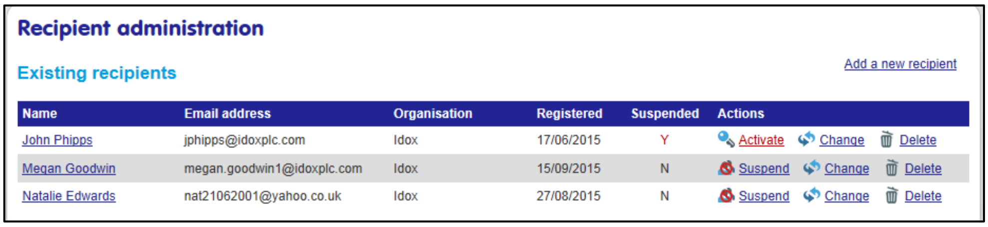
4 Recipient administration

4.1 Managing recipients

Recipients can be created by users in order to share information. To see and manage the recipients created for your organisation, you can use the *Recipient administration* area. You are also able to upgrade recipients to full users of the system.

When accessing the *Recipient administration* area you will see a list of existing recipients listed in alphabetical order.

You can see at a glance their email address, organisation, the date they were registered and whether they are currently active or suspended.



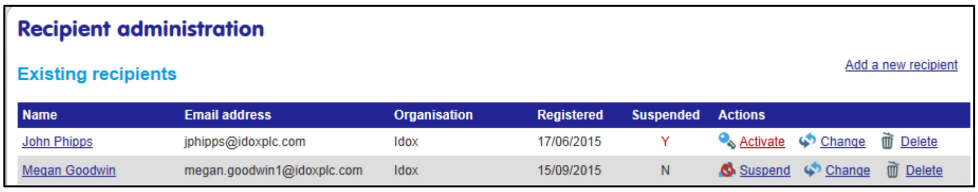
Recipient administration

Existing recipients

Add a new recipient

Name	Email address	Organisation	Registered	Suspended	Actions
John Phipps	jphipps@idoxplc.com	Idox	17/06/2015	Y	Activate Change Delete
Megan Goodwin	megan.goodwin1@idoxplc.com	Idox	15/09/2015	N	Suspend Change Delete
Natalie Edwards	nat21062001@yahoo.co.uk	Idox	27/08/2015	N	Suspend Change Delete

You can use the **Suspend** and **Delete** actions to temporarily suspend or permanently delete accounts. Suspended accounts can be reactivated at any time by clicking the **Activate** action which is displayed when a recipient is suspended.



Recipient administration

Existing recipients

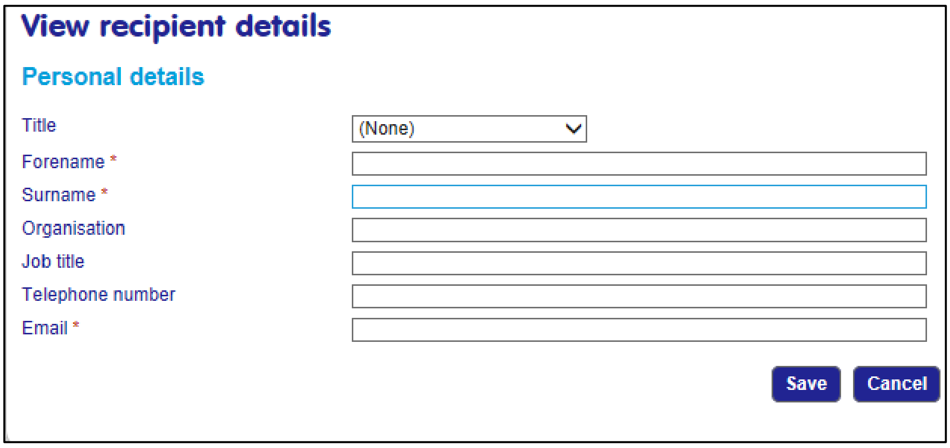
Add a new recipient

Name	Email address	Organisation	Registered	Suspended	Actions
John Phipps	jphipps@idoxplc.com	Idox	17/06/2015	Y	Activate Change Delete
Megan Goodwin	megan.goodwin1@idoxplc.com	Idox	15/09/2015	N	Suspend Change Delete

Note: Suspended accounts can be reactivated at any time; deleted accounts cannot be reactivated.

