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User Management

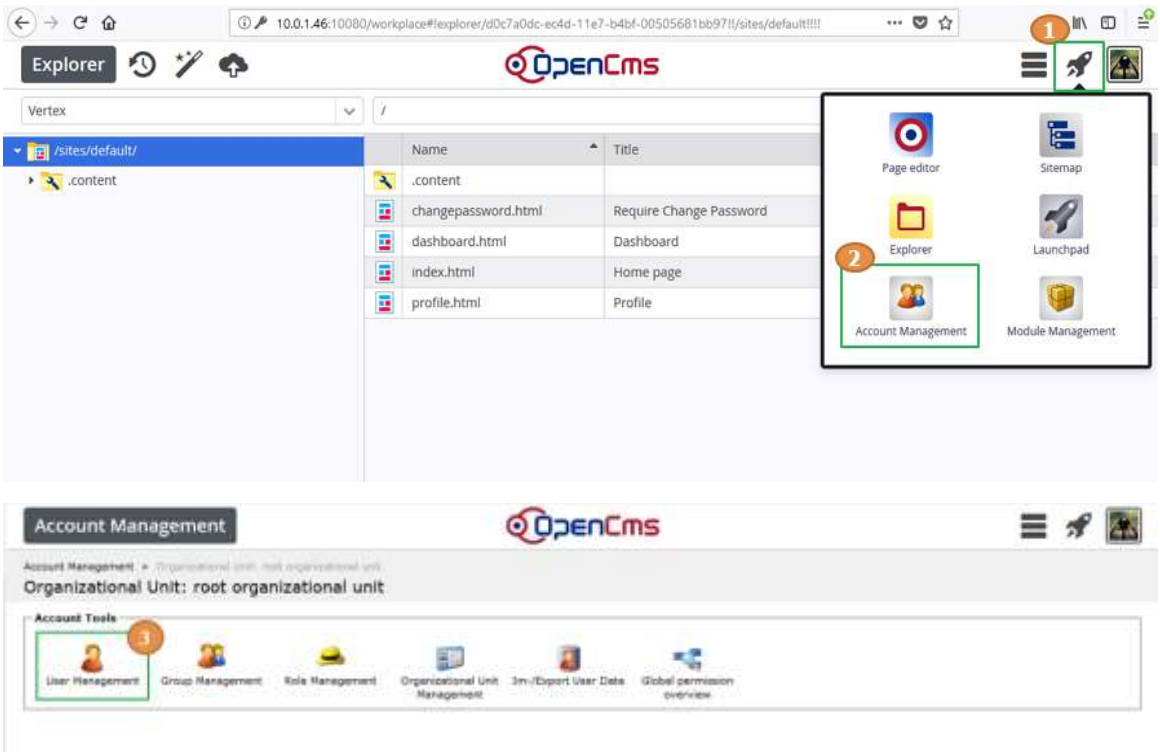
How to Add a user

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

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

2. Step 2:

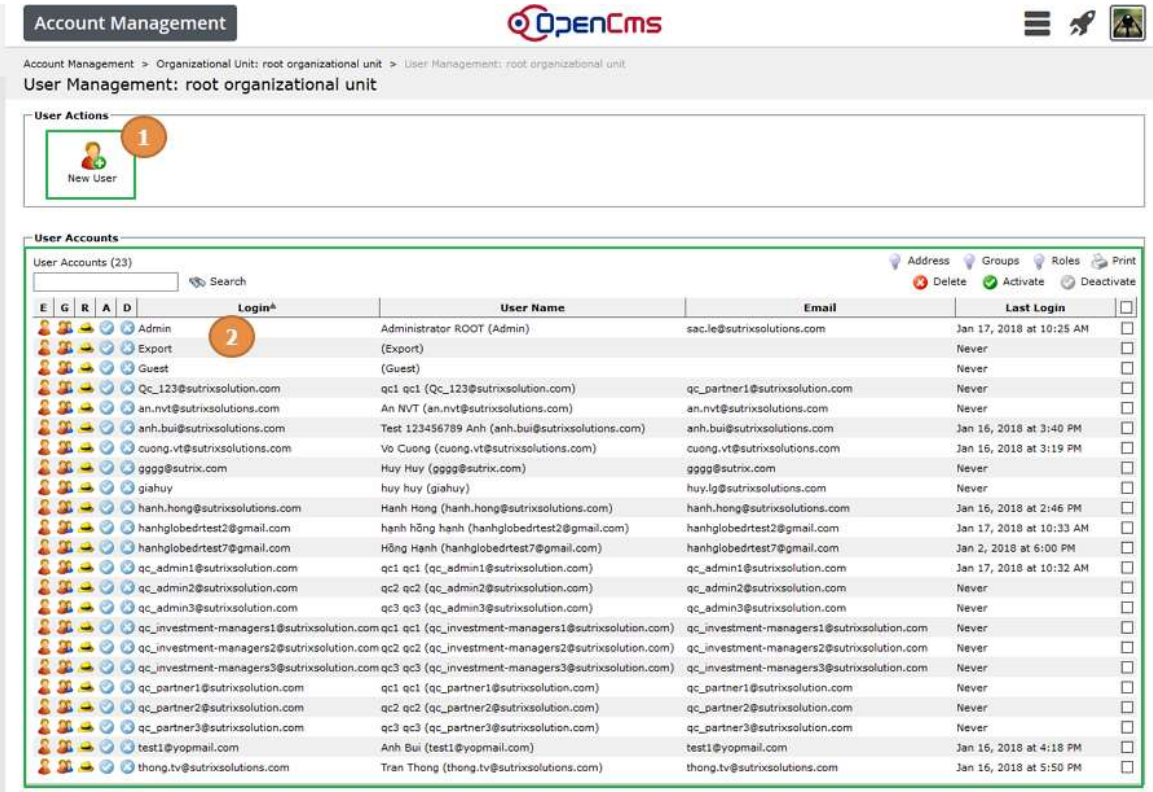
1. Click on “Quick launch” icon on top right corner to open popup
2. Click on “Account Management” icon on popup
3. Click on “User Management” icon to redirect to User Management page



