# InformationLeader 4.3

## User Manual Administration Module 1.0.0

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# Key to Used Icons

 **Caution**

 **Good**

 **Help**

 **Hint**

 **Information**

 **Note**

 **Path to Task page**

 **Click**

 **Enter**

 **Drop down List**

 **Save**

 **Print**

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# Administration Module

## 1 Introduction to the Administration Module

The Administration module is used for the configuration and management of administrative information that is used for the proper and efficient functioning of the InformationLeader solution. This information is then used by other modules of the InformationLeader system. Typical administrative information configured and managed in the Administration module includes:

- Creation and maintenance of Divisional and Organisational Areas;
- Creation of Roles and assigning Role Permissions;
- Creating and managing Users authorised to use the InformationLeader solution;
- Creating and managing centrally managed lists to be used across all Divisions and Organisational Areas within the solution (Managed Lists);
- Creating, managing and scheduling system jobs and job categories; and
- Remote Synchronisation.

The Administration module must be configured first before the solution can be used across an organisation. Typically the initial configuration of the Administration module is done by Theta Technologies consultants in consultation with the Company's representative liaising the implementation of the InformationLeader solution within the company.

### 1.1 Access to the Administration module

Within an organisation there are limited number of Users referred to as Super Users who are given full access to the Administration module and the different functional areas within the module. This is to ensure that unauthorised changes (that can impact upon the proper and efficient functioning of the Company) are not made to the InformationLeader solution.

**For the purpose of explaining the Administration module it is assumed that the User has full access to the Administration module and its functional areas. Therefore users reading this manual without the necessary Role Permissions will not be able to access and view all the areas of the module as described in this document.**

## 2 The Administration module

Accessing the Administration module displays the default Users page. The Index area lists the nine functional areas that are accessed for configuring various facets of the InformationLeader solution. The Index area listing the nine Functional areas is shown in the default page of the Administration module as illustrated in Figure 1.

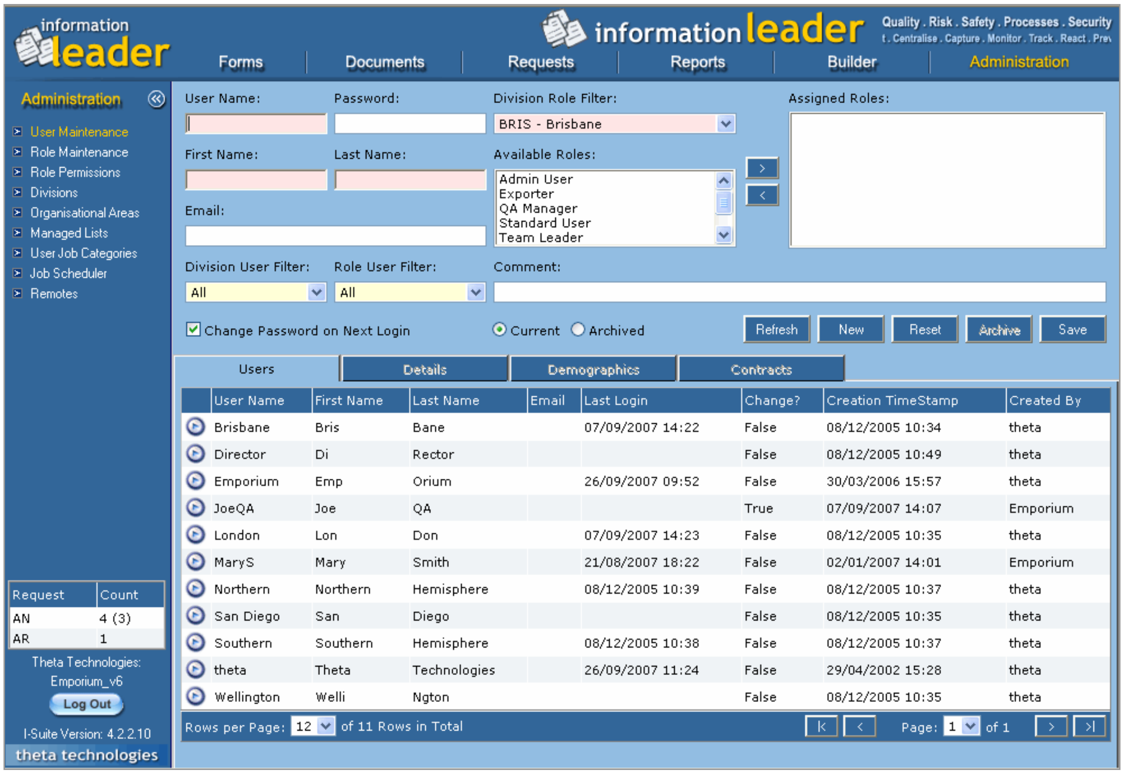


**Figure 1 –** Default Administration module page (Users page)

Typically when InformationLeader is implemented at a site the order of configuration is:

- Divisions;
- Organisational Areas;
- Roles;
- Role Permissions;
- Users;
- Managed Lists;
- Job Categories;
- Job Schedules; and
- Remotes (optional).

It is assumed for the purpose of this manual that the InformationLeader solution has already been implemented and is a fully functional solution. Therefore the subsequent sections of this chapter explain the different Functional areas in the order that these are listed in the Index of the Administration module.

# 3 User Maintenance

The User Maintenance Functional area is used for creating and managing Users authorised to use the InformationLeader solution. It is not necessary to include all employees within the company as InformationLeader Users unless it is so required.

Only those employees of a company who have been given an InformationLeader User Name and Password can access the solution. The Users Page illustrated in Figure 1 is used by the Administrator to sets up and manage the users by:

- Creating and managing User Names;
- Creating and managing User Passwords;
- Configuring an email address for the User which will be used by InformationLeader to send email notifications; and
- Assigning Roles in one or more Divisions (as applicable) to Users.

The Division-Roles assigned to a User determine the User's access to:

- Divisions; and
- The level of access to different areas of the InformationLeader solution.

The read and write permissions in each module, for each User, are dependant on the roles assigned to the User in User Maintenance. Permissions for each Role are assigned in the Role Permissions Functional Area and explained in 5. A user may be assigned to one or more Roles in one or more Divisions.

## 3.1 User Page – Details Area

The fields and buttons in the Details area of the User page are explained in Figure 2 and Table 1.

