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User Management

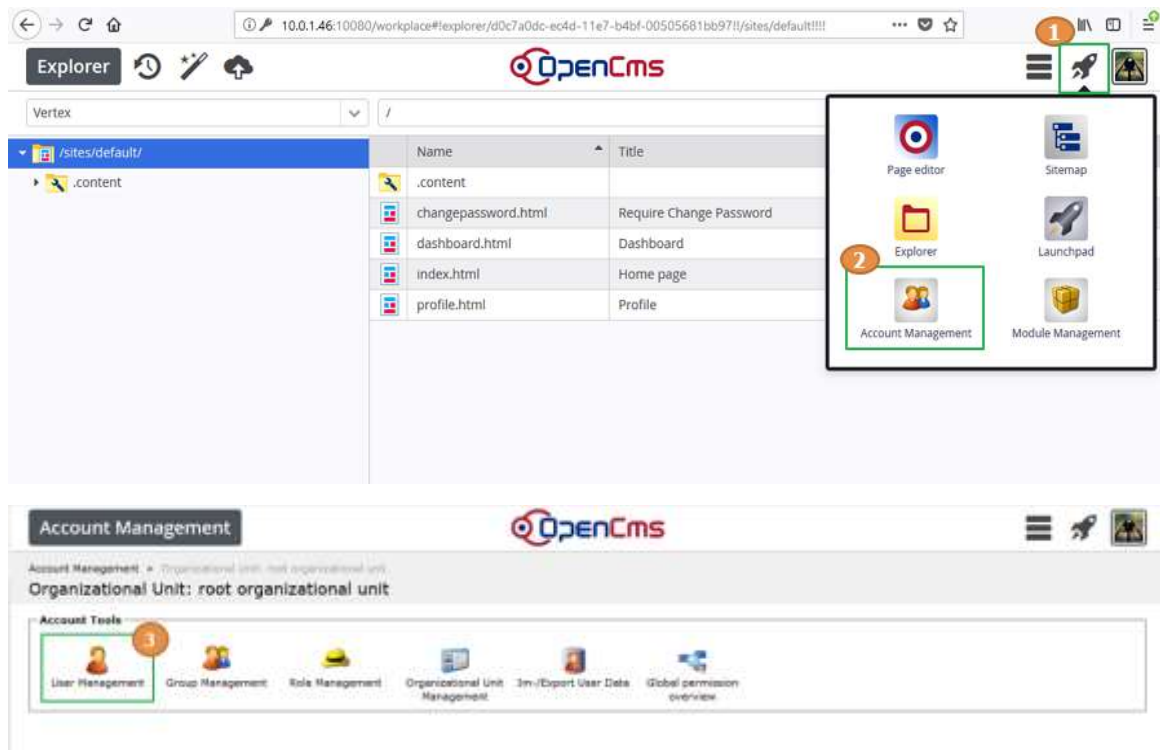
How to Add a user

1. Step 1: Login to Admin page (Open Cms)

1. Go to Vertex admin website
2. Input username/password
3. Login

2. Step 2:

1. Click on “Quick launch” icon on top right corner to open popup
2. Click on “Account Management” icon on popup
3. Click on “User Management” icon to redirect to User Management page



3. Step 3: User management page will display as below:

1. Click on “New User” icon to redirect to New User page
2. List user account to edit or delete user

Account Management

Account Management > Organizational Unit: root organizational unit > User Management: root organizational unit

User Management: root organizational unit

User Actions

New User

User Accounts

User Accounts (23)

Search

Address Groups Roles Print

Delete Activate Deactivate

E	G	R	A	D	Login ^A	User Name	Email	Last Login	
					Admin	Administrator ROOT (Admin)	sac.le@sutrixsolutions.com	Jan 17, 2018 at 10:25 AM	<input type="checkbox"/>
					Export	(Export)		Never	<input type="checkbox"/>
					Guest	(Guest)		Never	<input type="checkbox"/>
					Qc_123@sutrixsolution.com	qc1 qc1 (Qc_123@sutrixsolution.com)	qc_partner1@sutrixsolution.com	Never	<input type="checkbox"/>
					an.mvt@sutrixsolutions.com	An MVT (an.mvt@sutrixsolutions.com)	an.mvt@sutrixsolutions.com	Never	<input type="checkbox"/>
					anh.bui@sutrixsolutions.com	Test 123456789 Anh (anh.bui@sutrixsolutions.com)	anh.bui@sutrixsolutions.com	Jan 16, 2018 at 3:40 PM	<input type="checkbox"/>
					cuong.vt@sutrixsolutions.com	Vo Cuong (cuong.vt@sutrixsolutions.com)	cuong.vt@sutrixsolutions.com	Jan 16, 2018 at 3:19 PM	<input type="checkbox"/>
					gggg@sutrix.com	Huy Huy (gggg@sutrix.com)	gggg@sutrix.com	Never	<input type="checkbox"/>
					giahuy	huy huy (giahuy)	huy.lg@sutrixsolutions.com	Never	<input type="checkbox"/>
					hanh.hong@sutrixsolutions.com	Hanh Hong (hanh.hong@sutrixsolutions.com)	hanh.hong@sutrixsolutions.com	Jan 16, 2018 at 2:46 PM	<input type="checkbox"/>
					hanhglobedtest2@gmail.com	hanh hong hanh (hanhglobedtest2@gmail.com)	hanhglobedtest2@gmail.com	Jan 17, 2018 at 10:33 AM	<input type="checkbox"/>
					hanhglobedtest7@gmail.com	Hong Hanh (hanhglobedtest7@gmail.com)	hanhglobedtest7@gmail.com	Jan 2, 2018 at 6:00 PM	<input type="checkbox"/>
					qc_admin1@sutrixsolution.com	qc1 qc1 (qc_admin1@sutrixsolution.com)	qc_admin1@sutrixsolution.com	Jan 17, 2018 at 10:32 AM	<input type="checkbox"/>
					qc_admin2@sutrixsolution.com	qc2 qc2 (qc_admin2@sutrixsolution.com)	qc_admin2@sutrixsolution.com	Never	<input type="checkbox"/>
					qc_admin3@sutrixsolution.com	qc3 qc3 (qc_admin3@sutrixsolution.com)	qc_admin3@sutrixsolution.com	Never	<input type="checkbox"/>
					qc_investment-managers1@sutrixsolution.com	qc1 qc1 (qc_investment-managers1@sutrixsolution.com)	qc_investment-managers1@sutrixsolution.com	Never	<input type="checkbox"/>
					qc_investment-managers2@sutrixsolution.com	qc2 qc2 (qc_investment-managers2@sutrixsolution.com)	qc_investment-managers2@sutrixsolution.com	Never	<input type="checkbox"/>
					qc_investment-managers3@sutrixsolution.com	qc3 qc3 (qc_investment-managers3@sutrixsolution.com)	qc_investment-managers3@sutrixsolution.com	Never	<input type="checkbox"/>
					qc_partner1@sutrixsolution.com	qc1 qc1 (qc_partner1@sutrixsolution.com)	qc_partner1@sutrixsolution.com	Never	<input type="checkbox"/>
					qc_partner2@sutrixsolution.com	qc2 qc2 (qc_partner2@sutrixsolution.com)	qc_partner2@sutrixsolution.com	Never	<input type="checkbox"/>
					qc_partner3@sutrixsolution.com	qc3 qc3 (qc_partner3@sutrixsolution.com)	qc_partner3@sutrixsolution.com	Never	<input type="checkbox"/>
					test1@yopmail.com	Anh Bui (test1@yopmail.com)	test1@yopmail.com	Jan 16, 2018 at 4:18 PM	<input type="checkbox"/>
					thong.tv@sutrixsolutions.com	Tran Thong (thong.tv@sutrixsolutions.com)	thong.tv@sutrixsolutions.com	Jan 16, 2018 at 5:50 PM	<input type="checkbox"/>

