MANAGEMENT MANUAL

Version 1 | September 2016

Index

Introduction

The purpose of this document is to serve as a user manual for the management area of the platform. To that end, it covers all of the available features in this section, detailing them and showing examples where necessary.

Management area

Each subscription (analogous to an installation) of the platform has a section that allows users with administrative privileges to perform a large set of operations on it. Essentially, this area allows for account creation and management, as well as user creation and management.

Furthermore, this area also allows users to obtain statistics on their subscription, such as the size of each solution within that subscription.

Data isolation

One of the core principles of the platform is that data is isolated. A user can only access data he has privileges to access. This mechanic is ensured by dividing each solution in the platform in Tenants.

Each tenant has its own definition, and can be an application with a different model. An user can have access to multiple Tenants, and its privileges are defined in the context of each one.

Tenants

Each tenant corresponds to an account/application in the platform, and can be seen as the instantiation of a model for a specific end user.

There are multiple types of tenant, explained below, which allow for differentiation between different kinds of accounts.

This chapter also explains how to perform management tasks upon these tenants.

What types of tenant are there?

Type	Description
Template	Model developed in order to respond to a specific problem. Other tenants can be created based on tenants marked as templates – when a template is used to create a new tenant, all of its data is copied to the new structure.
Full	Created from a template, containing the data from it, as well as possible additional developments. Cannot be deleted unless its type is changed.
Demo	Similar to a Full tenant, but it can be deleted.

A tenant can have its type changed at any moment.

How to create a tenant?

How to access: Menu > Tenant Accounts > Create

When accessing the tenant creation option, we see a set of options that need to be filled in:

General info

- **Account short code**: Code of the tenant. Shows up in URLs.
- **Code**: Globally unique identifier (GUID) that identifies the tenant.
- **Name**: Name of the account to create, visible on all screens of the application.
- **Type**: Tenant type (see What types of tenant are there?)
- **Description:** Auxiliary text to describe the tenant's function.
- **Max No. of users**: Maximum number of users that can be created.
- **Image**: Image to associate to the account, visible on all screens of the application and in the tenant selection menu.

Administrator user account

- **Email:** Login email for the administration user.
- **Contact email:** Contact email for the administration user. Can be the same as the login email.
- **Password:** Password for the administration user. If they already exist in the platform, value is ignored unless needed for a script execution.

- **Language:** Default application language for the administration user.

Categorization

- **Group** and **Subgroup**: Used for organization purposes in the platform. See Groups and sub-groups chapter.
- **OEM**: Configuration element in the platform, which can be used to determine various graphical settings (login page logos, etc.). Also visible in the URL. See OEM chapter).

Script execution

- **Parameters**: If the template the account is being created from has a script set to execute on "Account Creation", you can use this option to pass parameters to the script – for example, if you want to load different demonstration data onto the account depending on the country it is being used in.

How to deactivate a tenant?

How to access: Menu > Tenant Accounts > List > Edit a tenant

The platform supports a deactivation function for tenants, which allows you to block access to a tenant temporarily. Common usage cases are situations where you want to disable an account, but you do not want to lose the data in it (e.g. providing a customer with a temporary demo that can be converted into a paying account).

To perform the inactivation, all that is necessary is unticking the Status – Active checkbox. If you want to reactivate it later, ticking the checkbox will make it reappear.

How to delete a tenant?

How to access: Menu > Tenant Accounts > List > Edit a tenant

The elimination of a tenant has permanent effects – it is impossible to recover an account that has been eliminated.

So that it is possible to perform this procedure, the tenant must be of a type that allows deletion (see What types of tenant are there?).

To perform this deletion, all that is necessary is pressing the Drop button on the edit screen and confirming.

How to change the maximum number of users?

How to access: Menu > Tenant Accounts > List > Edit a tenant

As soon as the number of users in a tenant (associated or created) equals the Max No. of users parameter, the platform will not allow any more user creation.

To increase this parameter, it's necessary to alter the Max No. of users parameter to the new desired limit in the edit screen.

How to update a tenant's image?

How to access: Menu > Tenant Accounts > List > Edit a tenant

It's possible to associate an image to a tenant, which will be shown in all pages of the application. The platform will ensure the image is shown with the best quality possible.

In order to perform this association, all that is necessary is to select the "Upload file…" button in the edit page and upload the image.

Recommended image size is up to 100 by 25 pixels.

Users

Each subscription of the platform has a set of users associated to it. These users are identified uniquely by their email, and have both a set of global, subscription-wide permissions, and permissions at a tenant level (not detailed in this document).

How to create a user?

How to access: Menu > Users > Register new

Accessing the Register new page displays a set of parameters that must be configured to create a user via the management area:

- **Name**: Name displayed in the UI.
- **Email**: Desired login email.
- **Password / Confirm Password**: Desired login password.
- **Language**: User's default language.
- **System Roles:** Subscription-wide roles. See How to attribute a subscription-wide role to a user?

Passwords can be left blank, and the user will receive an email at the indicated email with a randomly generated password.