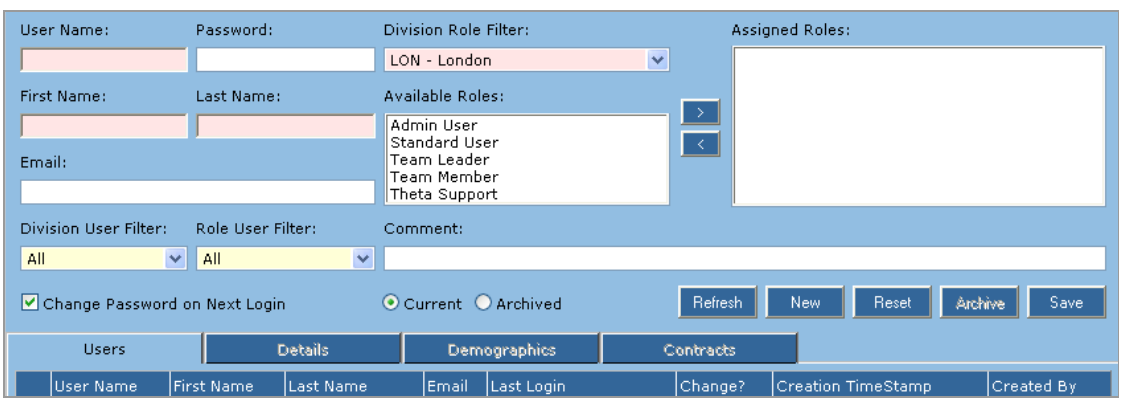



**Figure 2 –** Users page Details area

| Fields / Buttons | Explanation |
|---|---|
| User Name | The User Name to be allocated to the User for accessing InformationLeader is entered in this field. To facilitate Windows Authentication (refer to Administrators Task Manual) for Login the User Name issued to the User for their Windows Login must be identical to the User Name allocated for InformationLeader Login.<br>There is a maximum limit of 20 characters for the User Name. The User Name is not case sensitive. |
| Password | The Password field is used to create a default password for a User. This field is also used to override a User's password and issue a new password in case the user has forgotten their password. The User can log into InformationLeader and then change their password as explained in the Introduction to InformationLeader module.<br>The Password is case sensitive and must be between six and twenty characters. |
| First Name | The Users First name is entered in this field. |
| Last Name | The Users Last name is entered in this field. |
| Email | If the User has access to an emailing system then the User's email address is entered in this field. This email is used for electronic notifications generated by the solution for the attention of the User, or the Role(s) assigned to the User. |
| Division Role Filter | This is a Drop Down listing all the InformationLeader Divisions created by the Company. Selecting a Division displays all the Roles created for the selected Division. |
| Available Roles | This Text Box contains all the Roles assigned to the Division selected in the 'Division Role Filter'. Once a Role is assigned to a User it is then displayed in the Assigned Roles Text Box and no longer displayed in the Available Roles Text Box.<br>To select more than one Role in this field, click on the first Role to be assigned, hold down the Ctrl key on the keyboard and then click on the other Role(s) required.<br>To select consecutive Roles, click on the first Role to be assigned, hold down the Shift key on the keyboard and then click on the last Role required in the list.<br>The assigned Role(s) are then displayed in the Assigned Roles field. |
| Assigned Roles | The Roles to be assigned to the current User are selected in the 'Available Roles' box and moved to this box by using the button. |
| Division User Filter | This filter is used to filter the list of Users by selecting a Division from the Drop down. This then displays the Summary table only with the Users assigned to the selected Division. |
| Role User Filter | This filter is used to filter the list of Roles by selecting a Role from the Drop down. This then displays the Summary table only with the Users assigned to the selected Role.<br>When this filter is used in combination with the Division User Filter the Summary Table will only display Users assigned the selected Division and Role. |

| Fields / Buttons | Explanation |
|---|---|
| Comments | The Comments box is used only if a special note needs to be mentioned for the User. |
| ☑ Change Password on Next Login | This Check Box is ticked by default when a new User is created. It prompts the User to change their password when they next log in. The Check Box is also ticked when the Reset button is clicked. For more information on Changing Passwords please refer to the Introduction to InformationLeader module. If this check box is not ticked the User will not be prompted, but can still change their password. |
| ◉ Current ○ Archived | The Current and Archived Radio buttons are selected to present the respective views in the Summary Table. The buttons are mutually exclusive, i.e. both buttons cannot be selected at the same time. The Current Radio Button is selected by default. |
| > | Assigns the Roles(s) selected in the Available Roles field to the User. It is mandatory to assign at least one Role to a User. |
| < | Removes the Roles(s) selected in the Assigned Roles field for the User. Multiple Roles can be selected as explained in Available Roles. |
| Refresh | The Refresh button is used to Refresh the Summary Table after entering a value in the User Name, First Name, or the Last Name fields. Entering a full name or part of a name in the appropriate field respectively filters the displayed list of Users in the Summary table. |
| New | The New button is used to clear the fields in the Details area of the Users page. |
| Reset | The Reset button is used to Reset the password for the users currently listed in the Summary table. It places a tick (✓) in the ☑ Change Password on Next Login Check Box. |
| Archive | In InformationLeader the User Name is not deleted but is archived. The Archive button is used to archive the selected User. This button is enabled only when a User Name is selected in the Summary table. |
| Activate | The Activate button is available in the Archived view and is available only when an archived User has been selected in the Summary table. This button is used to re-activate a previously archived User. |
| Save | The Save button is used to Save the details of a new User. |

**Table 1 –** Fields and Buttons on the Users page of Administration module

**The page has three disabled tabs that are used in an associated software application, and are not utilised in InformationLeader.**

## 3.2 Creating a New User

This section explains how to create a new user in InformationLeader. New Users are created in the User Maintenance Functional Area. The User page is the default page for this Functional area and has been explained in section 3.1. To create a new User:

Administration > User Maintenance > User Page

1. Enter User Name – Following the company's User Name naming convention enter an appropriate User Name.
2. Password – Enter a default password.
3. First Name – Enter the User's First Name.
4. Last Name – Enter the User's Last Name.
5. Email – Enter the email address allocated to the User (optional - if one is allocated)
6. Divisional Role Filter – Select the required Division to be assigned to the User.
7. Available Roles – Select the Role(s) to be assigned to the User (refer to > in Table 1 for information on selecting multiple Roles).
8. > – to add a Role to the Assigned Roles box for the selected Division. The User is assigned this Role within the selected Division.
9. Repeat steps 6 to 8 to assign the User more Divisions and Roles as required.
10. Comment – Enter a comment (optional).
11. Save – to save the User details and create the User.

**When a User is to be assigned the same Role in different Divisions the Role must be assigned for each Division.**

### 3.2.1 Passwords

The Administrator creates a default Password that can be changed by the User. If Windows Authentication is used for the User, the User will still need to Log in into InformationLeader the first time and then enter the identical Password used for Windows login. Thereafter the user will not have to login to InformationLeader.

**If LDAP is enabled when a new user is created the password will default to the key word 'LDAP'. This gives the person creating the user the option of leaving it as 'LDAP'. This indicates that the User is a known Windows User and their password must be checked though the companies Directory Services (LDAP, Active Directory) hence it is not required in InformationLeader. This means that Administrators and Users do not need to remember multiple passwords. It should be noted that not all InformationLeader users will be known to Directory Services so the LDAP can be overwritten with a password and that will work normally.**

InformationLeader supports long passwords of up to 200 characters to support organisations using AD and LDAP authentication which can potentially have long passwords. Users in such organizations can continue using their current long passwords to log into InformationLeader.

## 3.3 Managing a User

The User Maintenance Functional Area is also used for maintaining existing Users by:

- Modifying User Details;
- Resetting Passwords;
- Assigning or Un-assigning Divisions and Roles to a User;
- Archiving a User; and
- Activating an Archived User.

### 3.3.1 Modifying User Details

An existing User's details can be modified by selecting the User in the Summary table to display the User's details in the Detail Area fields. Appropriate modifications to the User's details can be made by modifying the details in the respective fields and then saving the modifications.

### 3.3.2 Resetting Passwords

Passwords can be reset per user, for a selected range of Users or for all users.

#### Changing Individual User Password

Administration Module > User Maintenance > User Page

1. – to select User in Summary table.
2. Password – to enter new Password.
3. ☐ Change Password on Next Login – to ☑ (optional)
4. Save – to save changed password

#### Resetting Multiple Passwords

Passwords for a specific Role or Division, or a specific Role within a specific Division can be reset by:

Administration Module > User Maintenance > User Page

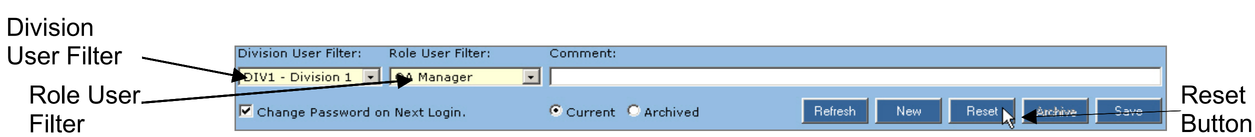



**Figure 3 –** Illustration displaying the Password Reset Filtered by Division and Role

1. Division User Filter ▾ – to select Division
2. AND / OR
3. Role User Filter ▾ – to select Role

4. Reset – to Reset Password
5. OK on Confirming Message

**Clicking the Reset button places a ✓ in the Change Password on Next Login Check Box prompting the User to change the Password on next Login.**

### Resetting All Passwords

To reset the Password for all Users ensure that the 'Division User Filter' and the 'Role User Filter' have 'All selected. Then follow steps 3 to 5 of Resetting Multiple Passwords.

## 3.3.3 Assigning / Un-assigning Division(s) / Role(s)

It may be necessary from time to time to reassign the Divisions and Roles to a User. A User may be assigned additional Divisions and / or Roles or existing Divisions and / or Roles may be un-assigned. To modify the Division / Role assignment to a User:

Administration Module > User Maintenance > User Page

1. – to select User in Summary table.
2. To Assign Additional Roles / Divisions:
   a. Repeat steps 7 and 8 from 'Creating a New User' to assign more roles from within the selected Division to the User.
   b. Repeat steps 6 to 9 from 'Creating a New User' to assign the User more Divisions and Roles as required.
3. To Un-assign an existing Role:
   a. Assigned Roles – to select role to be un-assigned
   b. < – to remove selected role from the Assigned Roles
4. To Un-assign an existing Division:
   a. Repeat step 5 for all Roles belonging to the Division to be un-assigned.
5. Save – to save the modified Division / Role assignment.