4. Step 4: Add a new user

1. Login name (mandatory): input email into this field

Note: This field must be the same as the email field (4) to log in at Client site

2. Last name (mandatory): input name into this field
3. First name (mandatory): input name into this field
4. Email (mandatory): input email into this field

Note: an email address must have only letters and numbers and exact one "@" symbol, followed by at least one dot

5. Add icon: click on it displays corresponding field to add content

+ Description: input description

+ Entity: input entity into this field to display Client site

6. Group: click on group icon, this section will display as below:



+ Choose any group to add for a user

Note: we have 2 role for user group as below: (if choose all that it will get “investment-manager” role to display Client site)

Persona (User group)	Portfolio	Team Profiles	Network Contacts (Non-LP)	Network Contacts (LP)
Investment Managers	X	X	X	
General partner, Partners, Managing partners	X	X	X	X
Admin	X	X	X	X

7. Password (mandatory): input a password to login at Client site

8. Password confirmation (mandatory): input a password must be the same Password field (7)

Note: Password and Password confirmation have at least 8 characters and the same

9. Save: click on it that all value will be saved

10. Cancel: click on it to redirect previous page

Account Management
OpenCms

Account Management > Organizational Unit: root organizational unit > User Management: root organizational unit > New User

New User

Identification

Login name:
Description:
Last name:
First name:
Email:
Organizational unit: root organizational unit

Entity

entity:

Settings

Language:
Site:
Project:
Start folder:
Start View:
Group:
Role:

Authentication

Enabled: ☒
Self management: ☒
Password:
Password Confirmation:

The page will show at Client site after input:

- If the role is “investment-manager” or all roles will show as below:

Portfolio

+ NEW ENTRY EDIT/DELETE

Hide fields Filter Grouped by 1 field Sort

Company Name	Company Description	Location
VVSEAI	VERTEX ENTITY	Count 11
1 AT	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed...	India
2 AA	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed...	Singapore India
3 CC	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed...	US Singapore India
4 F	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed...	US India
5 G	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed...	Singapore Malaysia India
6 HF	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed...	Indonesia Thailand Mal
7 HJ	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed...	India
8 I	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed...	India Singapore
9 M	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed...	Singapore Taiwan
10 PS	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed...	US UK China Singapo
11		

11 records

Airtable

29 Dec 2017
Companies: AT, AA, CC Anh, updated Portfolio

- If the role is “General partner, Partners, Managing partners or Admin” will show as below:



again again anhtest 123

VERTEX EMAIL ADDRESS

anhtest123@yopmail.com

VERTEX ENTITY

HC

5

PASSWORD

CHANGE YOUR PASSWORD

Information disclosed on this website is proprietary to Vertex Venture Holdings.

