COMPANY ADMIN GUIDE

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V0.3

Contents

1 Introduction

The purpose of this document is to detail the activities that a CurateFx Company Administrator can perform.

1.1 Roles

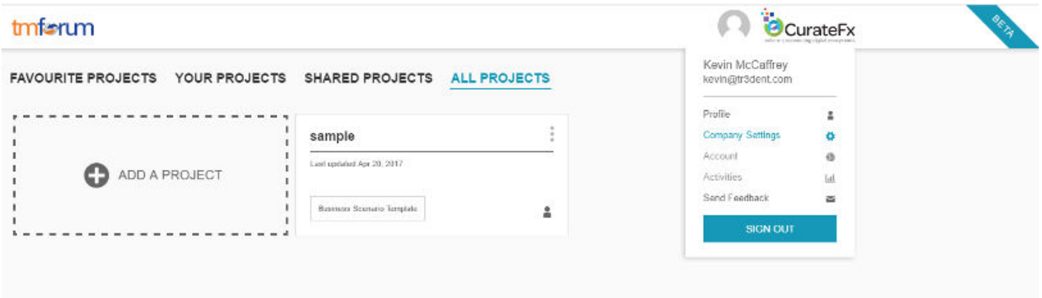
As background, it is important to understand that there are two levels of User Access that can be provided to the application;

Company Admin:	This role has the authority to perform all activities related to a specified Company which includes Company details, Groups, Project Types and Users. These actions are carried out within the Admin Console of the application which is accessed through the Application menu.
Users:	Normal application user that is provided rights to Company(s) and Groups. Access to the application can be granted by either a System Admin or Company Admin user. Users do not have access to the Admin Console.

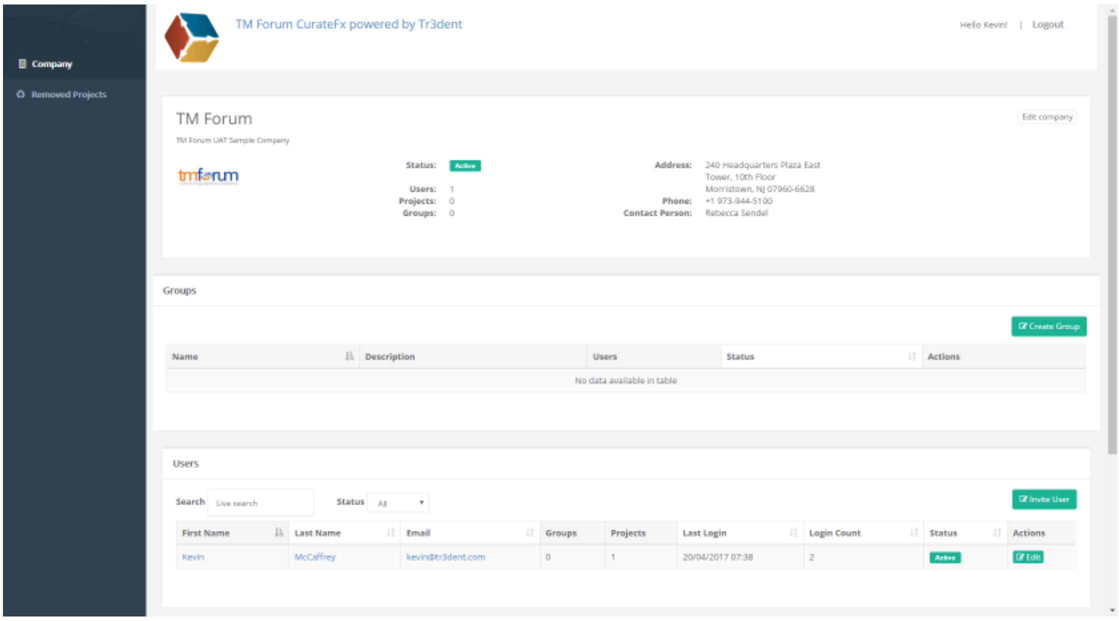
2 Company Admin Console

2.1 Accessing the Company Admin Console

The Company Admin Console is accessed through the Company Settings menu option within the Application. This menu option is only available to users that have been provided with Company Admin access.



Once selected the Company Admin Console is displayed.



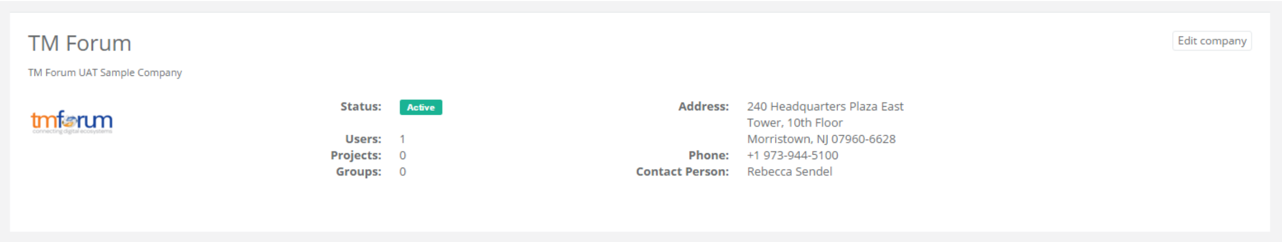
To return to the Application view click on the Company Admin Console heading.