How to associate a user to a tenant?

How to access: Menu > Tenant Accounts > List > Associate User

Accessing the Tenants list, it's possible to associate a user to a tenant, using the "Associate User" button. A window will be opened, in order to type in the email.

If there is no user with that email, the platform displays an option to create that user (see How to create a user?).

How to assign a subscription-wide role to a user?

How to access: Menu > Users > List > Edit a user

After creating a user, it is possible to edit their subscription-wide roles. A common usage scenario is granting permissions to a user that was created via the application or via creating a tenant with them as administrator and not in the management area.

The role selection is a multiple selection box (use SHIFT or CTRL to select multiple roles), with the following available roles:

- **Administrator**: Has access to the management and modeling areas.
- **Provisioning:** Has access to the management area.
- **Modeler:** Has access to the modeling area.
    - The modeler role also requires the definition of a set of tenants where the user will have modeling privileges. These are the only ones that will appear when they access the modeler.

Connectors

A connector is a piece of software that is used for the platform to communicate with external systems. It consists of a license file, which is used for authentication on the platform, and a GUID.

How to create a connector?

How to access: Menu > Connectors > Create

Creating a connector via the management interface is just a matter of selecting a name for it, and identifying all the tenants you want to have access to that connector.

The GUID and license file will be automatically generated.

How to associate an already existing connector to a tenant?

How to access: Menu > Connectors > List > Edit a connector

To associate a connector to more tenants, all you have to do is to select it and use the Tenants section to add all the tenants you want the connector to be available in.

How to create a new license file for a connector?

How to access: Menu > Connectors > List > Edit a connector

It is possible to generate a new license file for a connector, if you want to force users to reobtain the license file without having to change any other configurations.

To do this, pressing the “Generate new license” button when editing a tenant and confirming will generate the new license. Every instance of the connector will need the new License.lic file.

Groups and subgroups

Groups and subgroups are organizational figures in the platform that allow users to organize their tenants.

How to create a group?

How to access: Menu > Groups > Create

All that is necessary to create a Group is a Code and a Name. The Code cannot have any special characters.

How to create a subgroup?

How to access: Menu > Sub Groups > Create

In order to create a sub group, it is necessary to provide both a Code and a Name, as well as identify the group it is defined under.

How to associate a tenant to a group/subgroup?

How to access: Menu > Tenant Accounts > List > Edit a tenant

When creating a tenant, it is necessary to define its group and sub group. However, if you create a group or subgroup and want to edit a tenant to use them, it is possible to do so at any time by editing the tenant and, in the Categorization section, make the change.

OEM

An OEM is a configuration unit of the platform that allows users to define a set of parameters to customize display aspects for a given set of tenants. For example, if you have a subscription of the platform which is used by several companies, each one of them may want to have different images and text.

How to create an OEM?

How to access: Menu > OEM Brands > Create

In the creation menu, the OEM Brand is identified by a unique Code, and also has a name and description.

Here we can define a set of images that are associated to the OEM brand. These images are defined based on:

- **Size**: Large, Medium and Small – each of these images is used in different places on the platform.
- **Color:** Each image has a Dark and Light version, depending on the contrast necessary for where it is going to be used – e.g., Dark will be used in places where the background is dark.
- **Language:** The platform supports defining a different image for each supported language.

How to create a product?

How to access: Menu > OEM Brands > Create or Edit

A further customization that can be done in an OEM Brand is a Product. The product identifies a specific solution inside an OEM brand. Each product has a Name and a Description, and its configuration is the same as How to create an OEM?

How to configure a landing page?

How to access: Menu > Landing Pages > Create

Each OEM brand (or product within it) can have a customized landing page on the platform. The pages for the OEM brands can be accessed by adding the code to the subscription's URL.

These configurations determine what the user sees when they access the corresponding page: titles, descriptions, contact information for demonstrations, text describing the platform and social media accounts.

It is possible to use HTML and display YouTube embedded videos in the **Spotlight Code** attribute, as well as use HTML tags in the "What Is" content texts.

The pages for the products are automatically added as a reference to the main landing page.

The following attributes are configurable in the **Details** section:

- **OEM Brand / Product**: Identify the OEM Brand and Product.

- **Language:** Each desired language must have its separate configuration for the landing page.
- **Page Title:** Title of the web page.
- **Title:** Title to identify the landing page in the list.
- **Description:** Description to display in the landing page (below the logo).
- **Spotlight Code:** URL to a YouTube video or similar content you want to display.
- **Information Contact Email/Text:** Text to display in the “More Info” section of the page, and email that is contacted when users want more info.
- **Demo Contact Email/Text:** Text to display in the “Demo” section of the page, and email that is contacted when users want a demo.
- **Default:** Is the default landing page or not.

The **What Is** section is the main content that can be displayed in the landing page. It can be configured utilizing HTML code, and is designed to be either a two-column or single-column text layout.

The **Social Accounts** section allows you to configure social media account URLs for the given product or OEM brand.