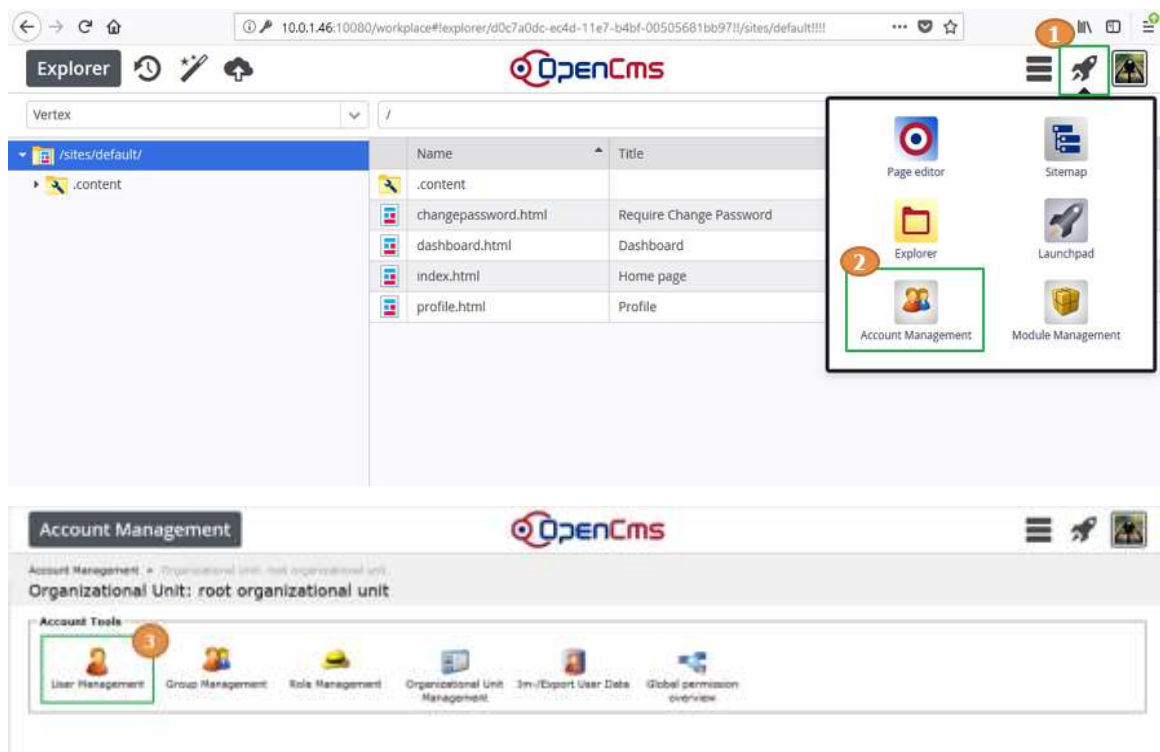
How to Edit a user

1. Step 1: Login to Admin page (Open Cms)

1. Go to Vertex admin website
2. Input username/password
3. Login

2. Step 2:

1. Click on “Quick launch” icon on top right corner to open popup
2. Click on “Account Management” icon on popup
3. Click on “User Management” icon to redirect to User Management page



3. Step 3: User management page will display as below:

1. Click on “New User” icon to redirect to New User page
2. List user account to edit or delete user

Account Management

OpenCms

Account Management > Organizational Unit: root organizational unit > User Management: root organizational unit

User Management: root organizational unit

User Actions

1

User Accounts

User Accounts (23)

Address

Groups

Roles

Print

Delete

Activate

Deactivate

E	G	R	A	D	Login ^h	User Name	Email	Last Login	
					Admin	Administrator ROOT (Admin)	sac.le@sutrixsolutions.com	Jan 17, 2018 at 10:25 AM	<input type="checkbox"/>
					Export	(Export)		Never	<input type="checkbox"/>
					Guest	(Guest)		Never	<input type="checkbox"/>
					QC_123@sutrixsolution.com	qc1 qc1 (QC_123@sutrixsolution.com)	qc_partner1@sutrixsolution.com	Never	<input type="checkbox"/>
					an.nvt@sutrixsolutions.com	An NVT (an.nvt@sutrixsolutions.com)	an.nvt@sutrixsolutions.com	Never	<input type="checkbox"/>
					anh.bui@sutrixsolutions.com	Test 123456789 Anh (anh.bui@sutrixsolutions.com)	anh.bui@sutrixsolutions.com	Jan 16, 2018 at 3:40 PM	<input type="checkbox"/>
					cuong.vt@sutrixsolutions.com	Vo Cuong (cuong.vt@sutrixsolutions.com)	cuong.vt@sutrixsolutions.com	Jan 16, 2018 at 3:19 PM	<input type="checkbox"/>
					gggg@sutrix.com	Huy Huy (gggg@sutrix.com)	gggg@sutrix.com	Never	<input type="checkbox"/>
					giahuy	huy huy (giahuy)	huy.lg@sutrixsolutions.com	Never	<input type="checkbox"/>
					hanh.hong@sutrixsolutions.com	Hanh Hong (hanh.hong@sutrixsolutions.com)	hanh.hong@sutrixsolutions.com	Jan 16, 2018 at 2:46 PM	<input type="checkbox"/>
					hanhglobedtest2@gmail.com	Hanh Hong hanh (hanhglobedtest2@gmail.com)	hanhglobedtest2@gmail.com	Jan 17, 2018 at 10:33 AM	<input type="checkbox"/>
					hanhglobedtest7@gmail.com	Hong Hanh (hanhglobedtest7@gmail.com)	hanhglobedtest7@gmail.com	Jan 2, 2018 at 6:00 PM	<input type="checkbox"/>
					qc_admin1@sutrixsolution.com	qc1 qc1 (qc_admin1@sutrixsolution.com)	qc_admin1@sutrixsolution.com	Jan 17, 2018 at 10:32 AM	<input type="checkbox"/>
					qc_admin2@sutrixsolution.com	qc2 qc2 (qc_admin2@sutrixsolution.com)	qc_admin2@sutrixsolution.com	Never	<input type="checkbox"/>
					qc_admin3@sutrixsolution.com	qc3 qc3 (qc_admin3@sutrixsolution.com)	qc_admin3@sutrixsolution.com	Never	<input type="checkbox"/>
					qc_investment-managers1@sutrixsolution.com	qc1 qc1 (qc_investment-managers1@sutrixsolution.com)	qc_investment-managers1@sutrixsolution.com	Never	<input type="checkbox"/>
					qc_investment-managers2@sutrixsolution.com	qc2 qc2 (qc_investment-managers2@sutrixsolution.com)	qc_investment-managers2@sutrixsolution.com	Never	<input type="checkbox"/>
					qc_investment-managers3@sutrixsolution.com	qc3 qc3 (qc_investment-managers3@sutrixsolution.com)	qc_investment-managers3@sutrixsolution.com	Never	<input type="checkbox"/>
					qc_partner1@sutrixsolution.com	qc1 qc1 (qc_partner1@sutrixsolution.com)	qc_partner1@sutrixsolution.com	Never	<input type="checkbox"/>
					qc_partner2@sutrixsolution.com	qc2 qc2 (qc_partner2@sutrixsolution.com)	qc_partner2@sutrixsolution.com	Never	<input type="checkbox"/>
					qc_partner3@sutrixsolution.com	qc3 qc3 (qc_partner3@sutrixsolution.com)	qc_partner3@sutrixsolution.com	Never	<input type="checkbox"/>
					test1@yopmail.com	Anh Bui (test1@yopmail.com)	test1@yopmail.com	Jan 16, 2018 at 4:18 PM	<input type="checkbox"/>
					thong.tv@sutrixsolutions.com	Tran Thong (thong.tv@sutrixsolutions.com)	thong.tv@sutrixsolutions.com	Jan 16, 2018 at 5:50 PM	<input type="checkbox"/>

4. Step 4: Click on any user of User account to Edit User page

1. Click on “Edit User” icon to redirect to Edit User page
2. Edit content which you want to edit (ex. Last name, First name, ...)
3. Save: click on it that new value will save successful
4. Cancel: click on it to redirect to previous page

Account Management

Account Management > Organizational Unit: root organizational unit > User Management: root organizational unit > User Overview: anhtest123@yopmail.com