The Company Admin Console provides two choices on the Menu Panel;

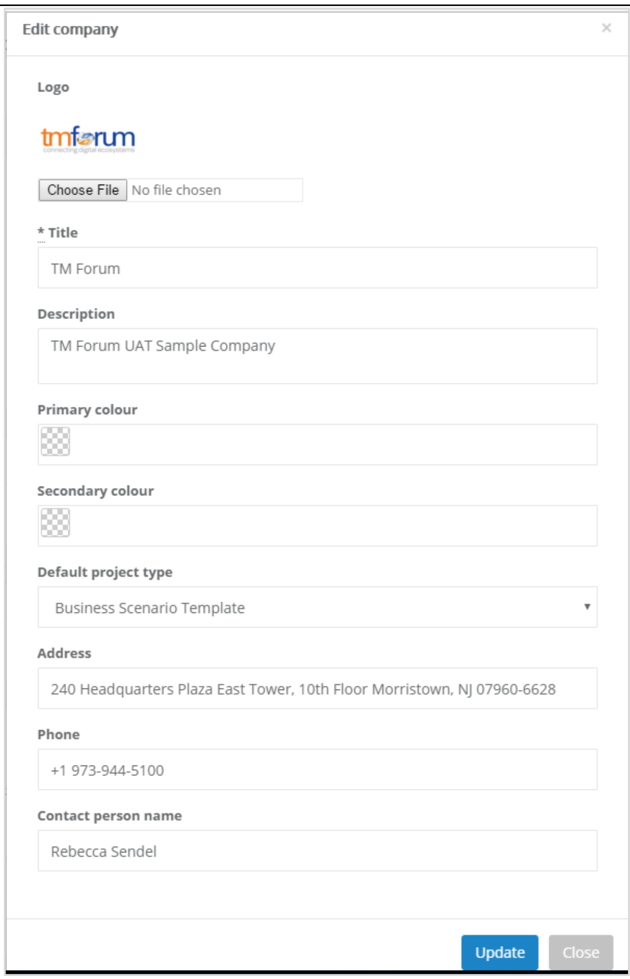
Company	Manage Company Details, Groups, Users and Project Types
Removed Projects	Restore or permanently Delete projects that were deleted by users.

3 Company

Company details can be updated using the Edit Company button in the Company Admin Console.



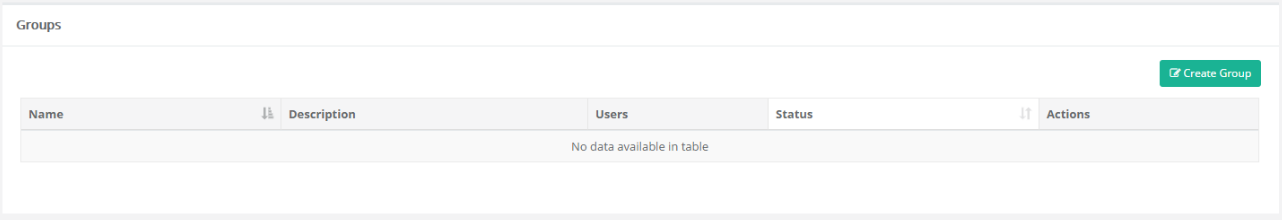
Once the Edit Company button is clicked the following is displayed;



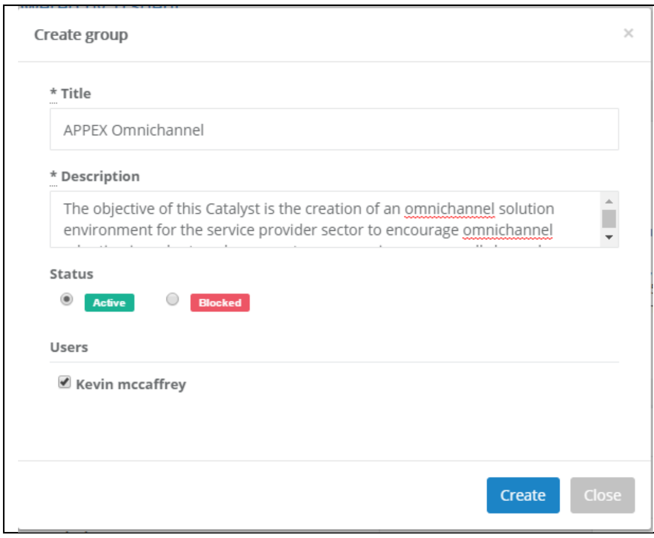
Logo: Select a Company Logo image that is used in the application menu and when a project is exported into PDF or Word formats.
Title: Company Name
Description: Description for the company
Primary Color: Used to change the color used for dialog boxes and forms.
Secondary Color: Used for secondary color purposes within the application.
Default Project Type: Set the Default Project Type used when Users create a New Project.
Address: Company Address
Phone: Contact number for company.
Contact Person Name: Name of the primary contact person within the company.