## 3.3.4 Archiving Users

In InformationLeader Users are not deleted but archived as deleting a User impacts on the various Forms, Requests, and other aspects of the solution associated with the User. Maintaining a User as an Archived User does not allow the User to access InformationLeader but at the same time maintains an historical record of the User's activities in InformationLeader. To Archive a User:

Administration Module > User Maintenance > User Page

1. – to select User in Summary table.
2. Archive – to Archive the User.
3. OK – to confirm the archiving.

## 3.3.5 Reactivating an Archived User

There may be occasions when an archived User needs to be Re-activated:

Administration Module > User Maintenance > User Page

1. Archived – to select Archived view.
2. – to select User in Summary table.
3. Activate – TO Activate an archived User.
4. OK – to confirm reactivation.

## 3.4 User Maintenance Reports

To assist users InformationLeader incorporates standard reports in various areas of the solution. To assist Administrators a User Access Summary Standard Report has been is available in the Reports drop down in the User Maintenance page of the Administration module. The User Access Summary Report reports on:

- The Divisions and Roles assigned to a User; and
- The Role, Access Level for each Functional Area within each module.

The report provides a summary of a User's assignments within InformationLeader to assist Administrators maintain a successful Permissions system by highlighting any inconsistencies and security gaps.

**The Report does not report on Sub-folder and Document Permissions.**

# 4 Role Maintenance

The Role Maintenance Functional Area of the Administration module is used for creating and managing Roles. Roles may be added, modified or archived from this area and allocated to the appropriate Division or Divisions.

Roles are an important instrument within the InformationLeader solution when permitting access to:

- Modules;
- Sub-modules;
- Documents; and
- Templates.

Roles are also integral:

- To the Request and Job Scheduling systems;
- For escalation of events through automated Alerts;
- For defining Signatories in the InformationLeader solution; and
- For grouping together those employees who share responsibilities and access rights.

It is important that Roles are planned out properly prior to being created. Ideally Roles should be planned keeping in mind:

- The activities and tasks that are to be undertaken in InformationLeader; and
- The level of access that is required by different Users to either complete or review that task.

Roles should then be created to meet these criteria. It is a good business practice to minimise the number of Roles created in InformationLeader for easier management of the system. Roles in InformationLeader do not necessarily represent the roles specified in a Company's Organisation Chart and each InformationLeader Role may on the contrary encompass a number of roles as specified on a Company's Organisational Chart.

## 4.1 Roles Page

The Roles page is the default page for the Roles Maintenance Functional Area and is used for creating and managing Roles.

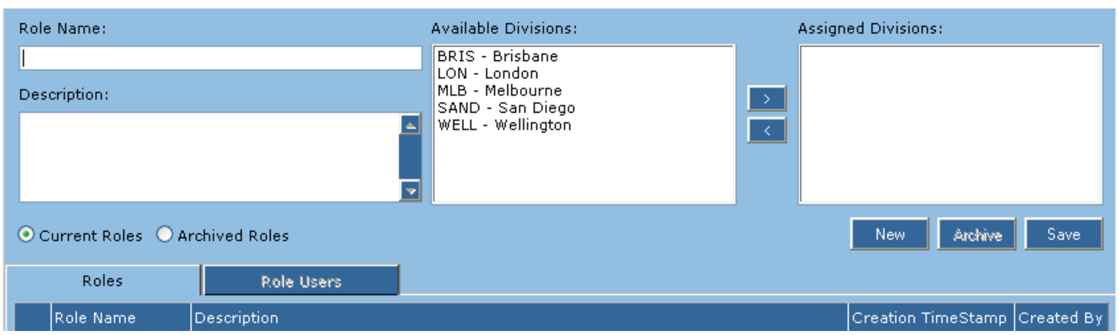



**Figure 4 –** Roles page Details Area

| Fields / Buttons | Description |
|---|---|
| Role Name | The unique name for the Role. If a Role is not selected in the summary grid on the page, this field will be blank. New Roles are created by entering a new Role name in this field. |
| Description | The detailed description of the Role. If a Role is not selected in the summary grid on the page, this field will be blank. When a new Role is created the Role description is entered in this field |
| Available Divisions | The list of Divisions that can be assigned to the Role selected in the grid.<br>Roles are global and independent of a Division. When a Division is archived, InformationLeader automatically removes the Division from the list of Available Divisions for the current Role. |
| Assigned Divisions | The list of Divisions that are assigned to the Role selected in the grid.<br>If an archived Division is reactivated, InformationLeader automatically assigns the Division to the Role(s) it was |

| Fields / Buttons | Description |
|---|---|
| | assigned to prior to being archived. |
| Current Roles / Archived Roles | The Current and Archived Radio buttons are selected to present the respective views in the Summary Table. The buttons are mutually exclusive, i.e. both buttons cannot be selected at the same time. The Current Radio Button is selected by default. |
| > | Assigns the Division(s) selected in the Available Divisions field to the Role. It is mandatory to assign at least one Division to a Role.<br>To select more than one Division in this field, click on the first Division you wish to assign, hold down the Ctrl key on your keyboard and then click on the other Division(s) required.<br>To select consecutive Divisions, click on the first Division you wish to assign, hold down the Shift key on your keyboard and then click on the last Division required in the list.<br>The assigned Division(s) will then display in the Assigned Divisions field. |
| < | Removes the Division(s) selected in the Assigned Divisions field from the Role. To select multiple Divisions use the same steps described above. |
| New | Clears the Role details fields to enable a new Role to be created. |
| Archive | Archives the Role selected in the Summary table. The Archive button is enabled only when a Role is selected in the Summary table. This button changes to Activate when the Archived Roles radio control is selected. |
| Activate | Reactivates an archived Role selected in the Summary table in the Archive view. The Activate button is enabled only when a Role is selected in the Summary table. This button changes to Archive when the Archived Roles radio control is selected. |
| Save | Saves new or changed details for a Role. |

**Table 2 –** Description of fields and buttons used on Roles page Details Area

## 4.2 Creating a New Role

This section explains how to create a new Role in InformationLeader. New Roles are created in the Role Maintenance Functional Area. The Role page is the default page for this Functional area and has been explained in section 4.1. To create a new Role:

Administration > Role Maintenance > Roles Page

1. Role Name – enter the Role name.
2. Description – enter a description of the Role, e.g. 'Super User Role for Admin users (This user can access everything in the database)'.

3. Available Divisions – to select Divisions (refer to explanation for > in Table 2 for selecting multiple Divisions).
4. > – to add Role to selected Division(s) and display the assigned Divisions in the 'Assigned Divisions' field.
5. Save – to save the Role details and create the Role.

## 4.3 Managing a Role

The Role Maintenance Functional Area is also used for maintaining existing Roles by:

- Modifying Details;
- Assigning or Un-assigning Divisions to a Role;
- Archiving a Role; and
- Activating an Archived Role.

### 4.3.1 Modifying Role Details

An existing Role's details can be modified by selecting the Role in the Summary table to display the Role's details in the Detail Area fields. Appropriate modifications to the Role Name and Description can be made by modifying the details in the respective fields and then saving the modifications.

### 4.3.2 Assigning / Un-assigning Division(s)

It may be necessary from time to time to reassign the Divisions assigned to a Role. A Role may be assigned additional Divisions or existing Divisions may be un-assigned. To modify the Division assignment to a Role:

Administration Module > Role Maintenance > Role Page

1. – to select Role in Summary table.
2. To Assign Additional Divisions:
   a. Repeat steps 3 and 4 from 'Creating a New Role'
3. To Un-assign an existing Division(s):
   a. Assigned Division(s) – to select Division(s) to be un-assigned (refer to explanation in Table 2 for selecting multiple Divisions).
   b. < – to remove selected Division from the Assigned Division
4. Save – to save the modified Division assignment.

### 4.3.3 Archiving Role(s)

In InformationLeader Roles are not deleted but archived as deleting a Role impacts on the various Forms, Requests, and other aspects of the solution associated with the Role(s). Maintaining a Role as an Archived Role removes it from the list of available Roles in the application thereby not allowing access to the Role, but at the same time maintains an historical record of the Role's activities in InformationLeader.

**It is important that all Users assigned to the Role are first un-assigned from the role before archiving it. (Roles with assigned Users cannot be archived)**

To Archive a Role:

Administration Module > Role Maintenance > Roles Page

1. – to select Role in Summary table.
2. Archive – to Archive the Role.
3. OK – to confirm the archiving.

### 4.3.4 Reactivating an Archived Role

There may be occasions when an archived Role needs to be Re-activated:

Administration Module > Role Maintenance > Roles Page

1. Archived – to select Archived view.
2. – to select Role in Summary table.
3. Activate – to Activate an archived Role.
4. OK – to confirm reactivation.