User Overview: anhtest123@yopmail.com

User Actions

1

Edit User

Edit Groups of the User

Edit User Roles

Permissions Overview

Edit Additional Info

Switch User

Delete User

Kill sessions

Identification

Login name: anhtest123@yopmail.com
Description: test description
Last name: anhtest 123
First name: again again
Email: anhtest123@yopmail.com
Organizational unit: root organizational unit

Entity

entity: HC

Authentication

Enabled: True
Self management: True
Last time logged in: Jan 22, 2018 at 4:42 PM
Created: Jan 19, 2018 at 2:51 PM

Account Management

Account Management > Organizational Unit: root organizational unit > User Management: root organizational unit > User Overview: anhtest123@yopmail.com > Edit User: anhtest123@yopmail.com

Edit User: anhtest123@yopmail.com

Identification

Login name: anhtest123@yopmail.com
Description:
Last name:
First name:
Email:
Organizational unit: root organizational unit

Entity

entity:

Settings

Language:
Site:
Project:
Start folder:
Start View:

Authentication

Enabled: ☒
Self management: ☒
Password:
Password Confirmation:

3

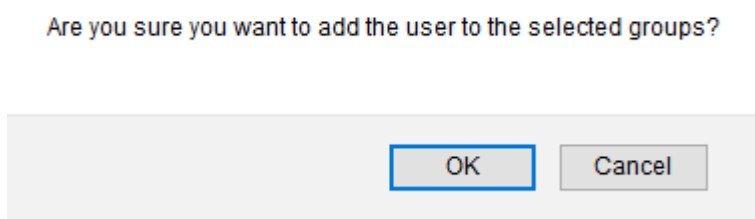
OK

Cancel

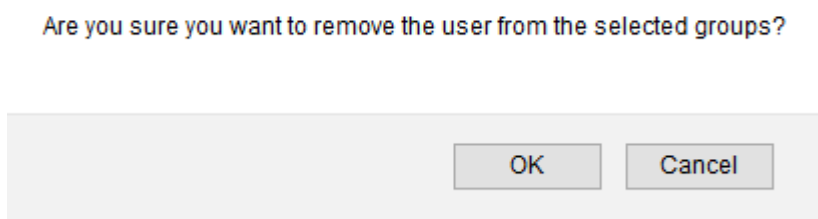
4

5. Step 5: Edit Groups of the user

1. Click on “Edit Groups of the user” icon to redirect to Edit Groups of the User page
2. Click on any checkbox of Available Groups column which you want to add the group for the user
3. Click on “Add” icon of Available Groups column, the confirm popup will appear to ask user “OK” or “Cancel”



- If click on “OK” button on popup to add to User Groups column
 - If click on “Cancel” button on popup, it will close confirm popup
4. Group of the user added at User Groups column
 - If you want to delete group user that click on any checkbox of User Groups column
 5. Click on “Remove” icon of User Groups column, the confirm popup will appear to ask user “OK” or “Cancel”



- If click on “OK” button on popup to delete group user at User Groups column
- If click on “Cancel” button on popup, it will close confirm popup

Account Management

Account Management > Organizational Unit: root organizational unit > User Management: root organizational unit > User Overview: anhtest123@yopmail.com

User Overview: anhtest123@yopmail.com

User Actions

Edit User

1

Edit Groups of the User

Edit User Roles

Permissions Overview

Edit Additional Info

Switch User

Delete User

Kill sessions

Identification

Login name: anhtest123@yopmail.com
Description: test description
Last name: anhtest 123
First name: again again
Email: anhtest123@yopmail.com
Organizational unit: root organizational unit

Entity

entity: HC

Authentication

Enabled: True
Self management: True
Last time logged in: Jan 22, 2018 at 5:19 PM
Created: Jan 19, 2018 at 2:51 PM

Account Management

Account Management > Organizational Unit: root organizational unit > User Management: root organizational unit > User Overview: anhtest123@yopmail.com > Edit Groups of the User: anhtest123@yopmail.com

Edit Groups of the User: anhtest123@yopmail.com

Identification

Login name: anhtest123@yopmail.com
Last name: anhtest 123
First name: again again
Organizational unit: root organizational unit

User Groups

User Groups (2)

5

Print

Remove

G	A	Name ^a	Description	
	<input checked="" type="checkbox"/>	admin	Admin	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Users	users group	<input type="checkbox"/>

4

Available Groups

Available Groups (6)

3

Print

Add

G	A	Name ^a	Description	
	<input type="checkbox"/>	Administrators	administrators group	<input type="checkbox"/>
	<input type="checkbox"/>	General partner	General partner	<input type="checkbox"/>
	<input type="checkbox"/>	Guests	guests group	<input type="checkbox"/>
	<input type="checkbox"/>	investment-managers	Investment Managers	<input type="checkbox"/>
	<input type="checkbox"/>	Managing partners	Managing partners	<input type="checkbox"/>
	<input type="checkbox"/>	partner	General partner, Partners, Managing partners	<input type="checkbox"/>