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



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

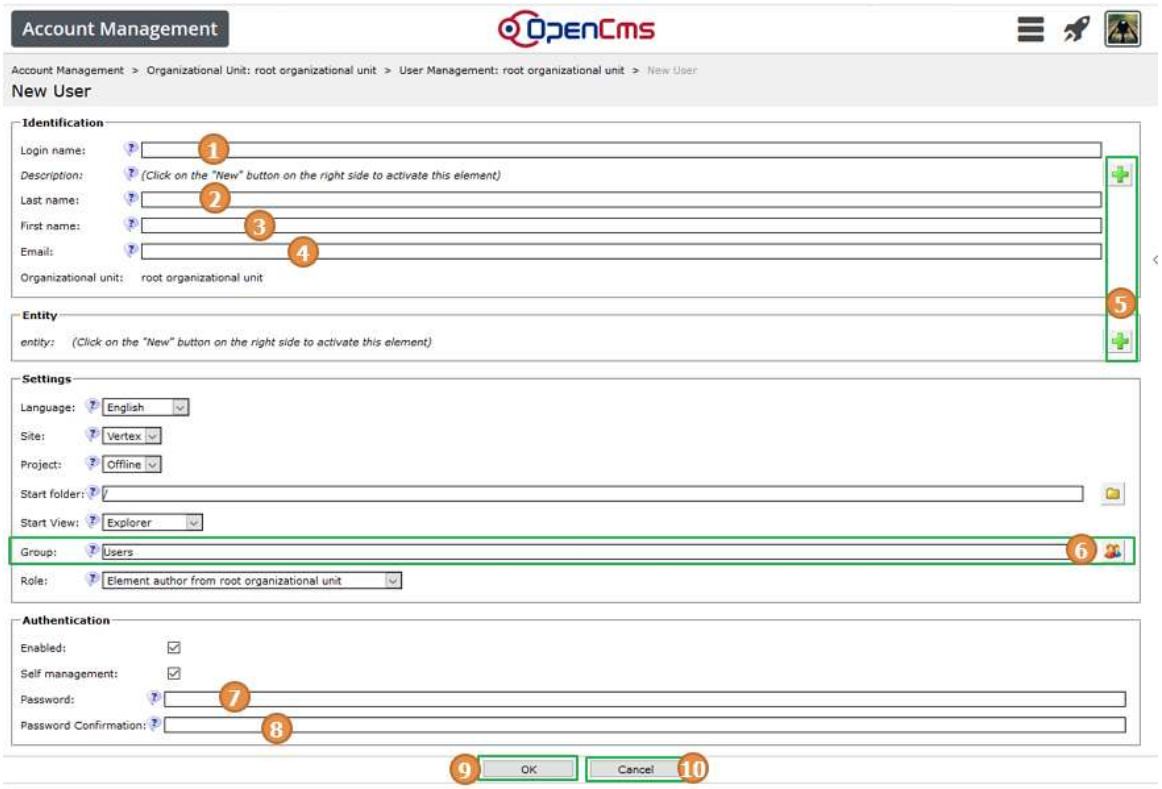
7. Password (mandatory): input a password to login at Client site

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

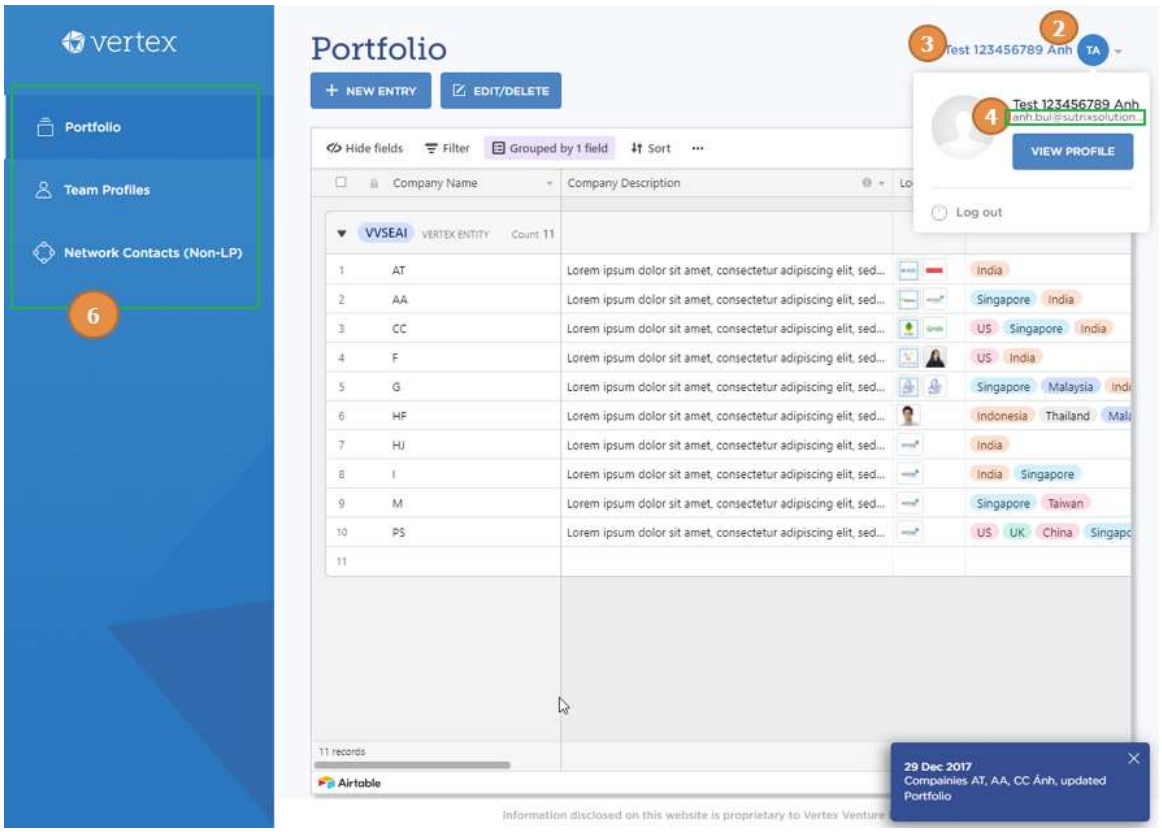
9. Save: click on it that all value will be saved

10. Cancel: click on it to redirect previous page

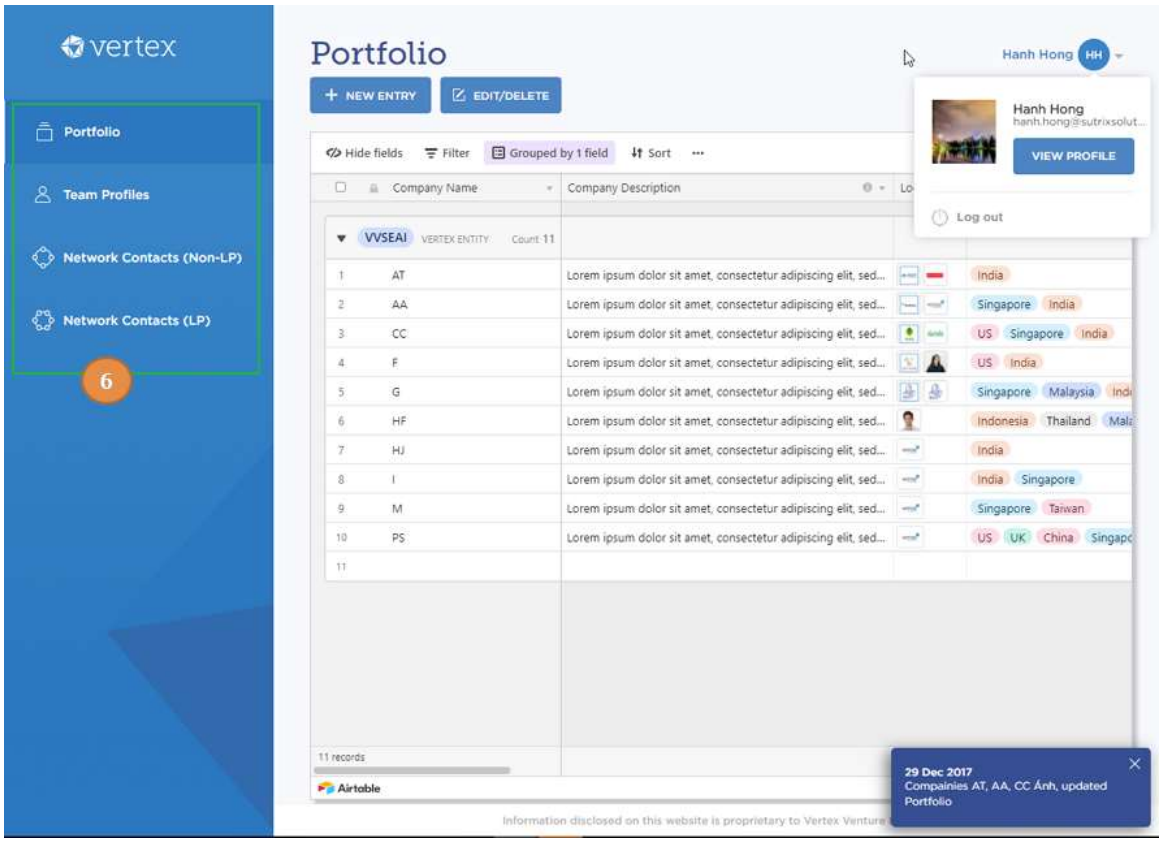


The page will show at Client site after input:

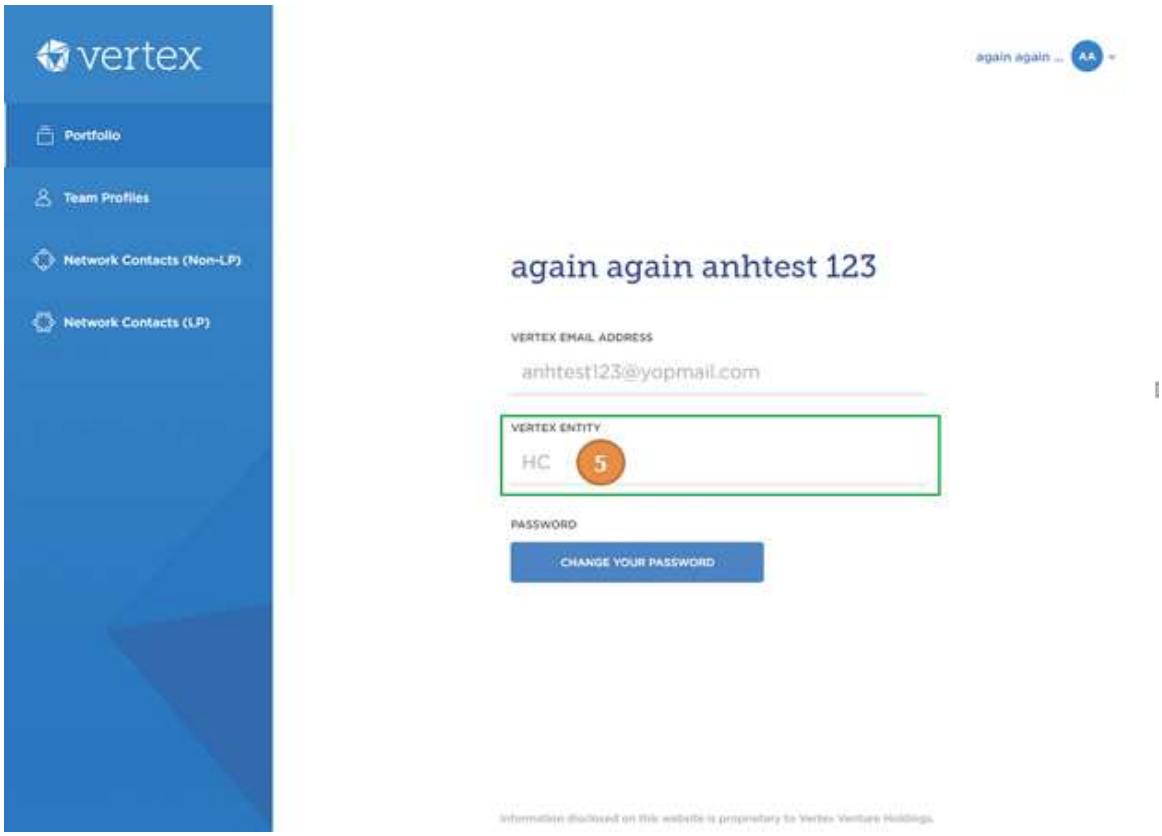
- If the role is “investment-manager” or all roles will show as below:



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



- Entity display at Client site as below:


vertex
Portfolio
Team Profiles
Network Contacts (Non-LP)
Network Contacts (LP)
again again ...
AA
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.