4 Groups

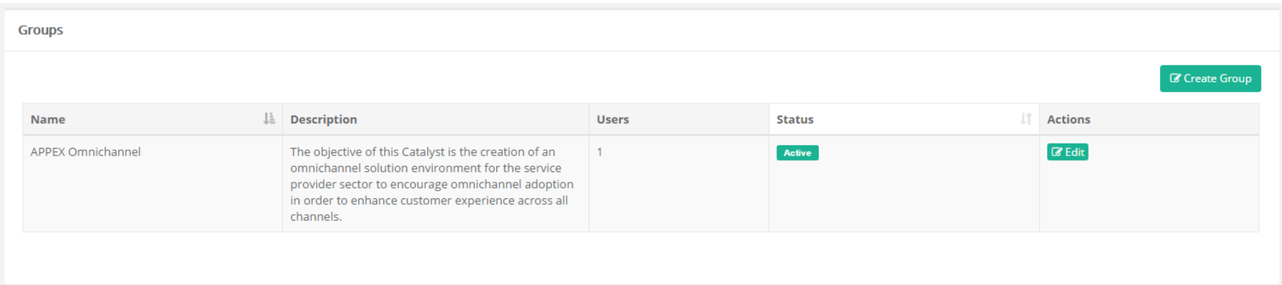
User Groups within a company are used to share projects with group member users (e.g. Catalyst Teams or Project Teams).



To create a Group, click on the Create Group button and the following is displayed;

	**Title:** The name of the Group.
	Description: Description for the Group.
	Status: Default is Active. Blocked Groups are no longer active and will not appear as a Sharing option for Users.
	Users: Assign an existing User in the Company to the Group.

Once Created the new Group will appear in the Console.

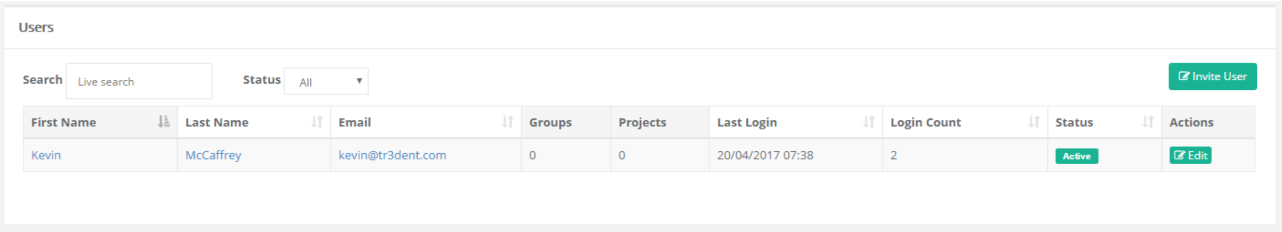


The Edit button will enable updates to be made to the Group Details.

When updates are made to a User's Group access they will automatically receive an email notifying them that their profile has changed.

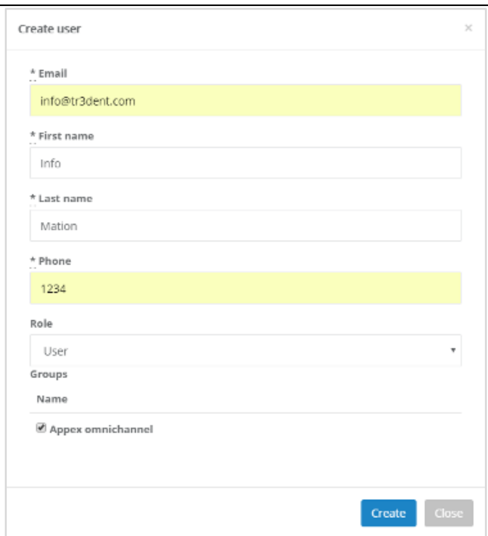
5 Users

The User section of the Console enables the Company Admin to Invite New Users to Edit details for existing users.



5.1 Invite User

To add a new User to a Company, click the Invite User button



Email: The email for the user. This must be a valid email address format and it is important that this is entered correctly as all system generated emails will be sent to this email address.

First/Last Name: First Name and Last Name for the User. This information is used in emails sent to the user.

Phone: Contact Number for User (if available).

Role: The User role is selected for Normal user. Admin role provides the user with Company Admin rights.

Groups: Select which Groups the user should be a member of.