## 4.4 Roles Page Tabs

The Roles page has two tabs:

- Roles; and
- Role Users.

The default Roles Tab displays the Summary table displaying all Roles. Selecting a Role in the Summary table and the clicking the Role Users Tab displays the Users assigned to the Role selected in the Roles Tab. When the Roles Tab is selected the fields in the Details Area display the information for the selected Role. The fields are disabled and are non-editable in this view. The Role Tab is enabled only when a Role is selected in the Summary table. The Role Users tab is disabled in the Archive view as no Users are assigned to archived Roles.

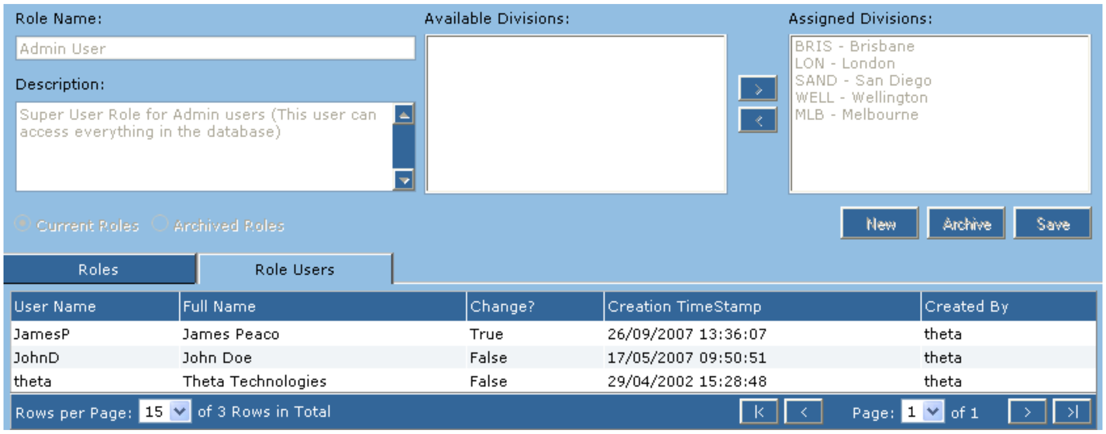



**Figure 5 –** Role Users Tab displaying Users assigned to the selected Role (Admin User)

# 5 Role Permissions

Each Role created in InformationLeader is assigned Role Permissions. Role Permissions determine the level of authorisation that a User has to access and interact with different:

- Modules;
- Sub-modules;
- Functional areas within these modules;
- Form Instances, Requests and Reports created from specific templates; and
- Document Folders and individual documents.

The Role Permissions are assigned to Roles and the Roles in turn are assigned to Users. InformationLeader has three levels of Role Permissions that apply to all the modules and functionalities available in InformationLeader:

- – No Access – access is denied and depending upon the InformationLeader area may not appear, or be disabled and non-editable;
- – Read Only Access – access is given to only view the respective InformationLeader area; and
- – Write Access – the user can view and edit the InformationLeader areas for which they have this level of access.

In addition to the above three Role Permissions there are two additional Role Permissions available only for the Forms module:

- – Creator / Owner Access – this permission only allows access to the creator / owner of the Form Instance; and

- – Report Access – this permission only allows access to Reports associated with the Form Template for a given Division Organisational Area combination.

1. **There are specific rules that apply to the Creator / Owner Permission which are explained later within the Role Permissions section.**
2. **A user assigned a Role with Report Access can only view the data presented in the Report associated with the Form Template and cannot view the Form Template structure or other data in the Form Instances. They cannot access the Form Template or Form Instances through a Form Search.**

It is common for InformationLeader Users to be assigned multiple Roles. Each of the assigned Roles can have different levels of access to various areas of InformationLeader. In such an instance the highest access allowed to the User for the particular InformationLeader functionality through all the assigned Roles is applicable. E.g. if a User is assigned with two Roles one Role having (No Access) and the other Role having (Write Access), then the access level is applicable to the User.

In the Role Permissions Functional area permissions can be configured to determine the access level to:

- Individual InformationLeader Modules;
- Individual InformationLeader Builder Sub-modules;
- Each Functional areas within these modules and Sub-modules;
- Form Instances created from specific Form Templates;
- Requests created from specific Request Templates;
- Reports based Report Templates and on permissions set for associated Form Templates;
- Document Folder and individual Documents.

The Role Permissions assigned to a role become the default permissions for that role. However InformationLeader is flexible in allowing the Role Permissions to be reset for individual templates at the template level and at the Folder and Document level from within the respective modules.

**Permissions for access to Modules, Sub-modules and Functional Areas can only be set in the Roles Permissions Functional area. For a module to be accessible to a Role, the Role must have at least one functionality set at a minimum access level for the module.**

Role Permissions are set separately for each InformationLeader module hence a Role can be assigned different levels of access to different areas of the solution. Role Permissions play an important part in InformationLeader and it is important that these must be assigned after giving due consideration to the level of access that a Role would require in different areas of the solution.

When assigning Roles it must be remembered that Role Permissions are assigned at a global level, i.e. a Role will have the same Permission access level across all Divisions it is assigned to.

Every new Role created in InformationLeader is assigned:

- as the default access to all Folders and Documents in the Documents module; and
- as the default access level for the rest of the InformationLeader solution.

This default Role Permission is reconfigured in the Role Permissions Functional area.

**Rules specific to the Creator / Owner Role Permission**

The Creator / Owner access Role Permission provides a greater level of confidentiality wherever required, e.g. all employees within an organisation can be assigned to an Employee Role and have access to a Timesheet Form Template, but only the Creator / Owner of a Timesheet can view their own Timesheet Form Instance. Supervisors / Managers can be associated with a Supervisory / Management Role with Read / Write access to the Timesheet Form Template to give them access to the Timesheet Form Instances of the employees they supervise / manage.

The affects of applying the Creator / Owner access Role Permissions under various scenarios s explained below:

- Assigning this Role Permission ensures that only the creator / owner of the Form Instance or a user associated with a Role that either has the Read Only access or Write access to the Form Template can:
    - View the Form Instances in the Form Summary;
    - Return the Form Instances as part of the Search Forms results;
    - Can navigate to it from another Form Instance using the Ref button or from a Controlling Request;
    - Make the Link Item in a 'Referring' form editable when the 'Select Permissions' property has been set to 'True';
    - Permit a user from the 'Referring' form to use the Link Indicator to navigate to the 'Referred To' form when the 'Link Permissions' property has been set to 'True'; and
    - Include the Form Instances as Sample Data for reports; and
- Users associated with different Roles that allow Read Only access and Creator / Owner access to a Form Instance can edit the Form Instances created by them as the creator / owner, but can only read Form Instances created by others.

## 5.1 Role Permissions Page

The default Role Permissions page is divided into two areas:

- The Role / Module Detail Area is used to select different Modules and Roles;
- The Permissions Setting Area used to configure the Permissions for the selected Role in the different areas within the selected Module of InformationLeader. This area is further sub-divided into three tabs used for:
  - Functional Areas;
  - Templates; and
  - Documents.

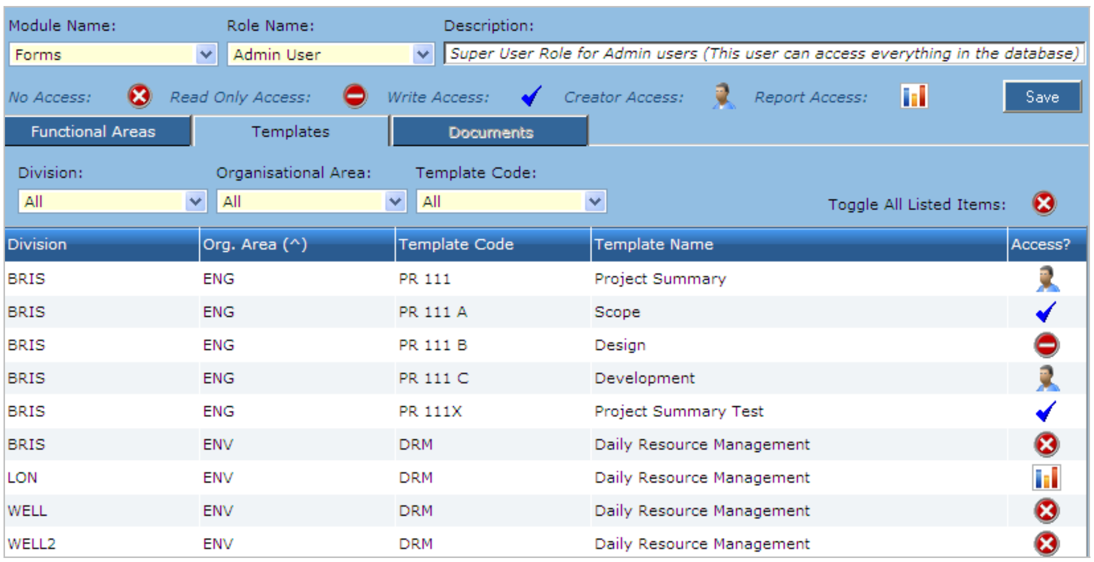



**Figure 6 –** Role Permissions page

On saving the permissions, it is now possible to sort the Role Permissions in the Summary table (in ascending / descending order) by clicking the Access column header. This provides a quick preview of the respective Access levels assigned as Role Permissions to different Roles within the selected functional area and Module as illustrated in Figure 6.