2

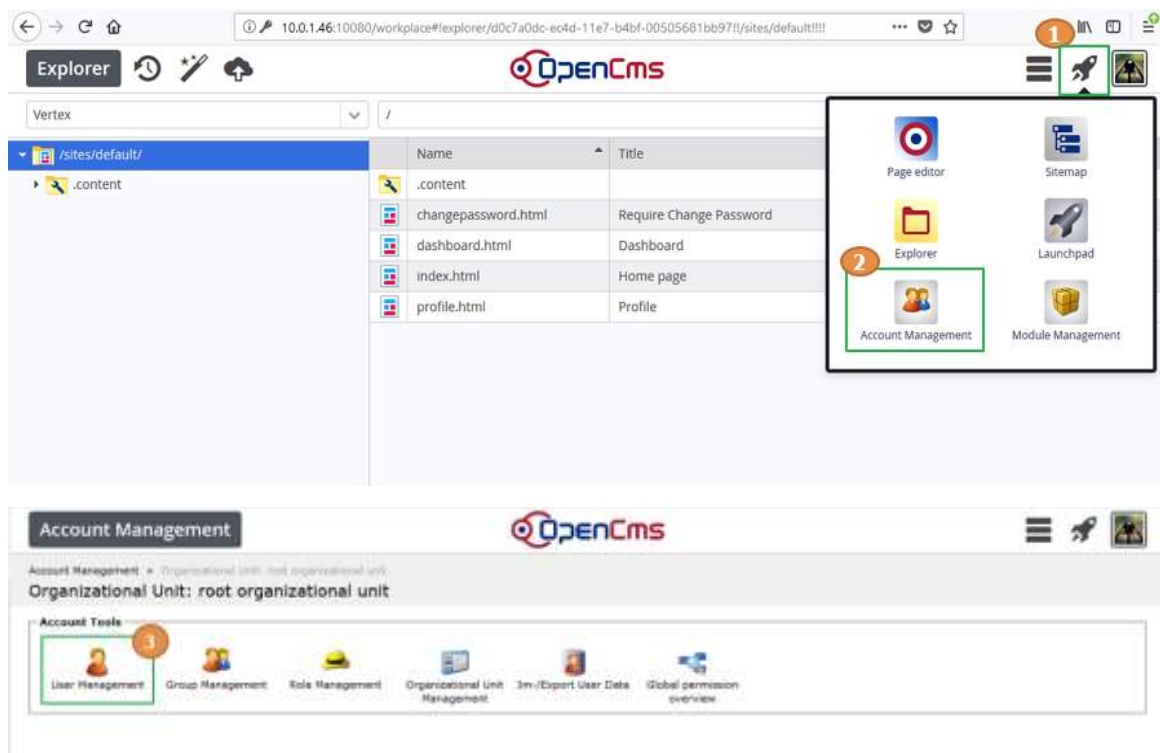
How to Delete user

1. Step 1: Login to Admin page (Open Cms)

1. Go to Vertex admin website
2. Input username/password
3. Login

2. Step 2:

1. Click on “Quick launch” icon on top right corner to open popup
2. Click on “Account Management” icon on popup
3. Click on “User Management” icon to redirect to User Management page



3. Step 3: Delete user

3.1 Delete a user:

1. Click on “New User” icon to redirect to New User page
2. Click on any user of User Actions which you to delete
3. Click on “Delete user” icon to redirect to Delete user page
4. Click on “Delete” button to delete user
5. Click on “Cancel” button to redirect to previous page

The screenshot displays the OpenCMS Account Management interface. At the top, there's a navigation bar with "Account Management" and "OpenCMS" logo. Below it, a breadcrumb trail shows "Account Management > Organizational Unit: root organizational unit > User Management: root organizational unit". The main content area is titled "User Management: root organizational unit".

Under the "User Actions" section, there's a "New User" icon labeled with a red circle containing the number 1. Below this is the "User Accounts" section, which contains a table of 23 user accounts. The table has columns for "E", "G", "R", "A", "D", "Login", "User Name", "Email", and "Last Login". A red circle with the number 2 highlights the "Delete" icon in the "User Actions" column of the first row (Administrator ROOT (Admin)).

E	G	R	A	D	Login	User Name	Email	Last Login
					Admin	Administrator ROOT (Admin)	sac.le@sutrixsolutions.com	Jan 17, 2018 at 10:25 AM
					Export	(Export)		Never
					Guest	(Guest)		Never
					qc_123@sutrixsolution.com	qc1 qc1 (qc_123@sutrixsolution.com)	qc_partner1@sutrixsolution.com	Never
					an.nvt@sutrixsolutions.com	An NVT (an.nvt@sutrixsolutions.com)	an.nvt@sutrixsolutions.com	Never
					anh.bui@sutrixsolutions.com	Test 123456789 Anh (anh.bui@sutrixsolutions.com)	anh.bui@sutrixsolutions.com	Jan 16, 2018 at 3:40 PM
					cuong.vt@sutrixsolutions.com	Vo Cuong (cuong.vt@sutrixsolutions.com)	cuong.vt@sutrixsolutions.com	Jan 16, 2018 at 3:19 PM
					gggg@sutrix.com	Huy Huy (gggg@sutrix.com)	gggg@sutrix.com	Never
					giahuy	huy huy (giahuy)	huy.lg@sutrixsolutions.com	Never
					hanh.hong@sutrixsolutions.com	Hanh Hong (hanh.hong@sutrixsolutions.com)	hanh.hong@sutrixsolutions.com	Jan 16, 2018 at 2:46 PM
					hanhglobedtest2@gmail.com	hanh hong hanh (hanhglobedtest2@gmail.com)	hanhglobedtest2@gmail.com	Jan 17, 2018 at 10:33 AM
					hanhglobedtest7@gmail.com	Hong Hanh (hanhglobedtest7@gmail.com)	hanhglobedtest7@gmail.com	Jan 2, 2018 at 6:00 PM
					qc_admin1@sutrixsolution.com	qc1 qc1 (qc_admin1@sutrixsolution.com)	qc_admin1@sutrixsolution.com	Jan 17, 2018 at 10:32 AM
					qc_admin2@sutrixsolution.com	qc2 qc2 (qc_admin2@sutrixsolution.com)	qc_admin2@sutrixsolution.com	Never
					qc_admin3@sutrixsolution.com	qc3 qc3 (qc_admin3@sutrixsolution.com)	qc_admin3@sutrixsolution.com	Never
					qc_investment-managers1@sutrixsolution.com	qc1 qc1 (qc_investment-managers1@sutrixsolution.com)	qc_investment-managers1@sutrixsolution.com	Never
					qc_investment-managers2@sutrixsolution.com	qc2 qc2 (qc_investment-managers2@sutrixsolution.com)	qc_investment-managers2@sutrixsolution.com	Never
					qc_investment-managers3@sutrixsolution.com	qc3 qc3 (qc_investment-managers3@sutrixsolution.com)	qc_investment-managers3@sutrixsolution.com	Never
					qc_partner1@sutrixsolution.com	qc1 qc1 (qc_partner1@sutrixsolution.com)	qc_partner1@sutrixsolution.com	Never
					qc_partner2@sutrixsolution.com	qc2 qc2 (qc_partner2@sutrixsolution.com)	qc_partner2@sutrixsolution.com	Never
					qc_partner3@sutrixsolution.com	qc3 qc3 (qc_partner3@sutrixsolution.com)	qc_partner3@sutrixsolution.com	Never
					test1@yopmail.com	Anh Bui (test1@yopmail.com)	test1@yopmail.com	Jan 16, 2018 at 4:18 PM
					thong.tv@sutrixsolutions.com	Tran Thong (thong.tv@sutrixsolutions.com)	thong.tv@sutrixsolutions.com	Jan 16, 2018 at 5:50 PM