4.2 New recipients

New recipients can be added at any time by clicking the **Add a new recipient** link. The registration process is straightforward; simply enter the mandatory information and as much of the optional information as you require.



Click **Save** to register the recipient.

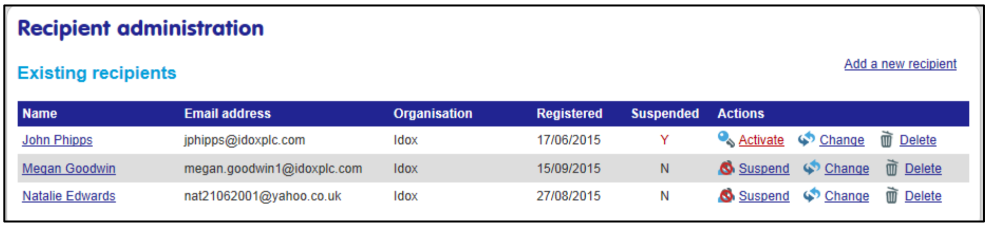
Once added recipients will be available for users to select when sharing information.

4.3 Modifying recipients

To modify the details of an existing recipient, click on the recipient's name in the *Existing recipients* list. The recipient details screen will then be displayed so that you can make your required amendments. Once you have finished, click **Save** to save your changes.

4.4 Changing the status of a recipient

From time to time, you may want to upgrade a recipient to a full user. To do this, just click on the **Change** link in the *Actions* column next to the recipient you want to upgrade.



Recipient administration

Existing recipients

Add a new recipient

Name	Email address	Organisation	Registered	Suspended	Actions
John Phipps	jphipps@idoxplc.com	Idox	17/06/2015	Y	Activate Change Delete
Megan Goodwin	megan.goodwin1@idoxplc.com	Idox	15/09/2015	N	Suspend Change Delete
Natalie Edwards	nat21062001@yahoo.co.uk	Idox	27/08/2015	N	Suspend Change Delete

Once you confirm the change, the recipient will be upgraded to a full user and will be sent an email to create a password. Once a password has been created, they will be able to log onto the site in the normal way. Any alerts they were receiving as a recipient will continue as a full user.

Note: Any recipient being upgraded to a full user will need to have an email address which conforms to the lockdown of the site.

5 Workgroups

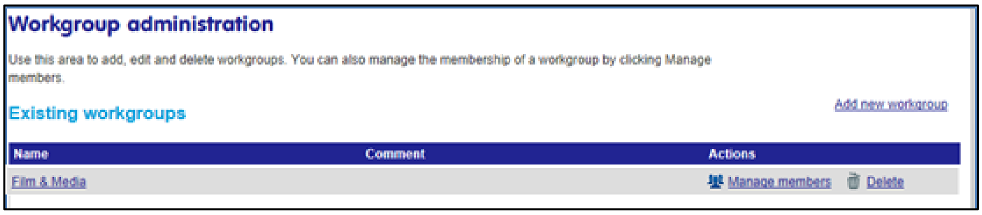
The workgroup functionality allows organisations to create and manage designated groups of users within their funding community ensuring information is both well-managed and disseminated only to those who need it.

Workgroups allow the sharing of reports, saved searches, search templates, email alerts, comments and news articles.

Administrators and Workgroup managers are able to create workgroups and assign users to them.

5.1 Creating a workgroup

To create a new workgroup, click the **Add new workgroup** link in the *Workgroup administration* area.



Workgroup administration

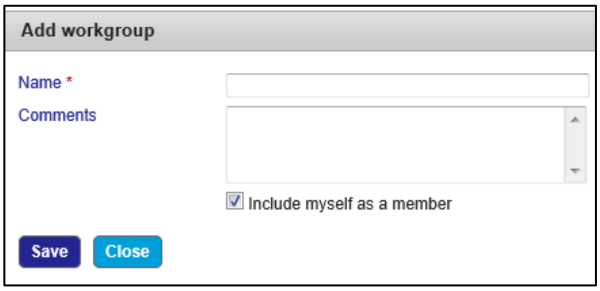
Use this area to add, edit and delete workgroups. You can also manage the membership of a workgroup by clicking Manage members.