Once the Create button is clicked the Application will automatically send an email to the User with details on how to login to the system and to set their password. It is important to Click the Create button or else no Invitation will be sent. The email is sent from CurateFx-Support@tmforum.org. Below is an example;

From: curatefx-support@tmforum.org [mailto:curatefx-support@tmforum.org]
Sent: 21 March, 2017 12:28
To: <User Email Address>
Subject: Invitation instructions to CurateFX Beta

Hi Dave ,

A couple of months ago you expressed interest in TM Forum's new Business Scenario Tool, now with an official name – CurateFx. We've received extraordinary interest in the beta program – several hundred people in fact – and are now ready to invite you to join.

To accept this invitation to become a CurateFx user please click on the link below. Please note this product is still in Beta, and only the Chrome browser is currently supported.

Accept invitation

This link will take you to the CurateFx login page where you will be prompted to set your password. And then you will be in! We have also created a series of videos to help you get started.

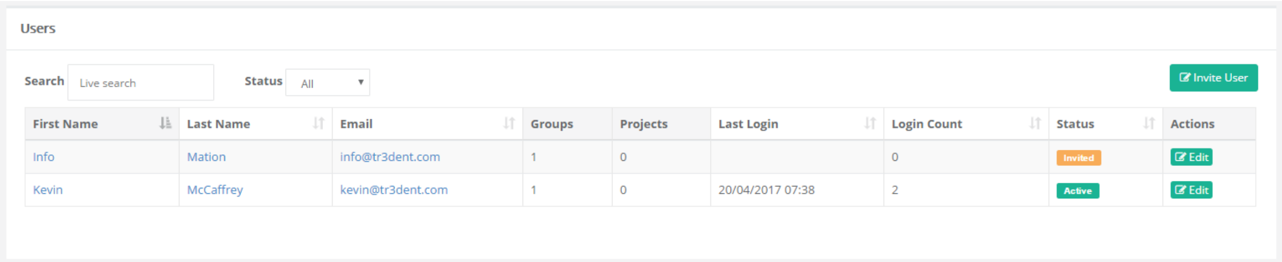
- CurateFx Introduction
- CurateFx Modules: Functionality tour
- Collaboration Capabilities and Security/Privacy in CurateFx

We hope that you enjoy all of the benefits of CurateFx. For more information on the product please visit our web page at www.tmforum.org/CurateFx.

Should you have any questions, or no longer wish to participate in the Beta, please contact us at curatefx-support@tmforum.org.

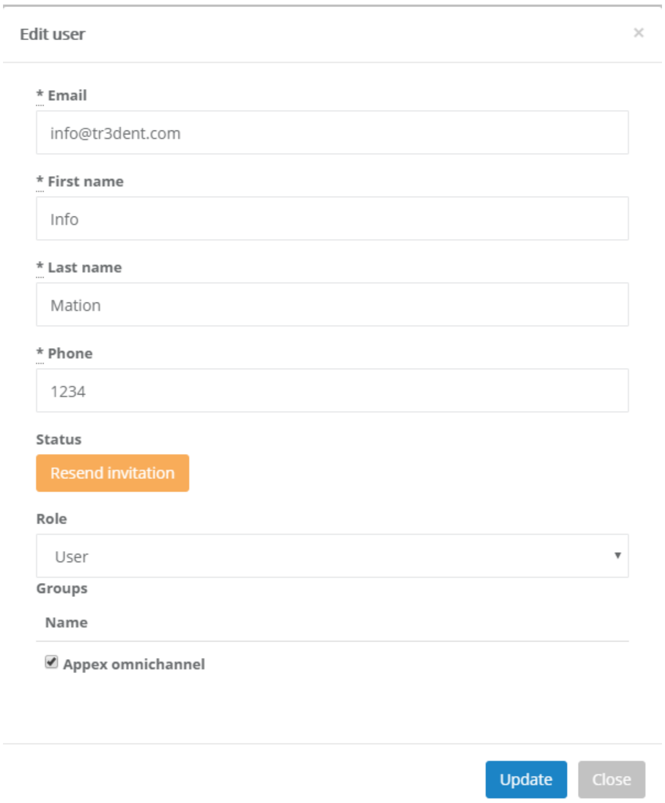
Regards and thank you for using CurateFx.
The CurateFx Team

The User section in the Console will show that the User has been invited and this status will only change to Active once the User has accepted the invitation and logged in.