| Field / Button | Description |
|---|---|
| Module Name | The Module Name Drop down lists all the Module and Sub-modules in InformationLeader. Selecting the Module activates the relevant tabs in the Permissions Setting area of the Role Permissions page allowing configuration of permissions. |
| Role Name | The Role Name Drop down lists all the existing Roles created within InformationLeader. Selecting a Role allows configuring the Role Permissions for that Role across the different areas of InformationLeader. |
| Description | This is a non-editable field displaying the Description of the |

| Field / Button | Description |
|---|---|
| | selected Role. |
| Save | The Save button is used to save the Role Permissions after these have been configured. |
| Toggle All Listed Items: | Toggles all the Role Permissions listed in the Summary table to the same setting as the displayed button. |
| | Indicates that Role Permissions have been altered and must be saved for these to take affect. |

**Table 3 –** Description of Role Permissions Fields and Buttons

## 5.2 Assigning Role Permissions

Assigning Role Permission in InformationLeader requires addressing the different aspects and functionality of each area of the solution. Hence there are some differences in how Role Permissions are configured for different Modules or Sub-modules. These different procedures of setting Role Permissions can be broadly grouped into four procedures:

- The Administration and Builder modules;
- The Forms and the Reports modules;
- The Requests module; and
- The Documents module.

Each of these procedures is explained in the following sections.

### 5.2.1 Assigning Permissions to Administration and Builder Modules

The procedure mentioned here is used for setting Permissions for the Administration module and for each of the Sub-modules in the Builder module, i.e. Forms, Request and Reports Template Builders:

**The Access Level Buttons work as a toggle button, i.e. successive clicking changes the button to represent another access level in the following Order:**

- **Default – ;**
- **First Click – ;**
- **Second Click –/ (Forms / Templates tab only);**
- **Third Click – /; ( Forms / Templates tab only);**
- **Fourth Click – ( Forms / Templates tab only);**
- **Fifth Click – ( Forms / Templates tab only);**
- **Subsequent clicks follow the above sequence.**

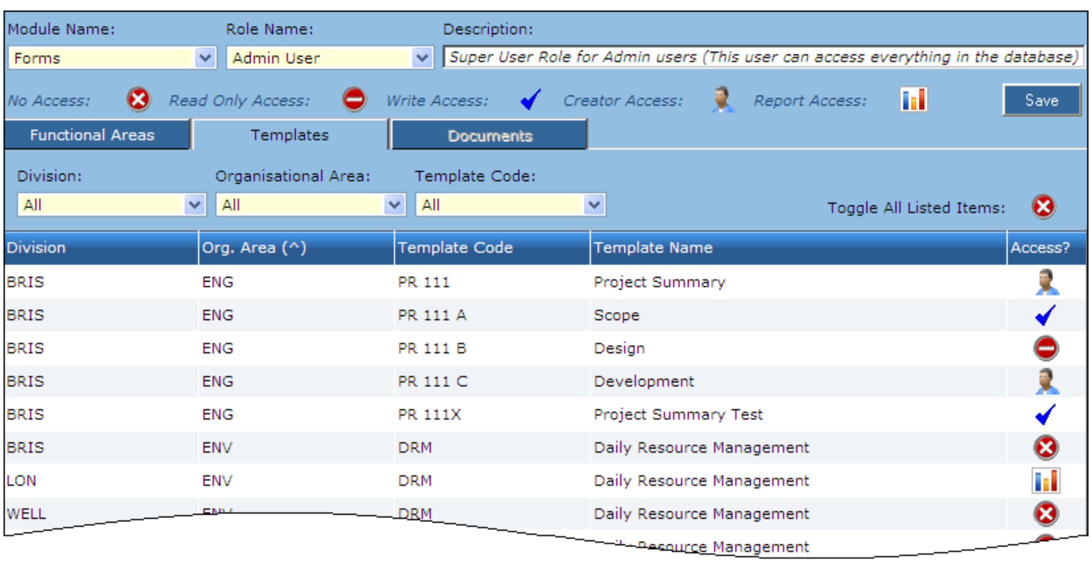
Administration > Role Permissions > Role Permissions Page

1. Module Name – to select a module from the Drop down to which the Role Permissions are to be applied. Displays the Functional Areas of the selected module in the Summary table (see Figure 6).
2. Role Name – to select the Role for which the Role Permissions are to be set.
3. Assign Role Permission by:
   a. Toggle All Listed Items: – to change permissions for all Functional areas;
   OR
   b. / / in each Summary table row – to individually set the appropriate Role Permissions against each individual Functional area.
4. Save – to save Role Permissions.

**A symbol left of the Save button indicates that the Role Permissions have not been saved. It is important that the Role Permission set for each Role for each module is saved before selecting another module or role. All unsaved changes are lost upon navigating away from the page or the page being refreshed.**

## 5.2.2 Assigning Permissions to Forms and Reports Modules

Role Permission for Forms and Reports can be set for access to the Functional Areas as well as for the individual templates. Selecting Forms or Reports in the 'Module Name' field displays the respective Functional areas for the module and activates the 'Templates' tab. The 'Templates' tab lists all the current templates for that module.




| Division | Org. Area (^) | Template Code | Template Name | Access? |
|---|---|---|---|---|
| BRIS | ENG | PR 111 | Project Summary | |
| BRIS | ENG | PR 111 A | Scope | |
| BRIS | ENG | PR 111 B | Design | |
| BRIS | ENG | PR 111 C | Development | |
| BRIS | ENG | PR 111X | Project Summary Test | |
| BRIS | ENV | DRM | Daily Resource Management | |
| LON | ENV | DRM | Daily Resource Management | |
| WELL | ENV | DRM | Daily Resource Management | |

**Figure 7 –** Templates Tab in Role Permissions page

The Templates tab includes filtering fields that facilitate listing only relevant templates in the Summary table. The templates displayed in the Summary table can be filtered by any one, or a combination of any two or all of the following:

- Division;

- Organisational Area; and
- Template Code.

The following procedure illustrated for Forms is also applicable for Reports:

Administration > Role Permissions > Role Permissions Page

To Set Module Role Permissions:

1. Follow steps 1 to 4 of Assigning Permissions to Administration and Builder modules;

To set Template Role Permission:

2. Template tab – to activate the tab listing templates.
3. Filter templates displayed in Summary table (optional).
4. Follow steps 3 and 4 for setting Role Permissions.

### 5.2.3 Assigning Permissions for Requests

The steps to assign Role Permissions for Requests are similar to Forms. However the Templates tab for Requests includes an additional level of permissions that allow a Role to close a Request. Only Roles assigned the permission to close the Request can assign the last Status in a Request (refer to the section on Requests module for more information on closing Requests). This is to ensure that a Request is not prematurely closed and only the authorised Users can close the Request.