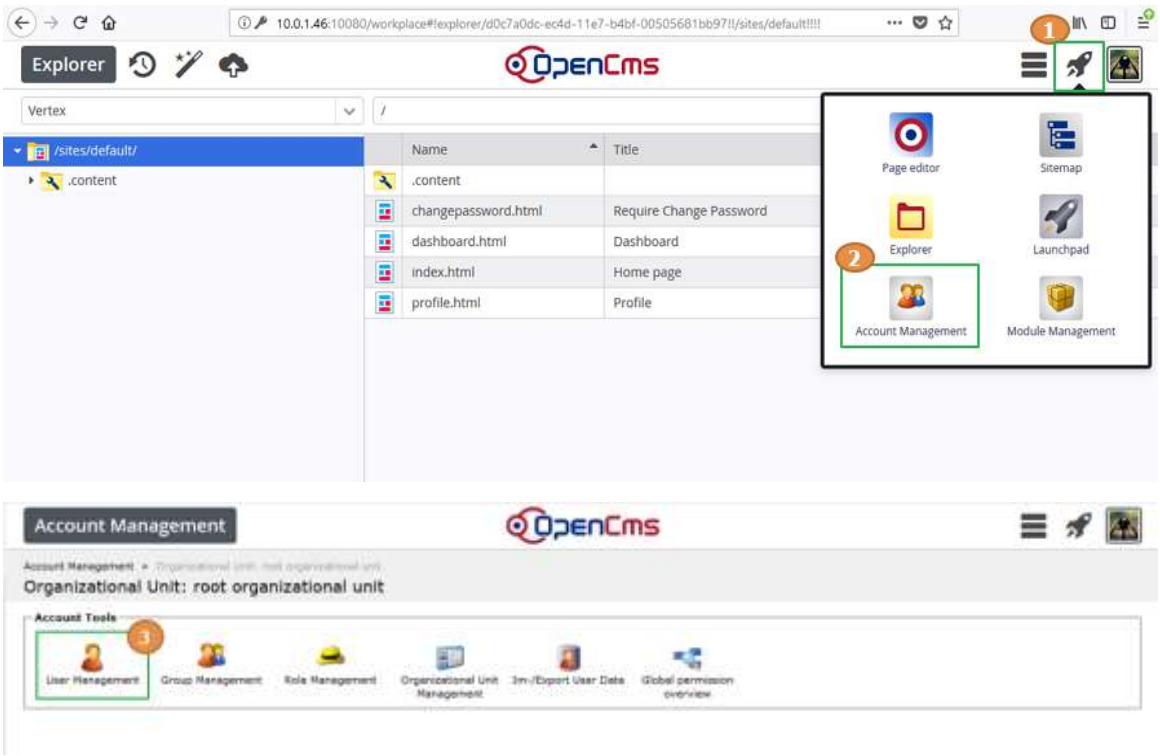
How to Edit a user

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

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

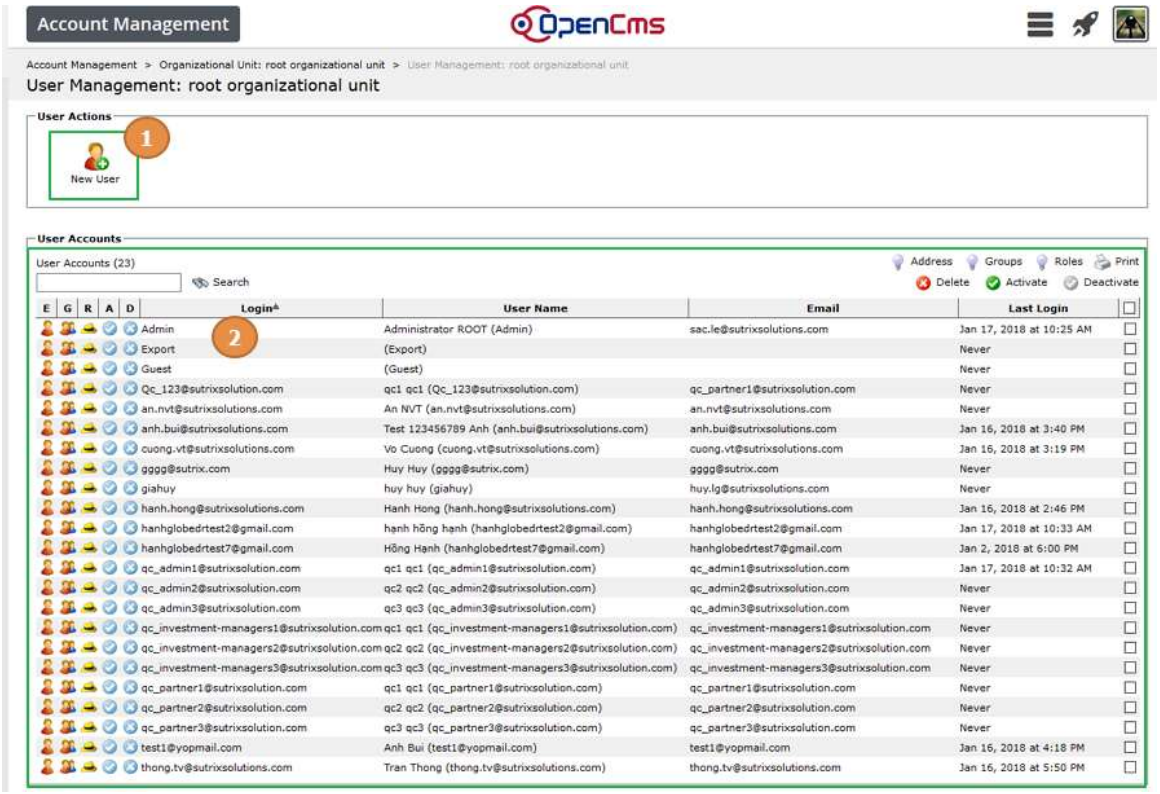
2. Step 2:

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



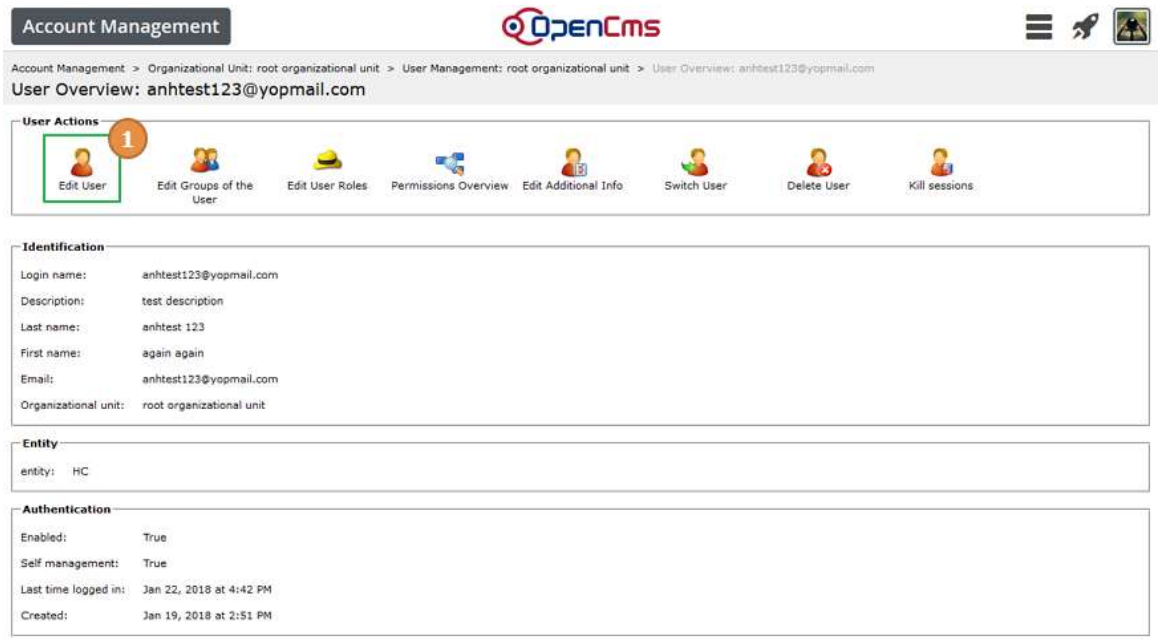
3. Step 3: User management page will display as below:

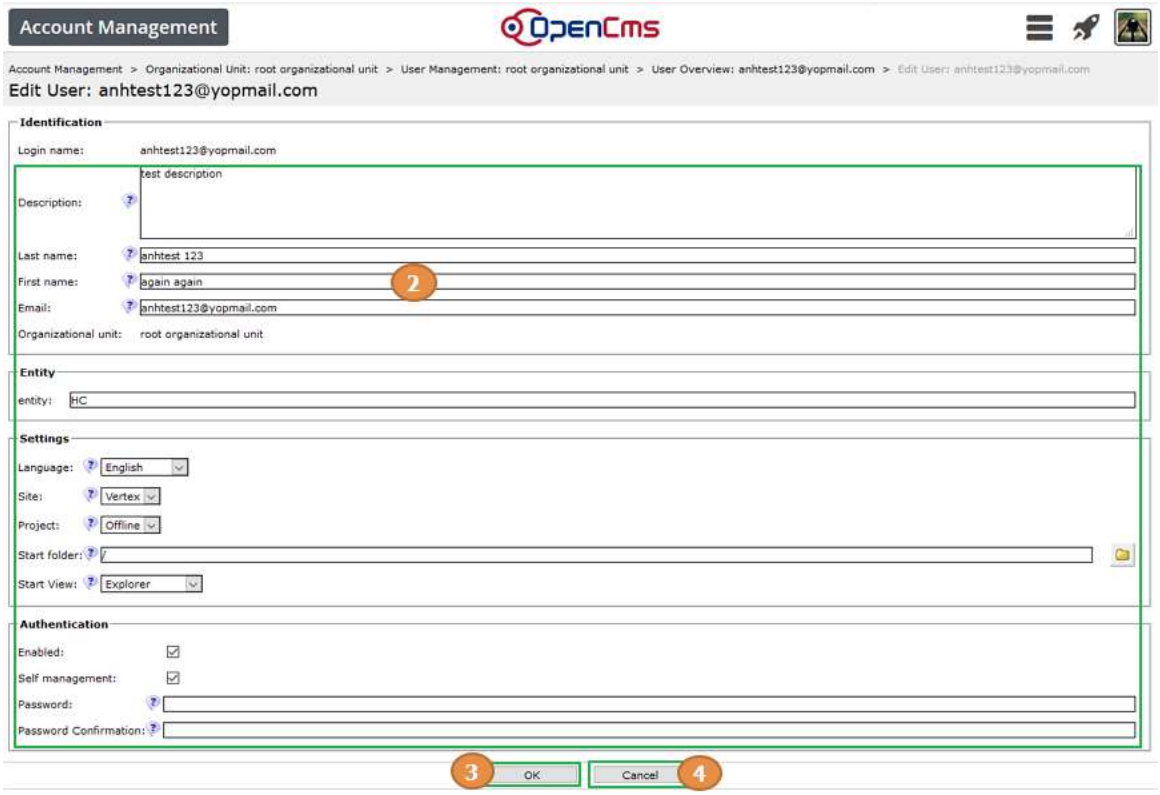
1. Click on “New User” icon to redirect to New User page
2. List user account to edit or delete user