5.2 Resend an Invitation

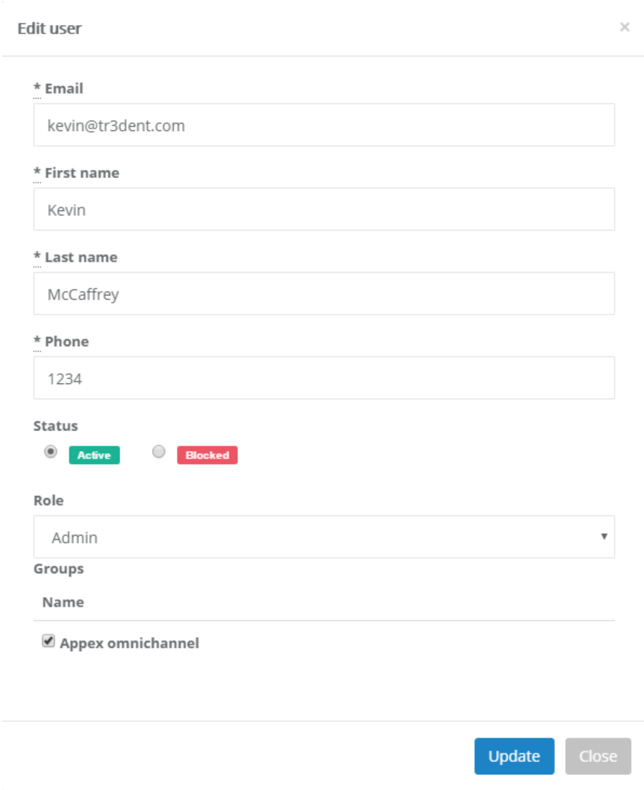
In situations where the user has not received or lost the original email invitation a new email invitation can be resent to a user. Click the Edit button for the specific user.



The Edit User form is displayed. Click the Resend Invitation and then click update to have a new Email Invitation sent to the User.

5.3 Edit User Details

To modify the details for an existing User, click the Edit User button.

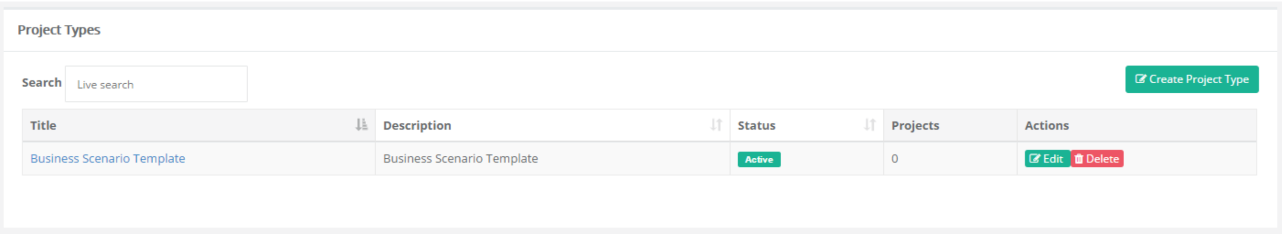


The Status of a user can be changed to Blocked, which will prevent the user from logging into the application. There is no Delete user option, so the status should be changed to Blocked when a User's access needs to be removed.

Once you have completed the updates it is necessary to then Click the Update Button.

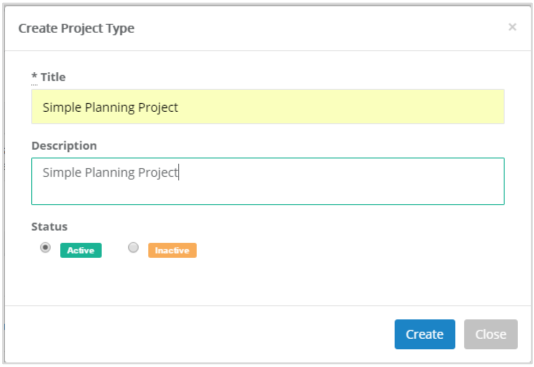
6 Project Types

A Project Type is a template that provides the users with a defined structure through sections and content (Modules) for their projects. All companies have a Blank project created which has no predefined structure and all Modules are available.