The screenshot shows the OpenCms Account Management interface. The breadcrumb trail is: Account Management > Organizational Unit: root organizational unit > User Management: root organizational unit > User Overview: anhtest123@yopmail.com. The page title is 'User Overview: anhtest123@yopmail.com'. Under the 'User Actions' section, the 'Delete User' icon is highlighted with a green box and a red circle with the number 3. Below this, the user's details are listed under three sections: Identification (Login name: anhtest123@yopmail.com, Description: test description, Last name: anhtest 123, First name: again again, Email: anhtest123@yopmail.com, Organizational unit: root organizational unit), Entity (entity: HC), and Authentication (Enabled: True, Self management: True, Last time logged in: Jan 22, 2018 at 4:42 PM, Created: Jan 19, 2018 at 2:51 PM). At the bottom, there is a 'Delete User: gggg@sutrix.com' section with a 'Notice' box asking 'Do you really want to delete the selected user(s)?'. Below the notice are two buttons: 'Delete' (highlighted with a green box and a red circle with the number 4) and 'Cancel' (highlighted with a red circle with the number 5).

3.2 Delete many user:

1. Click on “New User” icon to redirect to New User page
2. Click on checkbox at the right which you want to delete user
3. Click on “Delete” icon, the confirm popup will appear to ask user “OK” or “Cancel”

Are you sure you want to delete the selected users?
Be careful, all permissions will also be deleted.

The screenshot shows a confirmation dialog box with two buttons: 'OK' and 'Cancel'.

- If click on “OK” button on popup to redirect to Delete user page
- If click on “Cancel” button on popup, it will close confirm popup

4. Click on “Delete” button to delete user

5. Click on “Cancel” button to redirect to previous page

Account Management

OpenCms

Account Management > Organizational Unit: root organizational unit > User Management: root organizational unit

User Management: root organizational unit

User Actions

New User

User Accounts

User Accounts (22)

Search

Address Groups Roles Print

3 Delete Activate Deactivate

E	G	R	A	D	Login*	User Name	Email	Last Login	
					Admin	Administrator ROOT (Admin)	sec.le@sutrixsolutions.com	Jan 17, 2018 at 1:13 PM	2
					Export	(Export)		Never	
					Guest	(Guest)		Never	
					qc_123@sutrixsolution.com	qc1 qc1 (qc_123@sutrixsolution.com)	qc_partner1@sutrixsolution.com	Never	
					an.nvt@sutrixsolutions.com	An NVT (an.nvt@sutrixsolutions.com)	an.nvt@sutrixsolutions.com	Never	
					anh.bui@sutrixsolutions.com	Test 123456789 Anh (anh.bui@sutrixsolutions.com)	anh.bui@sutrixsolutions.com	Jan 17, 2018 at 3:18 PM	
					cuong.vt@sutrixsolutions.com	Vo Cuong (cuong.vt@sutrixsolutions.com)	cuong.vt@sutrixsolutions.com	Jan 16, 2018 at 3:19 PM	
					giahuy	huy huy (giahuy)	huy.lp@sutrixsolutions.com	Never	
					hanh.hong@sutrixsolutions.com	Hanh Hong (hanh.hong@sutrixsolutions.com)	hanh.hong@sutrixsolutions.com	Jan 17, 2018 at 2:56 PM	
					hanhglobedtest2@gmail.com	hanh hong hanh (hanhglobedtest2@gmail.com)	hanhglobedtest2@gmail.com	Jan 17, 2018 at 1:33 PM	
					hanhglobedtest7@gmail.com	Hong Hanh (hanhglobedtest7@gmail.com)	hanhglobedtest7@gmail.com	Jan 2, 2018 at 6:00 PM	
					qc_admin1@sutrixsolution.com	qc1 qc1 (qc_admin1@sutrixsolution.com)	qc_admin1@sutrixsolution.com	Jan 17, 2018 at 10:32 AM	
					qc_admin2@sutrixsolution.com	qc2 qc2 (qc_admin2@sutrixsolution.com)	qc_admin2@sutrixsolution.com	Never	
					qc_admin3@sutrixsolution.com	qc3 qc3 (qc_admin3@sutrixsolution.com)	qc_admin3@sutrixsolution.com	Never	
					qc_investment-managers1@sutrixsolution.com	qc1 qc1 (qc_investment-managers1@sutrixsolution.com)	qc_investment-managers1@sutrixsolution.com	Never	
					qc_investment-managers2@sutrixsolution.com	qc2 qc2 (qc_investment-managers2@sutrixsolution.com)	qc_investment-managers2@sutrixsolution.com	Never	
					qc_investment-managers3@sutrixsolution.com	qc3 qc3 (qc_investment-managers3@sutrixsolution.com)	qc_investment-managers3@sutrixsolution.com	Never	
					qc_partner1@sutrixsolution.com	qc1 qc1 (qc_partner1@sutrixsolution.com)	qc_partner1@sutrixsolution.com	Never	
					qc_partner2@sutrixsolution.com	qc2 qc2 (qc_partner2@sutrixsolution.com)	qc_partner2@sutrixsolution.com	Never	
					qc_partner3@sutrixsolution.com	qc3 qc3 (qc_partner3@sutrixsolution.com)	qc_partner3@sutrixsolution.com	Never	
					test1@yopmail.com	Anh Bui (test1@yopmail.com)	test1@yopmail.com	Jan 17, 2018 at 5:04 PM	
					thong.tv@sutrixsolutions.com	Tran Thong (thong.tv@sutrixsolutions.com)	thong.tv@sutrixsolutions.com	Jan 16, 2018 at 5:50 PM	

Account Management

OpenCms

Account Management > Organizational Unit: root organizational unit > User Management: root organizational unit > User Overview: gggg@sutrix.com > Delete User: gggg@sutrix.com

Delete User: gggg@sutrix.com

Notice

Do you really want to delete the selected user(s)?