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

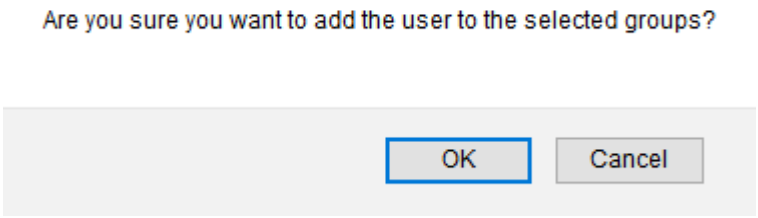

Account Management
Account Management > Organizational Unit: root organizational unit > User Management: root organizational unit > User Overview: anhtest123@yopmail.com > Edit User: anhtest123@yopmail.com
Edit User: anhtest123@yopmail.com
Identification
Login name: anhtest123@yopmail.com
Description: test description
Last name: anhtest 123
First name: again again
2
Email: anhtest123@yopmail.com
Organizational unit: root organizational unit
Entity
entity: HC
Settings
Language: English
Site: Vertex
Project: Offline
Start folder: /
Start View: Explorer
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”



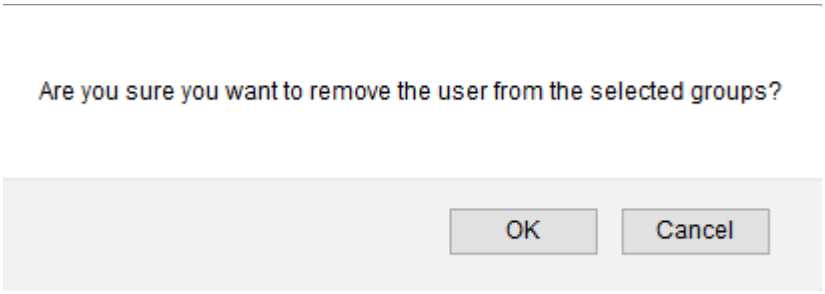
- If click on “OK” button on popup to add to User Groups column

- If click on “Cancel” button on popup, it will close confirm popup

4. Group of the user added at User Groups column

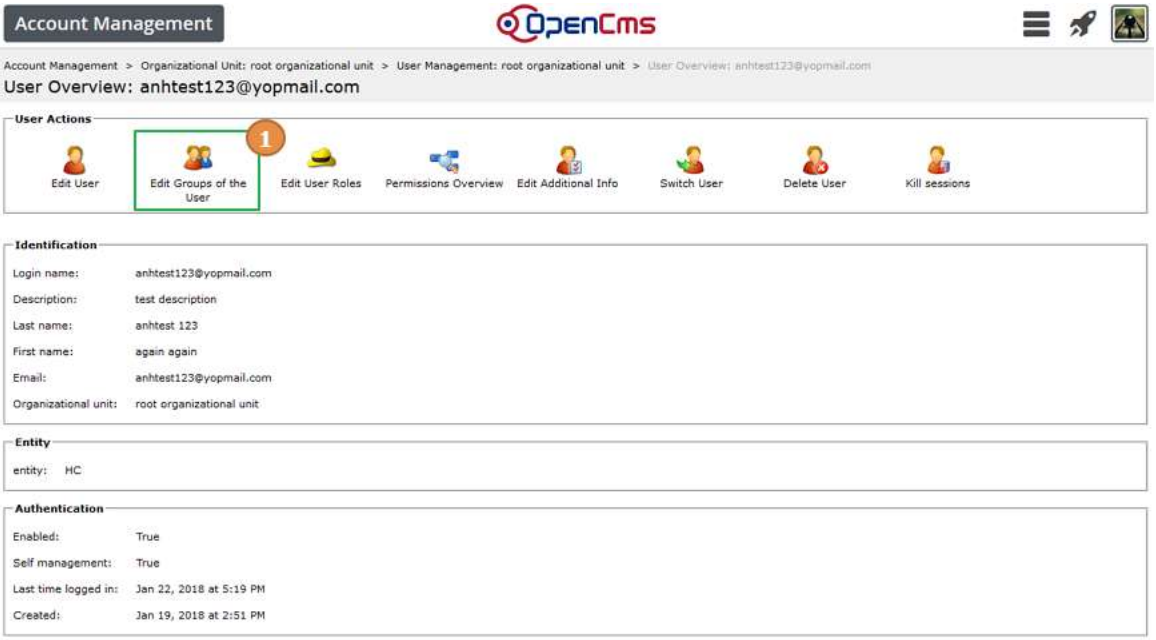
- If you want to delete group user that click on any checkbox of User Groups column

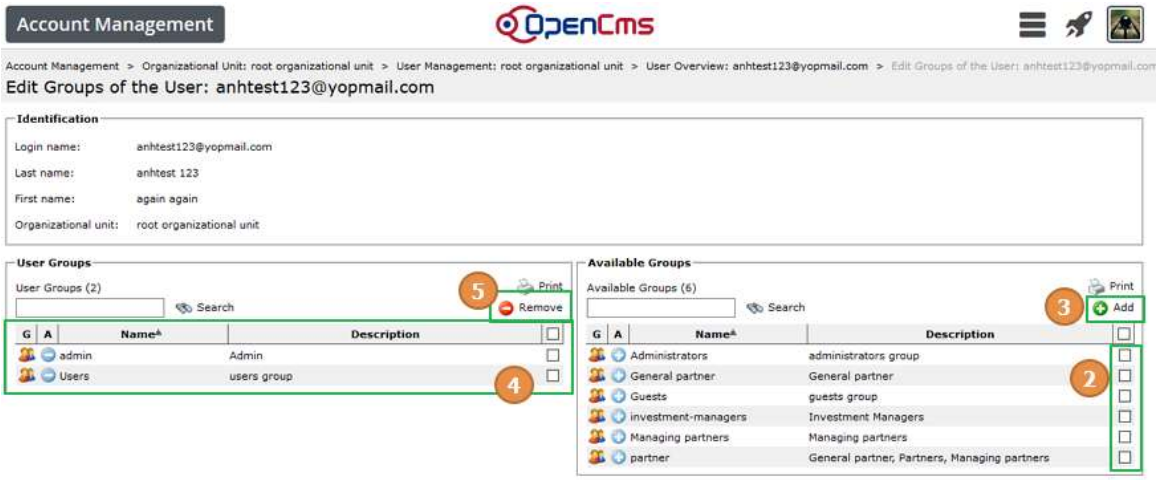
5. Click on “Remove” icon of User Groups column, the confirm popup will appear to ask user “OK” or “Cancel”



- 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
Edit Groups of the User
1
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)
Search
Print
5
Remove
G A Name Description
admin Admin
Users users group
4
Available Groups
Available Groups (6)
Search
Print
3
Add
G A Name Description
Administrators administrators group
General partner General partner
2
Guests guests group
investment-managers Investment Managers
Managing partners Managing partners
partner General partner, Partners, Managing partners