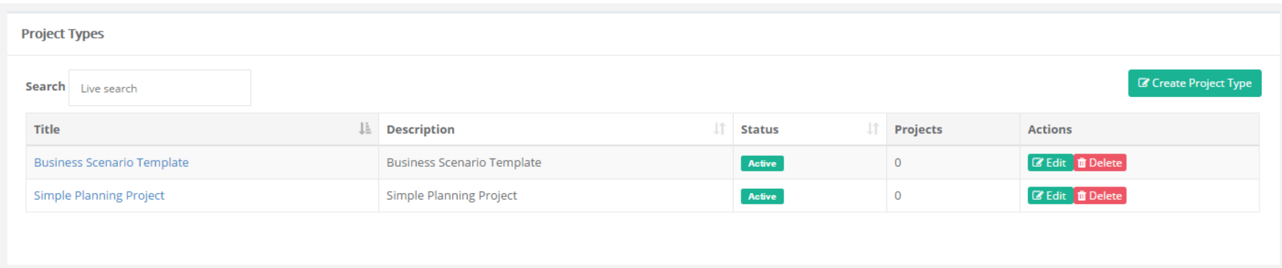


6.1 Create a New Project Type

To create a new Project Type, click the Create Project Type button

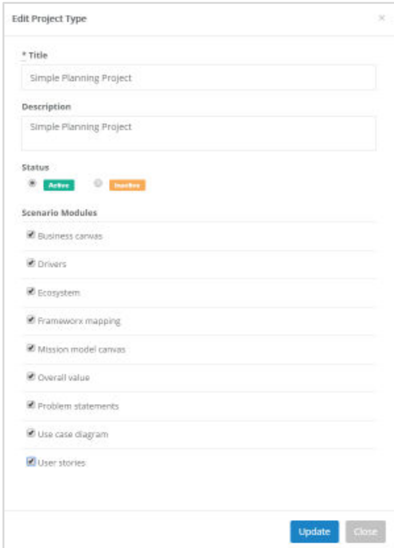


Once created the new Project Type is displayed.



6.2 Assign Modules to a Project Type

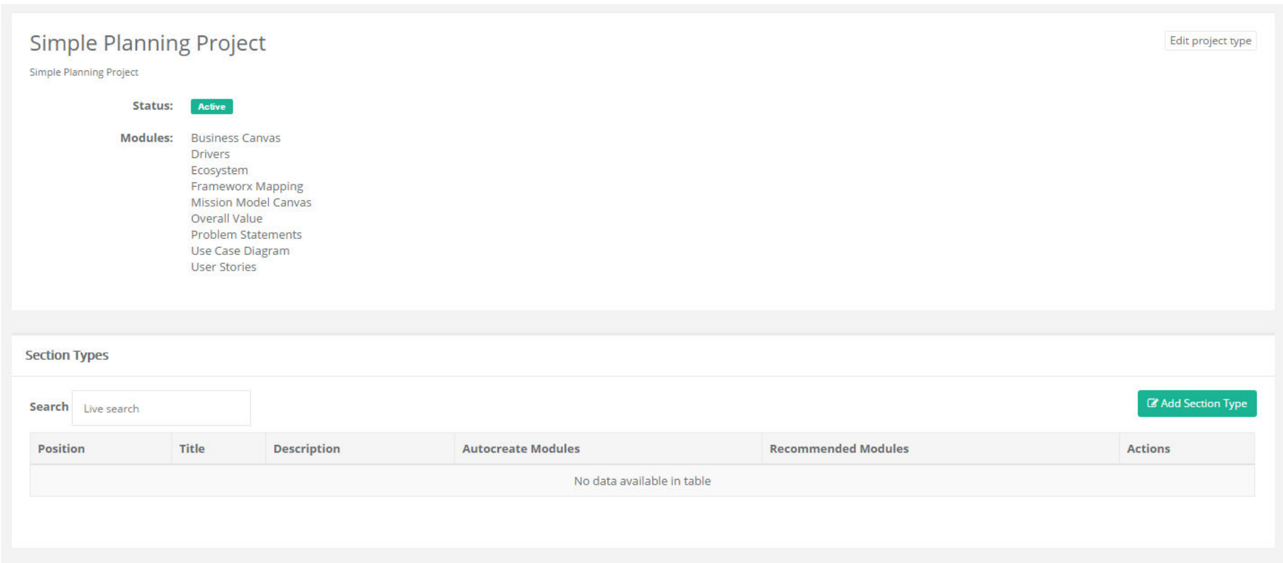
The next step is to assign which modules will be within the Project Type. Click the Edit Button and you can select which Modules are relevant for the Project Type



The list of available modules is set by the System Administrator when the Company is created.

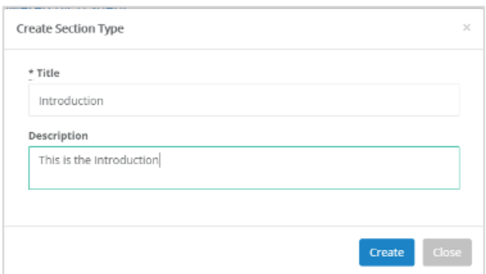
6.3 Create Sections in a Project Type

Sections provide structure to the Project Type. To create the sections for a Project Type, click on the Project Type name.

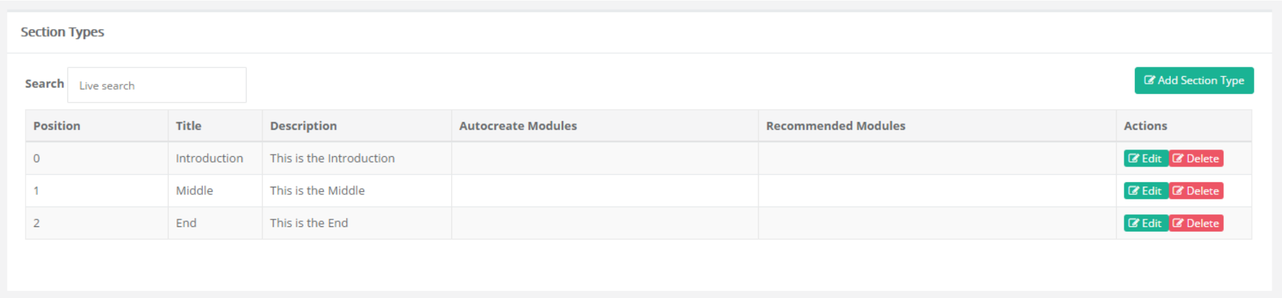


The Edit Project Type Button provides the same options as the Edit Button in the previous screen.