4 Delete 5 Cancel

Notification


How to Edit the notification on dashboard page

1. Step 1: Login to Admin page (Open Cms)

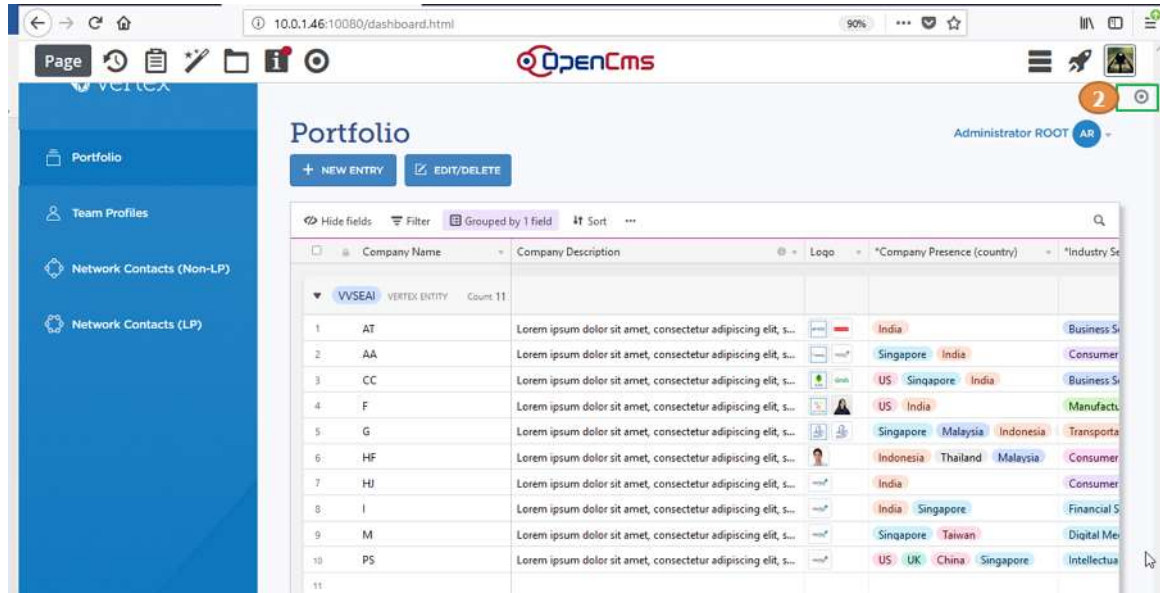
1. Go to Vertex admin website
2. Input username/password
3. Login

2. Step 2:

1. Click on “dashboard.html” link to Dashboard page
2. Click on “dot” icon to edit notification



Name	Title	Type	Size
.content		Sitemap content folder	
changepassword.html	Require Change Password	Container page	1,489
dashboard.html	Dashboard	Container page	1,465
index.html	Home page	Container page	1,462
profile.html	Profile	Container page	1,483



Portfolio

Administrator ROOT AR

Company Name	Company Description	Logo	*Company Presence (country)	*Industry Se
VVSEAI	VERTEX ENTITY	Count 11		
1 AT	Lorem ipsum dolor sit amet, consectetur adipiscing elit, s...		India	Business S
2 AA	Lorem ipsum dolor sit amet, consectetur adipiscing elit, s...		Singapore India	Consumer
3 CC	Lorem ipsum dolor sit amet, consectetur adipiscing elit, s...		US Singapore India	Business S
4 F	Lorem ipsum dolor sit amet, consectetur adipiscing elit, s...		US India	Manufactu
5 G	Lorem ipsum dolor sit amet, consectetur adipiscing elit, s...		Singapore Malaysia Indonesia	Transporta
6 HF	Lorem ipsum dolor sit amet, consectetur adipiscing elit, s...		Indonesia Thailand Malaysia	Consumer
7 HI	Lorem ipsum dolor sit amet, consectetur adipiscing elit, s...		India	Consumer
8 I	Lorem ipsum dolor sit amet, consectetur adipiscing elit, s...		India Singapore	Financial S
9 M	Lorem ipsum dolor sit amet, consectetur adipiscing elit, s...		Singapore Taiwan	Digital Me
10 PS	Lorem ipsum dolor sit amet, consectetur adipiscing elit, s...		US UK China Singapore	Intellectua
11				

3. Step 3:

1. Date: click on it to edit date for notification (ex. PorfolioNotify, TeamProfilesNotify,)
2. Content: input content which you want (ex. PorfolioNotify, TeamProfilesNotify,)
3. Save: click on it, all value saved successful
4. Save and exit: click on it will lead user go back to Dashboard page, all value saved
5. Publish: click on it to publish on Client site
6. Close: click on it to go back to Dashboard page

The screenshot displays the OpenCMS Content Manager interface. At the top, a navigation bar includes a 'Content' tab, a toolbar with icons for undo, redo, and other actions, the OpenCMS logo, a language dropdown set to 'English', and user profile icons. Below the navigation bar, a file path is shown: 'vertex-00001.xml' with a sub-path '/.content/vertex/vertex-00001.xml [en]'. The main content area is divided into four sections, each representing a different notification type: 'PortfolioNotify', 'TeamProfilesNotify', 'NetworkContactNonLP', and 'NetworkContactLP'. Each section contains a 'Date' field and a 'Content' text area. Numbered callouts are placed over the interface: 1 points to the 'Date' field of 'PortfolioNotify'; 2 points to the 'Content' text area of 'PortfolioNotify'; 3 points to the 'Save' icon in the top toolbar; 4 points to the 'Save and exit' icon in the top toolbar; 5 points to the 'Publish' icon in the top toolbar; and 6 points to the 'Close' icon in the top toolbar. The 'Content' text areas for 'TeamProfilesNotify', 'NetworkContactNonLP', and 'NetworkContactLP' contain the text 'Companies AT, AA, CC Anh, updated TeamProfiles', 'Companies AT, AA, CC Anh, updated NetworkContactNonLP', and 'Companies AT, AA, CC Anh, updated NetworkContactLP' respectively.

The notification will show at Client site as below:

The screenshot displays the 'Team Profiles' page in the Vertex application. The left sidebar contains navigation links for 'Portfolio', 'Team Profiles', 'Network Contacts (Non-LP)', and 'Network Contacts (LP)'. The main content area shows a table with 10 records of team members. A notification bubble in the bottom right corner indicates a data update on 29 Dec 2017.