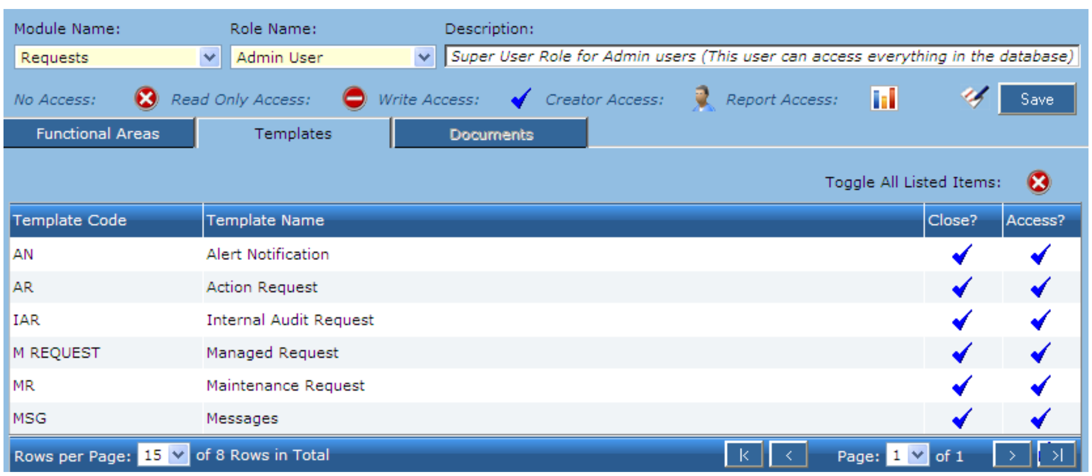



**Figure 8 –** Templates Tab in Role Permissions page for Requests

The Summary table in the Templates tab for Requests includes an additional column for setting permissions to allow closing Requests. The Permissions for closing Requests are individually set for each Request Type.

### 5.2.4 Assigning Permissions for Documents

Selecting Documents in the Module Name field allows setting Role Permissions for accessing the Documents module, its functional areas as well as for setting permissions to individual folders and files.

Setting permissions for accessing the Documents module Functional areas is the same as for the Functional areas of other modules. However when Documents is selected in the Module Name field it also activates the Documents tab.

The Documents Tab lists all Current Document Folders and all Current (Released and Draft) Documents available in the Documents module.

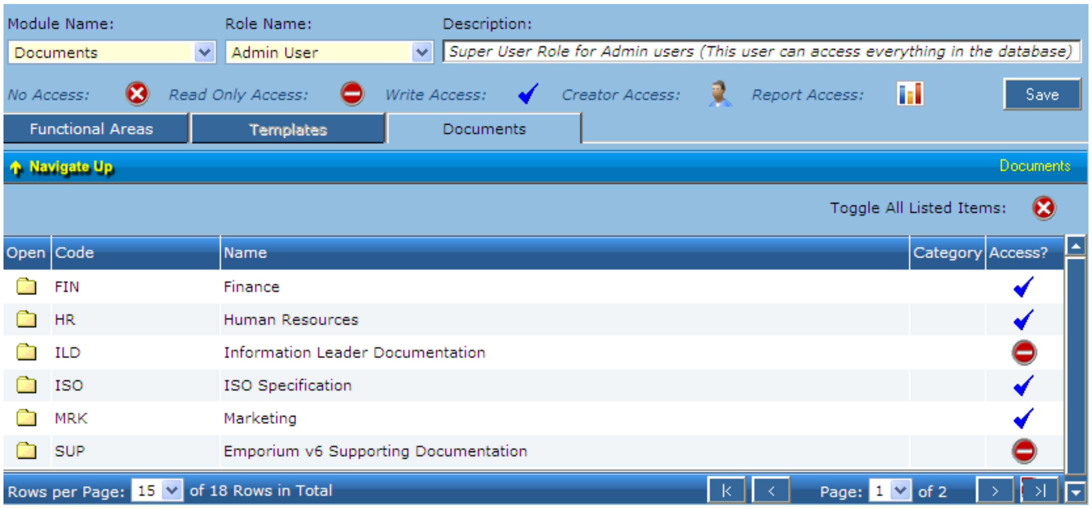



**Figure 9 –** Documents Tab in Role Permissions page for Documents

The Role Permissions are set for each Folder, Sub-folder or Document, allowing user interaction to the extent allowed by the set Role Permission. The User / Role can:

- Add new Folders and Documents at the root level of the Documents Index; and
- In any Folder or Sub-folder that they can access they can:
    - Read and / or edit documents subject to their Role Permissions; and
    - Add new Sub-folder and Documents.

However Recursive permissions apply to the Documents module to prevent non-authorised access to Folders and Documents through searches or by browsing the Document module's tree structure. This means that a User cannot access through a search or by browsing any Folder / Sub-folder and its contents for which their Role Permissions have been set to . This can be explained through the aid of the following illustration where the User has access only to the highlighted Folders, Sub-folders and Documents.

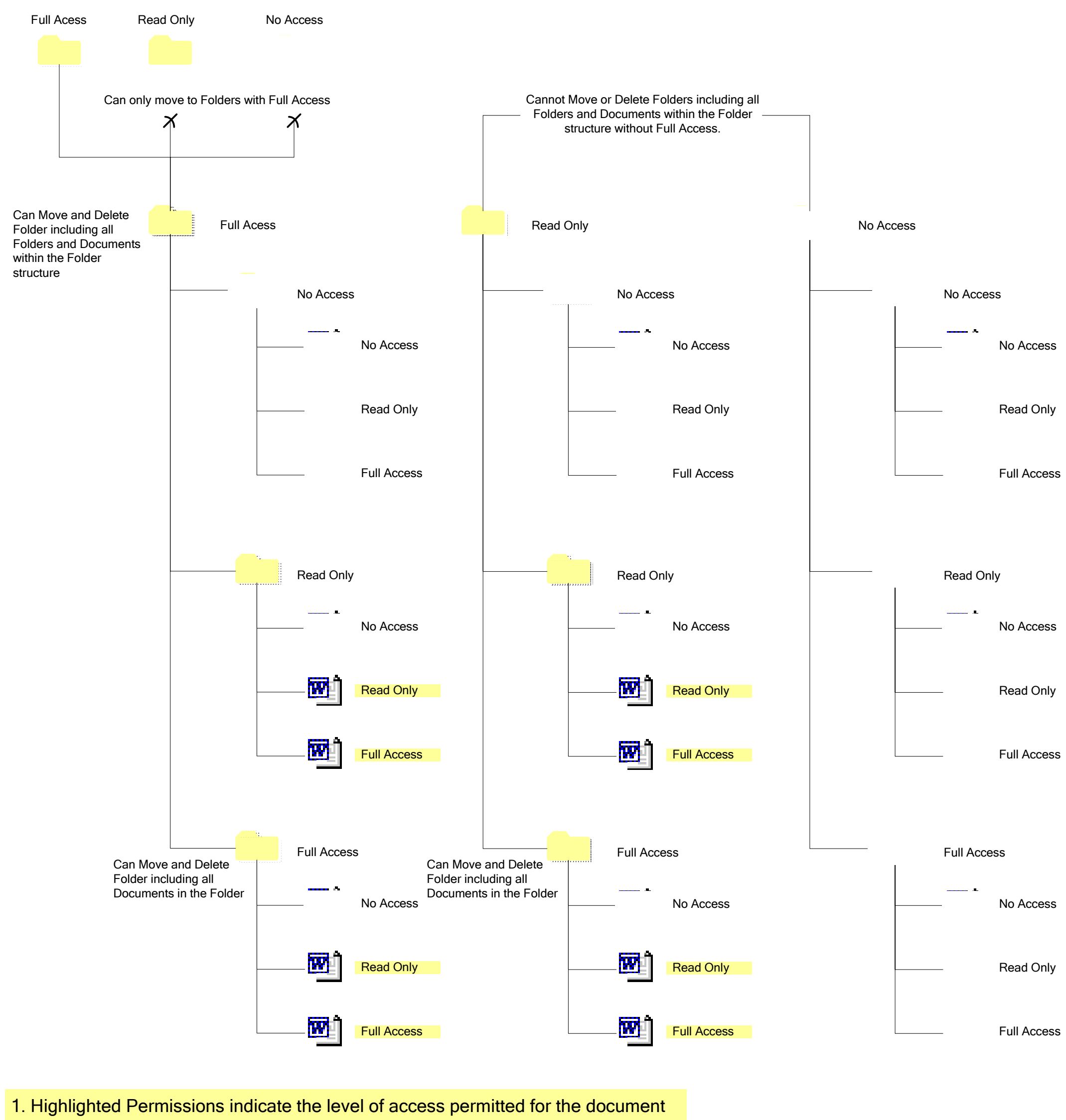



**Figure 10** – Document Permissions

The Role Permissions for Folders, Sub-folders and Documents can be set either individually by changing the Role Permissions in the respective Summary table row, or for all the listed items in the Summary table by using the Toggle All Listed Items: button.