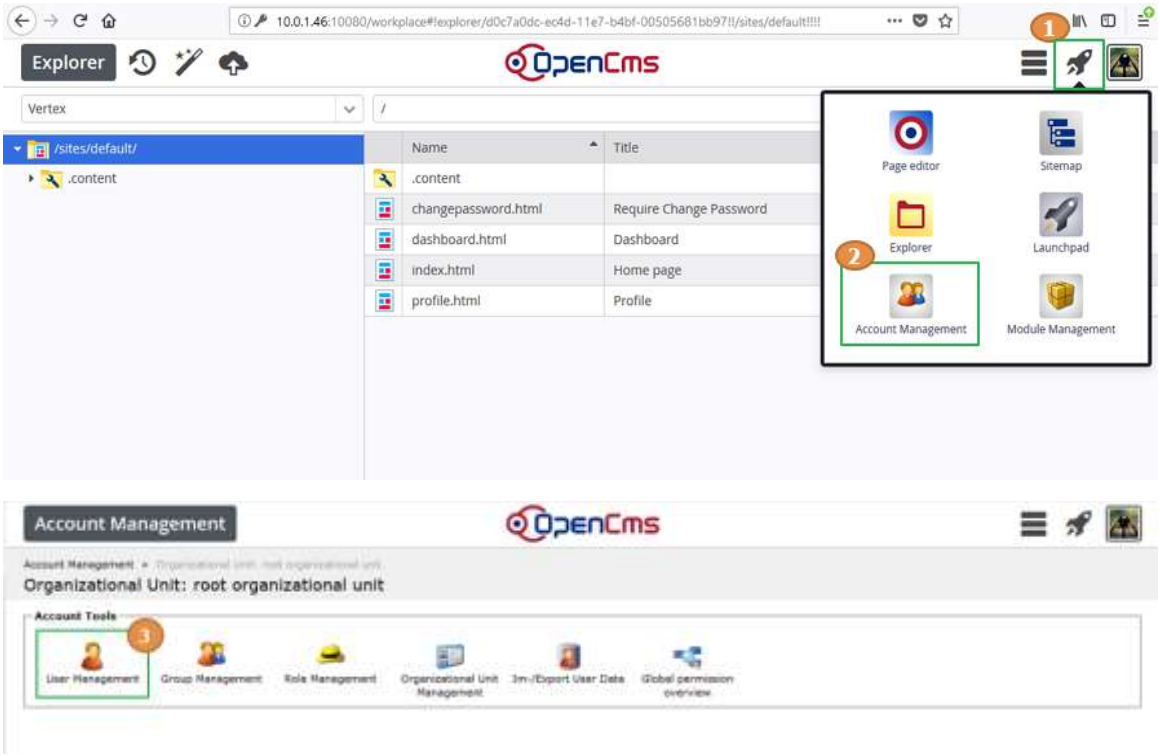
How to Delete user

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

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

2. Step 2:

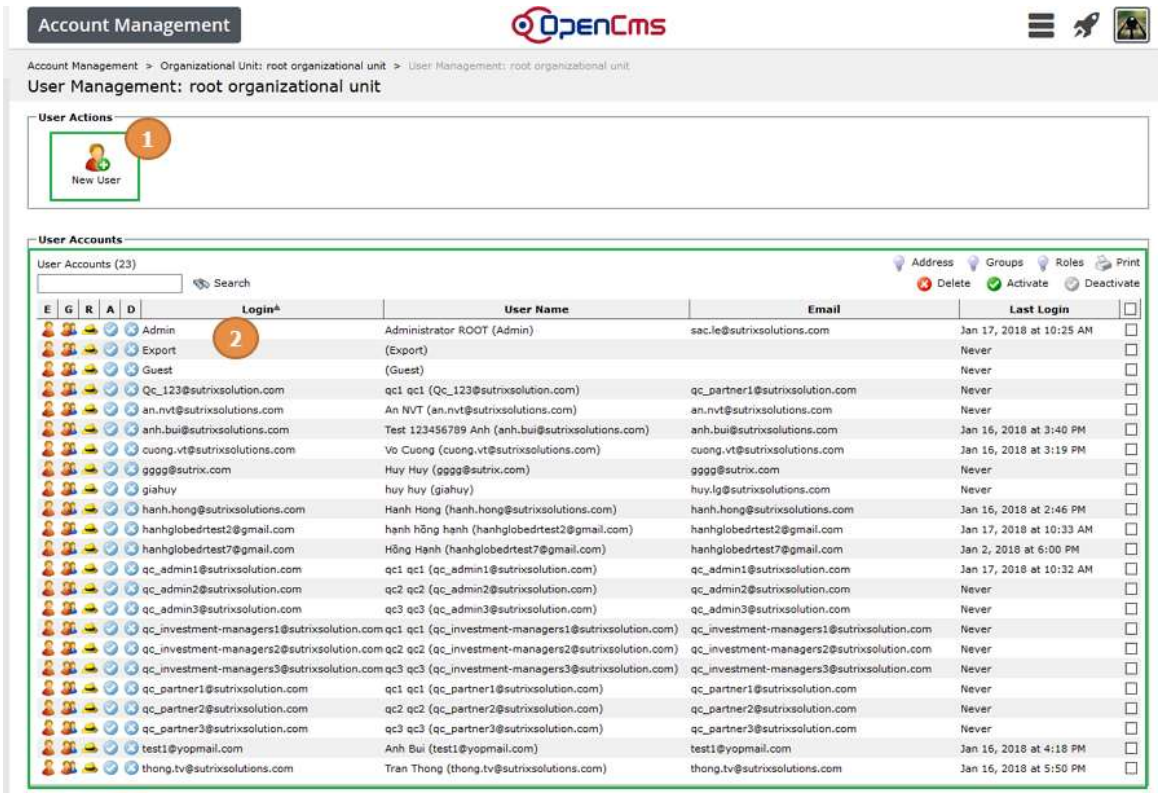
1. Click on “Quick launch” icon on top right corner to open popup
2. Click on “Account Management” icon on popup
3. Click on “User Management” icon to redirect to User Management page