To add a Section, click the Add Section Type button and add the Name and Description for the new Section.



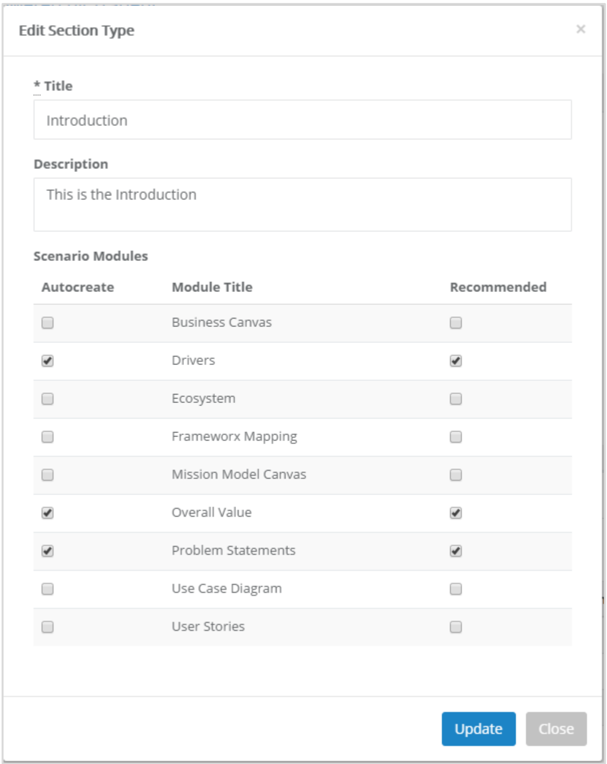
To add additional Sections, repeat the process till you have created the required number of Sections.



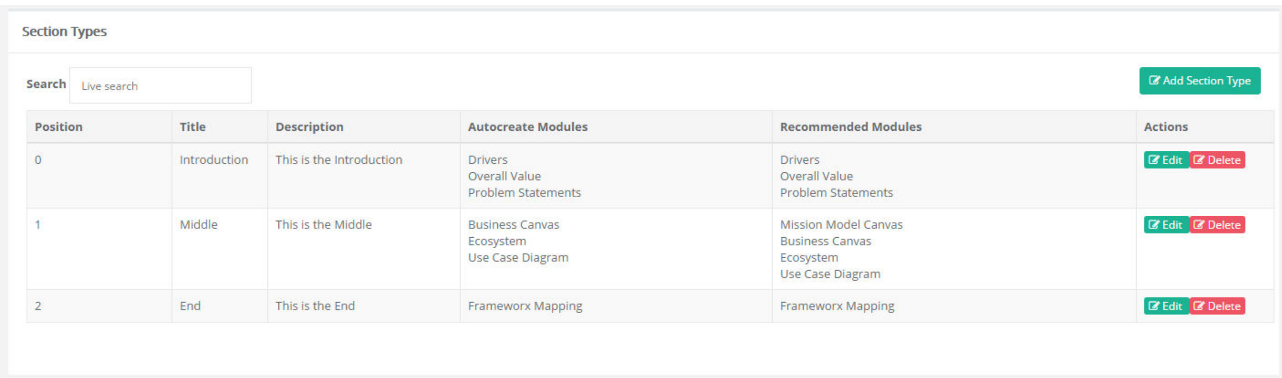
The final step in creating a Project Type is to assign which Modules should be Auto-created when the user creates a new Project using this Project Type, and also the modules that are recommended.