Existing workgroups

Add new workgroup

Name	Comment	Actions
Film & Media		Manage members Delete

You then need to provide a name for the workgroup and optionally enter a comment.



By default, you will be automatically included as a member of the workgroup. If you do not want to be a member, uncheck the box.

Click **Save** to create the workgroup.

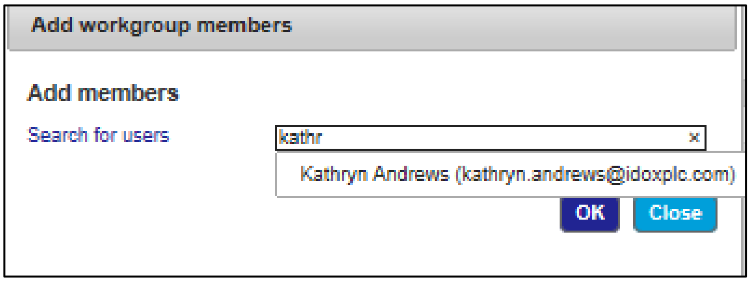
5.2 Adding members to a workgroup

To add members to a workgroup:

Click the **Manage members** link next to the required workgroup.

Click the **Add new members** link.

Start typing the name of the user you wish to add to the workgroup and select from the offered options.



Repeat the process to add more users. Once you are finished, click **OK.**

When a user has been added to a workgroup, they will receive an email inviting them to join the workgroup. They can accept or decline the invitation in their *My workgroups* area.

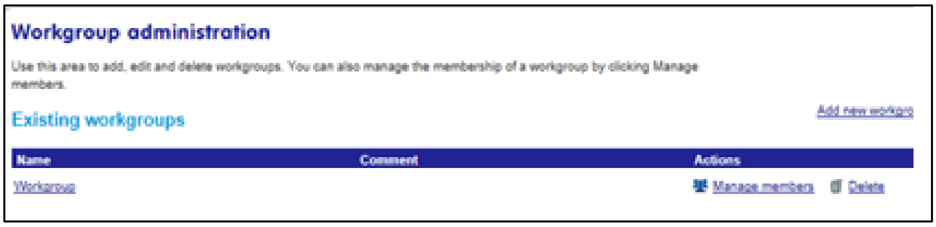
5.3 Email correspondence

By default, any email correspondence relating to the workgroup is automatically sent to all Administrators and Workgroup managers. To specify a member(s) within the workgroup to receive the workgroup correspondence instead, click the **Enable** action against the required user(s). **Note:** The member must be an Administrator or Workgroup Manager.

Workgroup correspondence includes notification of users declining to join or leaving the workgroup.

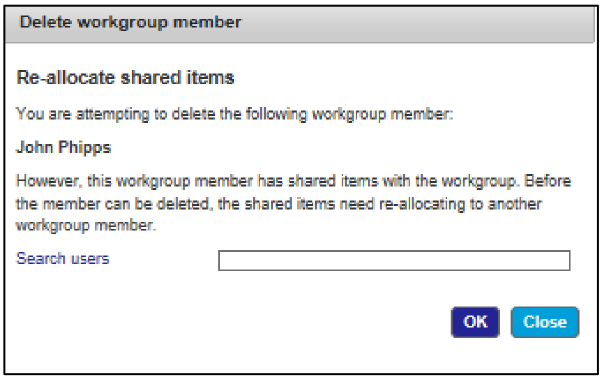
5.4 Removing a member from a workgroup

To remove members from a workgroup, click the **Manage members** link next to the required workgroup.



Click the **Delete** action next to the member you want to remove from the workgroup.

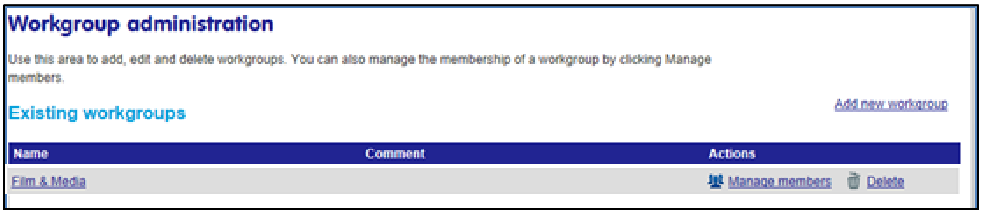
In the event that a member being removed from the workgroup has shared items with the workgroup, you will be prompted to transfer the shared items to another workgroup member.