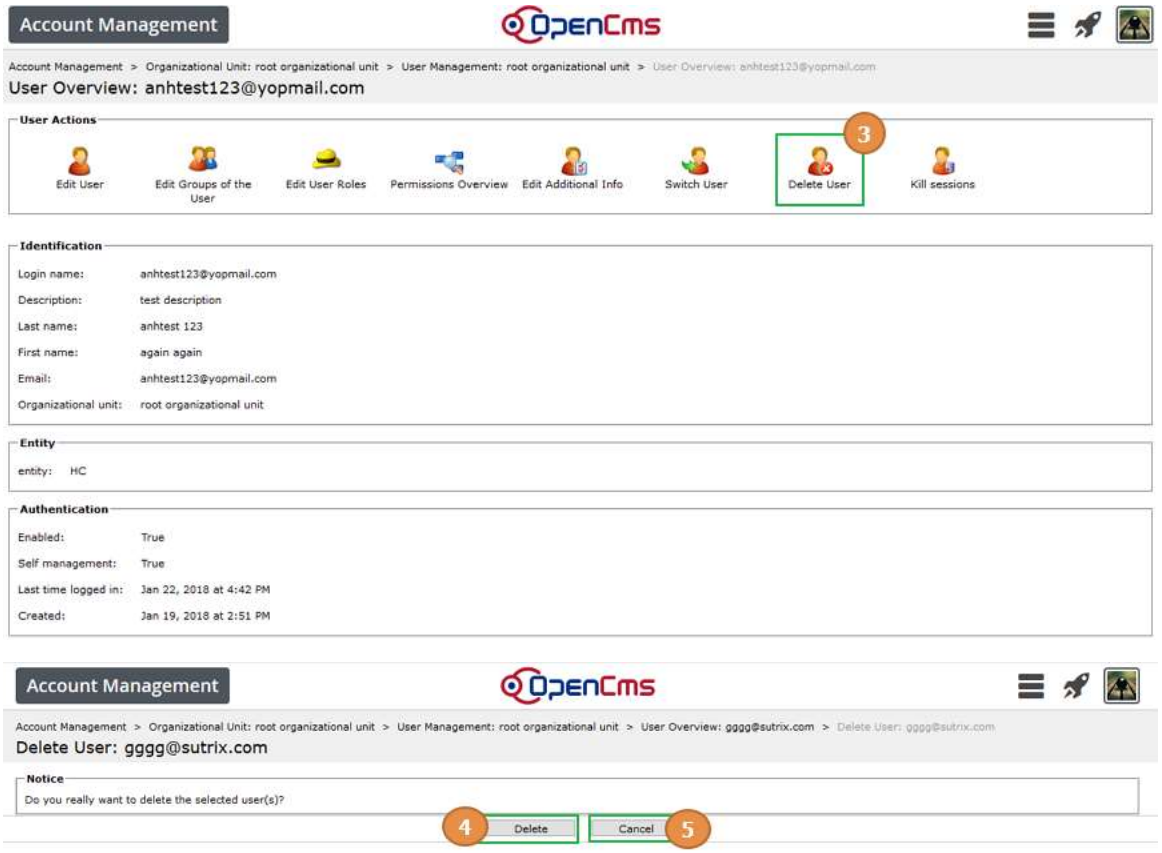


3. Step 3: Delete user

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



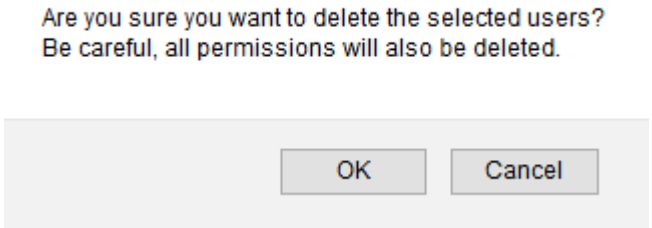


3.2 Delete many user:

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”

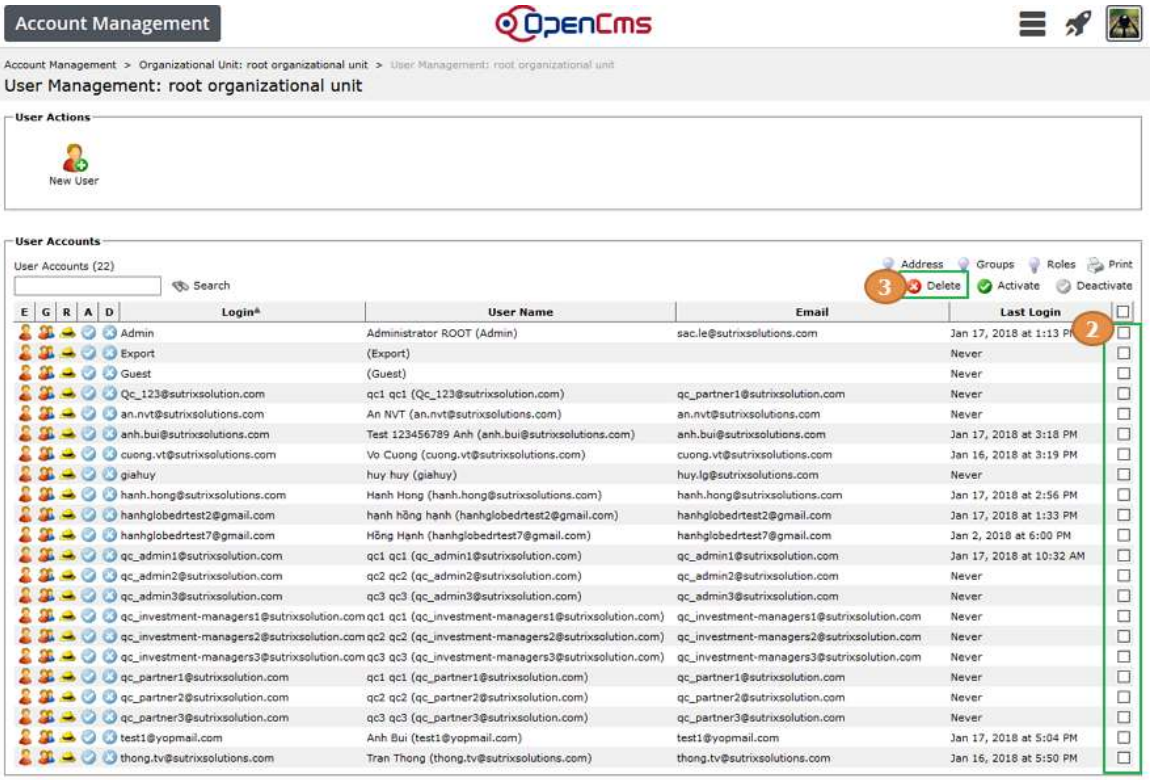


- If click on “OK” button on popup to redirect to Delete user page

- 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



Notification

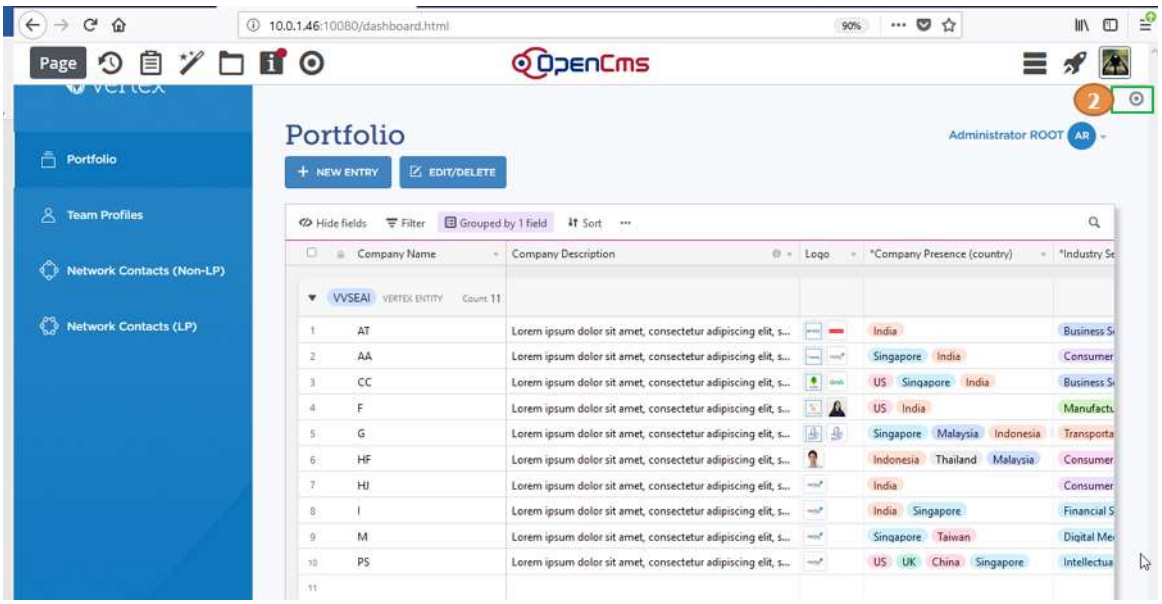
How to Edit the notification on dashboard page

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



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, …..)