6.4 Assigning Modules to Sections

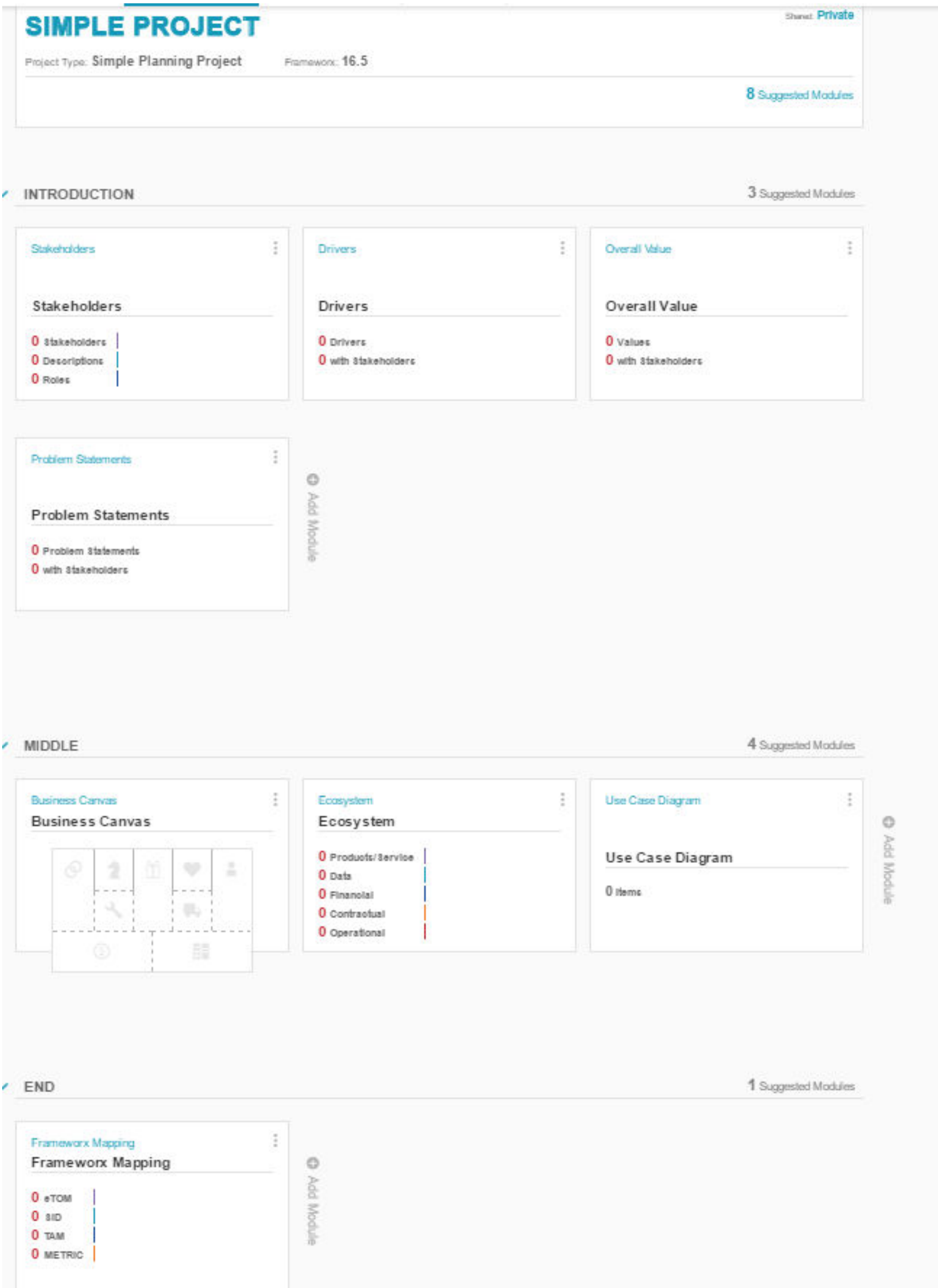
To assign a Module Click on the Edit Button for a Section. The Edit Section Type form is displayed which allows you to select which Modules should be Auto-created and/or Recommended for users of this Project Type.



If this process is repeated for the remaining two sections then the Details on the Section types will show which modules are assigned to each Section.



The following is a view of how this Project Type will be displayed when a User creates a New Project Using this Project Type.



7 FAQ

The following is a list of the common questions or issues that a Company Admin will need to handle.

7.1 User is unable to Log on

The most common reason for this problem is that the user has not yet accepted the email invitation. This can be checked by looking at the User in the Console, and if the Status displays a state of "Invited" then they have not yet logged in. Users cannot login until they have accepted the Invitation.

To correct this problem, Edit the User and Click the Resend Invitation button. This will send the user a new invitation email with the link for them to login.

7.2 User has not received the Invitation Email

There are four reasons why this could occur. Company Admins should start at the first reason and work down the list.

1. The email has been directed to the SPAM folder for the user or the user may have deleted the email. In either case Resend the Invitation and ask the user to check if it was received.
2. If not received then the TM Forum Email Administrator should be contacted to check the logs to verify that the email was sent. If the User is backlisted then this will need to be changed and then Resend the Invite.
3. If the email has been sent then the problem is most likely at the User Company's Email Server, which may be blocking the email. This has occurred for users in Oracle. In this situation, you should contact CurateFx-Admin@tr3dent.com and request that they provide the Invitation Link for the User. Once received you will then need to manually email the invitation details to the user.
4. If the TM Forum Email Administrator does not have a trace of the email in the logs then there is an issue with either CurateFx or with the Email process and a defect should be raised.

7.3 User has Forgotten their Password

Passwords can be reset by the User from the login screen. Just click on the Forgot your password option and an email will be sent to the User providing a link that will enable them to reset the password.