# 6 Divisions

The areas of an organisation implementing InformationLeader are divided into Divisions. Divisions in InformationLeader need not necessarily follow the divisional set up of an organisational chart. Segregation and categorisation of company data for the purpose of security, access and reporting of information determine the use of Divisions in InformationLeader. It is quite feasible for a small organisation with only a few employees who perform across multiple organisational roles to have only one Division. On the other hand well-structured large organisations will have a number of Divisions determined by their requirements for security, access and reporting of information. Such organisations having a number of sites or subsidiaries in the same business and all following the same company procedures, organisational areas and forms can easily be segregated into InformationLeader Divisions.

The first step of implementing InformationLeader is to create InformationLeader Divisions. Divisions are created in the Divisional Functional Area of the Administration module.

## 6.1 Divisions Maintenance Page

The Division s Maintenance page is used to create and maintain Divisions. The page contains three tabs:

- Summary;
- Profiles; and
- Non-Working Days

### 6.1.1 Summary

The Summary tab is used to create the InformationLeader division by assigning it the appropriate Code and Name. Once a division is created and saved it is displayed in the Summary tab.

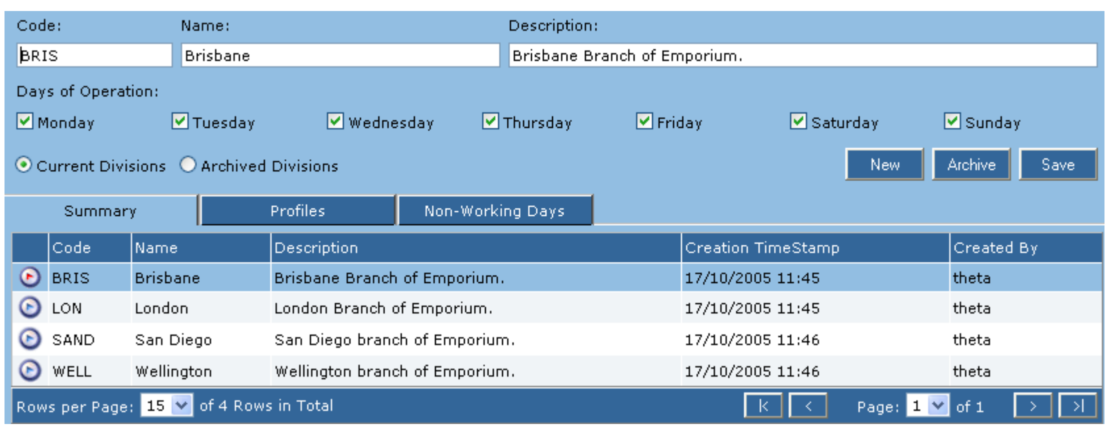



**Figure 11 –** Division Maintenance Page – Summary Tab

| Fields / Buttons | Description |
|---|---|
| Code | This field is used to enter / display the Division Code. As with other areas of the InformationLeader solution the code is unique to each division. It should be short and representative of the Division Name. |
| Name | The Division Name is more descriptive and identifies the division to the users. |
| Description | The Description is used to give a brief description of the division. |
| Days of Operation | The Days of Operation are a series of Check Boxes. Each Check Box represents one day of the week. A ticked Check Box indicates that the |

| Fields / Buttons | Description |
|---|---|
| | respective day of the week is a working day. All the Check Boxes are checked by default. Un-tick a Check Box to mark that day as a non-working day for the division. |
| Current Divisions | The Current Divisions is selected by default to display the currently available divisions in the Summary table. |
| Archived Divisions | Select Archived Divisions to view divisions that have been archived and no longer available to InformationLeader. The Archived view displays an Activate button. Selecting an Archived Division and clicking the Activate button un-archives the division and it becomes available to the InformationLeader solution. |
| New | Clicking the New button refreshes the fields and presents blank fields. This button is used when a division is selected in the Summary table and the fields displaying the selected division's details need to be cleared to create a new division. |
| Archive | Selecting a division in the Summary table and clicking the Archive button will archive the selected Division. The archived division will no longer be available to the InformationLeader solution. |
| Save | The Save button is used to save a new or the details of an edited Division. |

**Table 4 –** Fields & Buttons Division Maintenance Page – Summary Tab

**Archiving of a division will not allow access to any Forms, Requests, Reports or Documents associated with that Division. Any Users assigned only to the Archived Division will not be able to Log into the InformationLeader solution. The InformationLeader solution will behave as if the Archived Division does not exist.**

### 6.1.2 Profiles

The Profiles tab is used to create the Division profile. Details such as Plant Name, Address, and other contact details can be entered to create a Division Profile. These details are then available as the Company Profile field defaults to a Form.

The Profile Items tend to be standard items required in headers or footers of forms and reports such as Company Name, Plant Name, Addresses and Contact Details. By including a Company Profile field in a Form Template the user does not have to enter the same standard information for each Form Instance. Similarly Company Profile fields can be used in the Header Footers of Reports.

In the event that any of the details incorporated into a Company Profile field have changed, such as a change in the address, then these changes need to be made only once in the relevant Company Profile field(s). The change made to the field is then available globally to all active forms. To affect the change in a form the form must be opened for the Company Profile field to be automatically populated with the new details and then saved before closing. The same stands true when any of the details are removed from a Profile filed.

Similarly the new details will be reflected in a report only once these have been updated in the relevant forms. Company Profiles are generally used in Report Headers for reporting on singe Form Instances.

It is possible to add a new Company Profile at any time or delete an existing Company Profile. The relevant Form Templates will then need to be revised to either add a new Company Profile field or to delete an existing field from the template.

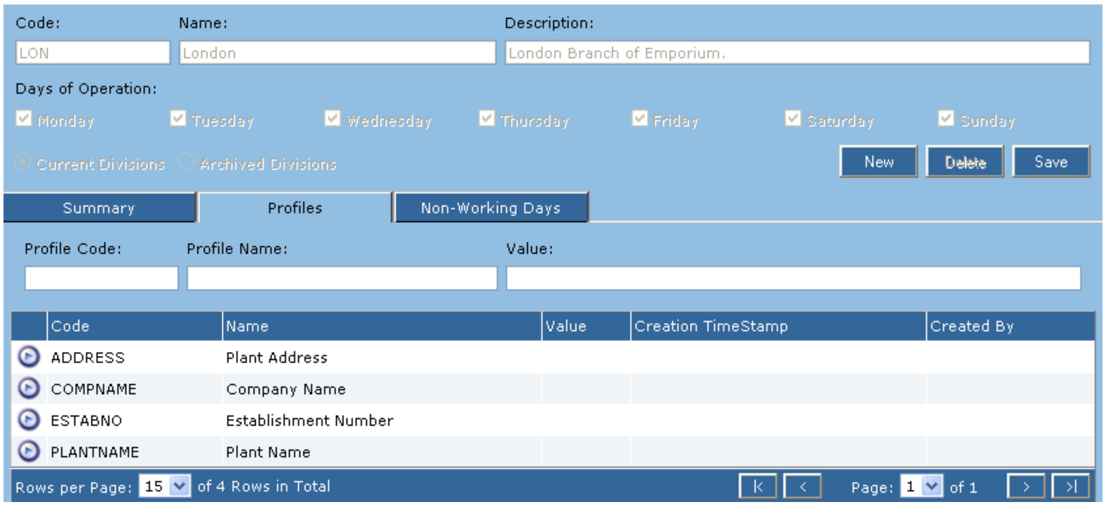



**Figure 12 –** Division Maintenance Page – Profiles Tab

| Fields / Buttons | Description |
|---|---|
| Profile Code | Enter a relevant code for the Profile keeping in mind that the code should be short and represent the Profile Name. |
| Profile Name | This is the name that is designated to the profile, e.g. address |
| Value | Enter the details for the profile, such as the address for the address profile. |
| New | Clicking the New button refreshes the fields and presents blank fields. This button is used when a profile is selected in the Summary table and the fields displaying the selected profile's details need to be cleared to create a new profile. |
| Delete | Selecting a profile in the summary table and clicking the Delete button deletes the selected profile. |
| Save | The Save button is used to save a new or the details of an edited profile. |

**Table 5 –** Fields & Buttons Division Maintenance Page – Profile Tab

### 6.1.3 Non-Working Days

The Non-Working Days tab is used to designate dates on which the division will not operate. The Non-Working Days are entered for a Division to ensure that no Scheduled Jobs or Follow-up Alerts are generated on these days.