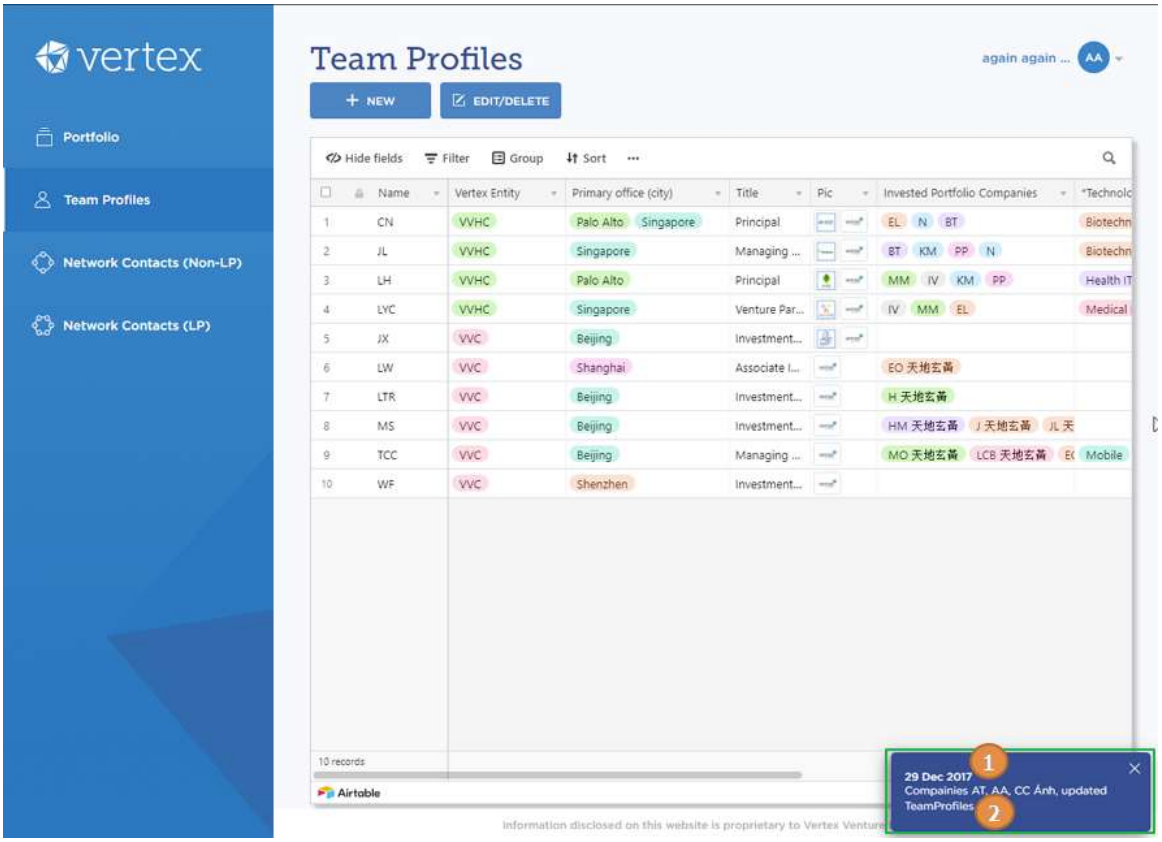
3. Save: click on it, all value saved successful

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 notification will show at Client site as below:



Import User Data

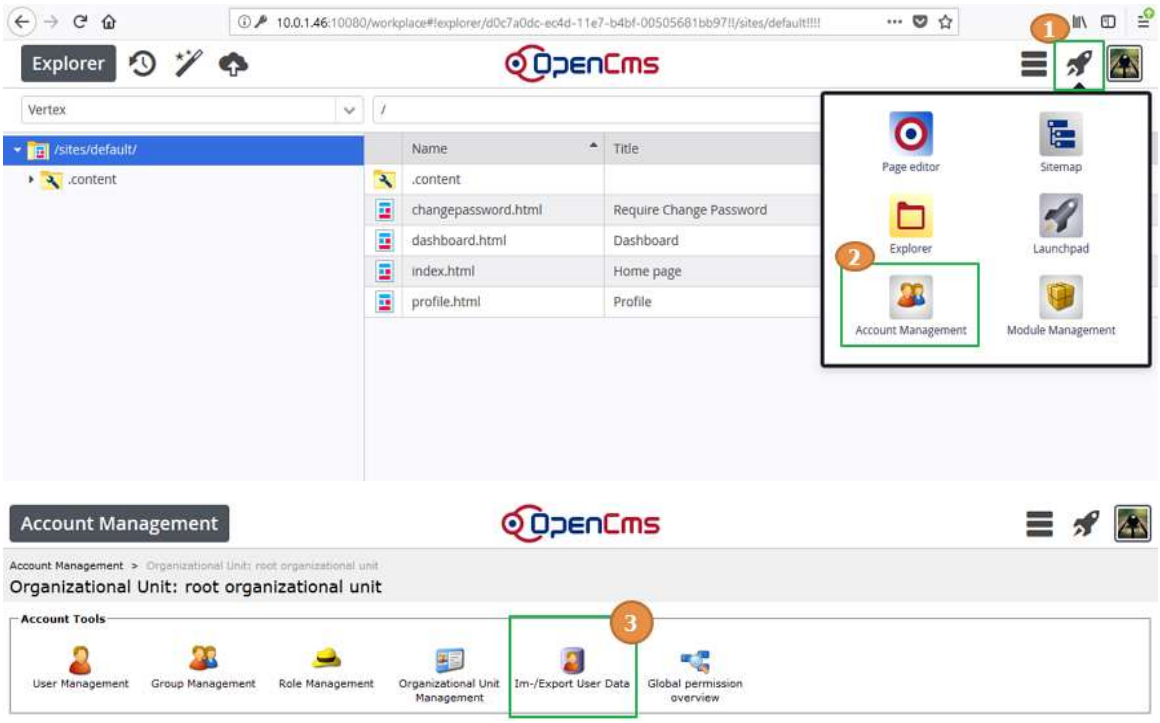
How to Import User Data

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:

+ 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

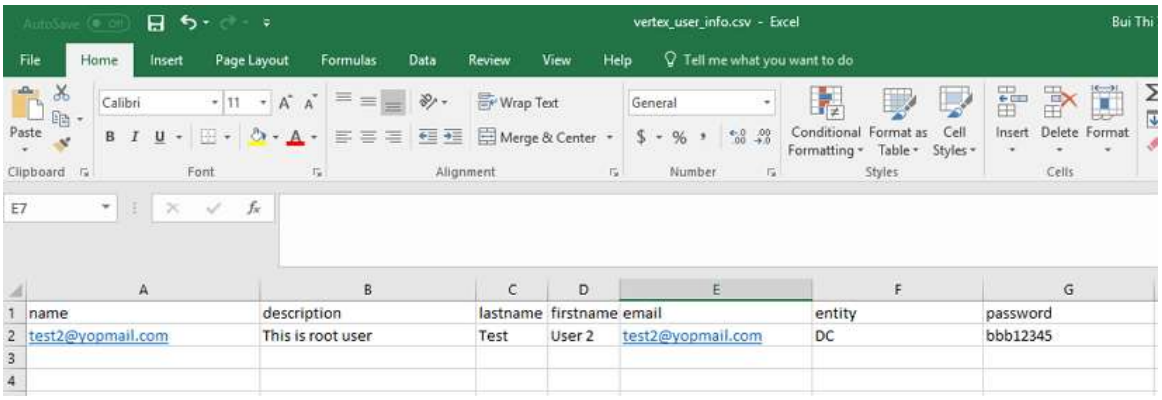
3. Click on "Browse" button to select CSV file to import data

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

Sample CSV file:



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