	Name	Vertex Entity	Primary office (city)	Title	Pic	Invested Portfolio Companies	*Technolo
1	CN	VVHC	Palo Alto Singapore	Principal		EL N BT	Biotechn
2	JL	VVHC	Singapore	Managing ...		BT KM PP N	Biotechn
3	LH	VVHC	Palo Alto	Principal		MM IV KM PP	Health IT
4	LVC	VVHC	Singapore	Venture Par...		IV MM EL	Medical
5	JX	VVC	Beijing	Investment...			
6	LW	VVC	Shanghai	Associate I...		EO 天地玄黃	
7	LTR	VVC	Beijing	Investment...		H 天地玄黃	
8	MS	VVC	Beijing	Investment...		HM 天地玄黃 J 天地玄黃 JL 天	
9	TCC	VVC	Beijing	Managing ...		MO 天地玄黃 LCB 天地玄黃 Ek Mobile	
10	WF	VVC	Shenzhen	Investment...			

10 records

Airtable

29 Dec 2017
Companies AT, AA, CC Anh, updated TeamProfiles

Import User Data

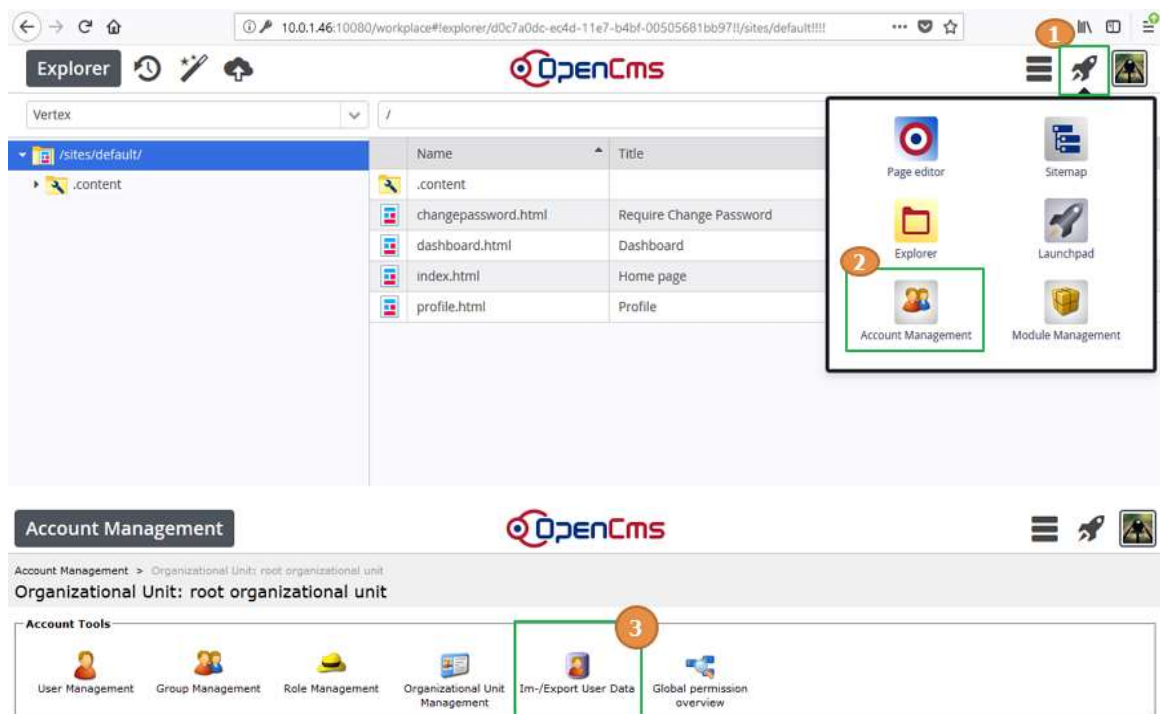
How to Import User Data

1. Step 1: Login to Admin page (Open Cms)

1. Go to Vertex admin website
2. Input username/password
3. Login

2. Step 2:

1. Click on “Quick launch” icon on top right corner to open popup
2. Click on “Account Management” icon on popup
3. Click on “Im-/Export User Data” icon to redirect to Im-/Export User Data page



3. Step 3: Im-/Export User Data page will display as below:

1. Click on “Import User Date CSV” icon to redirect to Import User Data CSV page
2. Click on “Add” icon of Group to display Group icon

- Click on group icon, this section will display as below:

The 'Group Selection' window displays a list of 8 groups. At the top, there is a search bar and a 'Print' button. Below the search bar, a table lists the groups with a 'G' icon in the first column and the group name in the second column.

G	Name
	admin
	Administrators
	General partner
	Guests
	investment-managers
	Managing partners
	partner
	Users

+ Choose any group to add for the user

Note: we have 2 role for user group as below: (if choose all that it will get “investment-manager” role to display Client site)

Persona (User group)	Portfolio	Team Profiles	Network Contacts (Non-LP)	Network Contacts (LP)
Investment Managers	X	X	X	
General partner, Partners, Managing partners	X	X	X	X
Admin	X	X	X	X

3. Click on “Browse” button to select CSV file to import data

4. Click on “Continue” button to import user data

Note: Please choose group before to click on “Continue” button

5. Click on “Cancel” button to go back Im-/Export User Data page

The 'Im-/Export User Data' section of the 'Account Management' page shows two buttons: 'Export User Data CSV' and 'Import User Data CSV'. The 'Import User Data CSV' button is highlighted with a green border and a red circle with the number '1' next to it.

Account Management OpenCMS

Account Management > Organizational Unit: root organizational unit > Im-/Export User Data > Import User Data CSV

Import User Data CSV

Hint
If you are choosing not a group either a role, the imported users will not be assigned to any group or role.

Import User

Groups: (Click on the "New" button on the right side to activate this element) 2

Roles: (Click on the "New" button on the right side to activate this element)

Password:

Import File: Browse... No file selected. 3

4 Continue Cancel 5

Sample CSV file:

AutoSave vertex_user_info.csv - Excel Bui Thi

File Home Insert Page Layout Formulas Data Review View Help Tell me what you want to do

Clipboard Font Alignment Number Styles Cells

	A	B	C	D	E	F	G
1	name	description	lastname	firstname	email	entity	password
2	test2@yopmail.com	This is root user	Test	User 2	test2@yopmail.com	DC	bbb12345
3							
4							

These notes to import csv file success.

- * The name of the attribute must not be changed.
- * Required fill in 4 fields: name, lastname, firstname, email, password.
- * Fields "name" and "email" must be same.
- * Password at least 8 characters.
- * Email must be the correct syntax.

Note: All data in CSV file will follow Group (2) that you add before