Start to type the name of the user to whom you wish to transfer the shared items and select from the displayed list of options. Click **OK** and the items will be transferred and the original user removed from the workgroup. **Note:** You can only transfer shared items to a member of the relevant workgroup.

5.5 Deleting a workgroup

In the *Workgroup administration* area, click the **Delete** action against the workgroup you want to delete.

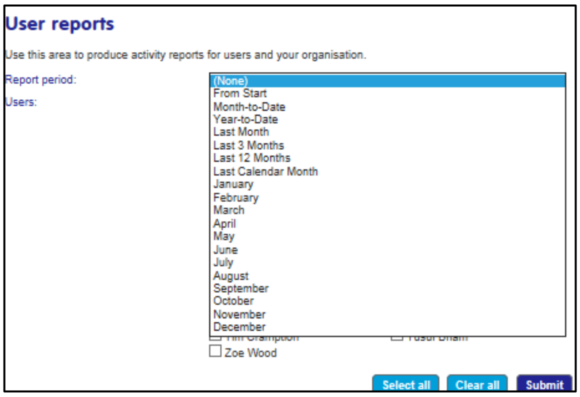


Confirm the deletion and the workgroup will be deleted.

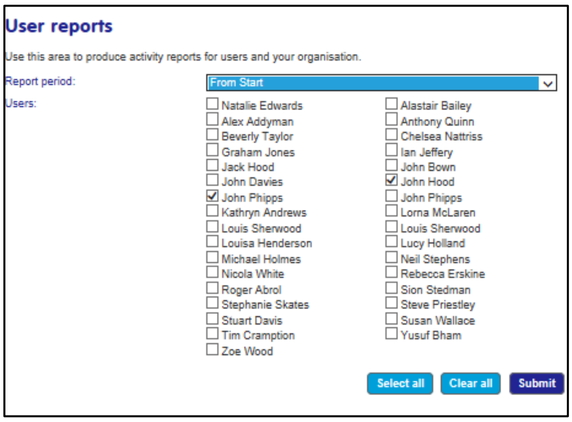
6 User reports

This section allows Administrators to produce activity reports based on an individual user's usage of the system.

First, select a reporting period from the *Report period* drop-down box.



Next, select the users to be included in the report. This can be done individually by checking the box next to the user(s) name or by clicking the **Select all** button.



Clicking **Submit** will run the report. You will then be able to download or save the report which is produced in Excel format.

The report consists of a summary table and a details section. The activity statistics include the number of:

- logins;
- searches;
- funds viewed;
- policies viewed – providing you have subscribed to POLICYfinder;
- reference library downloads;
- reports run.

Specific User Activity

Summary

Report Produced for	Idox
Creation Date	03-Feb-2016
Reporting Period	From Start (To 03-Feb-16)
Logins	256
Searches	496
Funds viewed	222
Policies viewed	11
Reference library downloads	2
Fund reports run	67

Logins

User	Date/Time
John Phipps	03/02/2016 08:15:55
John Phipps	03/02/2016 08:13:59
John Phipps	03/02/2016 07:40:08
John Phipps	02/02/2016 16:04:39
John Phipps	01/02/2016 11:50:23
John Phipps	27/01/2016 13:23:28
John Phipps	25/01/2016 17:16:40
John Phipps	25/01/2016 15:21:16
John Phipps	15/01/2016 13:35:05
John Phipps	08/01/2016 10:11:34
John Phipps	07/01/2016 07:33:11

7 Sharing information with your organisation

Standard users can share information with other users and workgroups. However, Administrators are additionally able to share information with all users within their organisation. This includes sharing:

- reports;
- saved searches;
- search templates;
- personal bulletins;
- location groups;
- comments (standard users can also post an organisation-wide comment).

To share an item with all users in the organisation, Administrators simply need to check the *Send to*/*Share with organisation* box as appropriate.

8 Further information

Should you require further information to that provided in this guide, please contact our Customer Services department at:

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Email: grants.customer.services@idoxgroup.com
www.idoxgrantfinder.co.uk