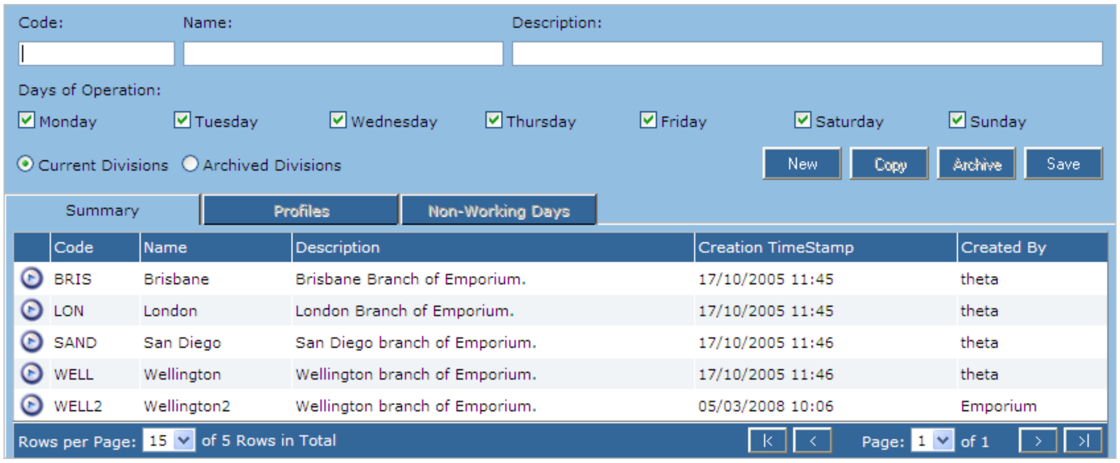



**Figure 13 –** Division Maintenance Page – Non-Working Days Tab

| Fields / Buttons | Description |
|---|---|
| Non-Working Date | This is a Date Picker field used to set Non-Working dates for the Division. |
| Description | Enter a brief description informing the reason for that date being marked as a Non-Working Day. |
| New | Clicking the New button refreshes the fields and presents blank fields. This button is used when a date is selected in the Summary table and the fields displaying the selected date's details need to be cleared to create a new Non-Working Date. |
| Copy | Highlighting a Division in the Summary table enables this button allowing copying of the Division with all its details. |
| Delete | Selecting a Non-Working Date in the summary table and clicking the Delete button deletes the selected Non-Working Date. |
| Save | The Save button is used to save a new or the details of an edited Non-Working Date. |

**Table 6 –** Fields & Buttons Division Maintenance Page – Non-Working Days Tab

## 6.2 Procedure for Creating a New Division

The steps to create a new Division and configuring it are given below:

Administration > Divisions > Summary Tab

1. Code – enter a relevant Code for the Division
2. Name – enter an appropriate name for the Division
3. Description – enter a brief description of the Division
4. Days of Operation – un-tick the days of the week on which the Division will not be working
5. Save – to save the Division
6. Profiles Tab
7. Profile Code – enter a relevant code for the Profile

8. Name – enter an appropriate name for the Profile
9. Value – enter the value that will appear in the Company Profile field of a form
10. Save – to save the Profile
11. Repeat steps 7 to 10 for each additional profile
12. Non-Working Days Tab
13. Non-Working Date – to set the date that will be a non-working date within the Division
14. Description – enter a brief description about the Non-Working Date
15. Save – to save the Non-Working Date
16. Repeat steps 13 to 15 for each additional Non-Working Date
17. Repeat above steps for each new Division required

## 6.3 Copying Divisions

It is very common for sites with multiple Divisions to have the same or similar details for each Division. To facilitate the easy creation of Divisions InformationLeader facilitates copying Divisions including:

- Non-Working Days;
- Organisation Area assignments;
- Role assignments;
- Form Template assignments;
- Form Template permissions;
- Divisional Managed Lists (just the list, not the items); and
- Divisional Document assignments.

### 6.3.1 Procedure to Copy a Division

Administration > Divisions

1. Divisions Summary table to select the division to be copied
2. Code – Overwrite the Code of the division to be copied with a code for the new division
3. Name – Overwrite the Name of the division to be copied with a name for the new division
4. Description – Overwrite the Description of the division to be copied with a description for the new division
5. Copy to copy the division
6. Remember to assign Users to the new Division and if any Divisional Managed Lists have been copied then add List Items and Item Details to the Managed List.

# 7 Organisational Areas

Organisational Areas are the categorisation of functional areas within a Division. The same Organisational Area can be present in one or more Divisions in a multi-division configuration. E.g. The HR, Production, and Accounts organisational Areas can be common areas available across all Divisions. The Organisational Areas are created, assigned and maintained using the Organisational Areas page.

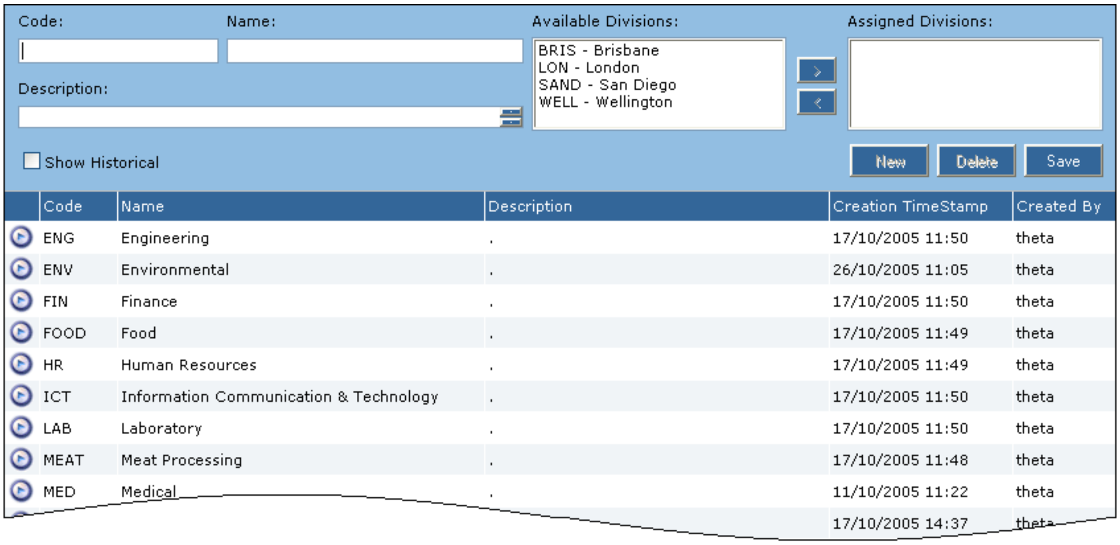



**Figure 14 –** Organisational Areas Page

| Fields / Buttons | Description |
|---|---|
| Code | This field is used to enter / display the Organisational Area Code. As with other areas of the InformationLeader solution the code is unique to each Organisational Area. It should be short and representative of the Organisational Area Name. |
| Name | The Organisational Area Name is more descriptive and identifies the Organisational Area to the users. |
| Description | The Description is used to give a brief description of the Organisational Area. |
| Available Divisions | This Selection Window lists all the Divisions available to the InformationLeader solution. One or more divisions can be selected in this window. Once a Division is assigned to the Organisational Area it is no longer displayed in this window. |
| Assigned Divisions | This Selection Window lists all Divisions to which the Organisational is assigned to. |
| Show Historical | Placing a tick in the Show Historical Check Box displays the Organisational Area Summary table in historical view. This view displays all current and deleted Organisational Areas. A C displayed against an Organisational Area row in the Summary table indicates that this is a Current Organisational Area. A D displayed against an Organisational Area row in the Summary table indicates that this is a deleted Organisational Area. |
| > | This button is used to add the Divisions selected in the Available Divisions Selection Window to the Assigned Divisions Selection Window. |
| < | This button is used to remove a Division selected in the Assigned Divisions Selection Window and display it in the Available Divisions Selection Window. Once a division is removed from the Assigned |

| Fields / Buttons | Description |
|---|---|
| | Divisions Selection Window it is no longer assigned to the Organisational Area. |
| New | This button is used to refresh the fields and display blank fields for creating a new Organisational Area. |
| Delete | Selecting an Organisational Area from the Summary table in the current View and clicking the Delete button deletes the Organisational Area provided it is not used by any current template. Once an Organisational Area is deleted it is displayed in the Historical view with a D displayed against it. |
| Save | The Save button is used to save a new ore an edited Organisational Area. |

**Table 7 –** Fields & Buttons in the Organisational Areas Page

## 7.1 Procedure to Create a New Organisational Area

Administration > Organisational Areas

1. Code – enter a relevant Code for the Organisational Area
2. Name – enter an appropriate name for the Organisational Area
3. Description – enter a brief description of the Organisational Area
4. Available Divisions Selection Window – select required divisions
5. > button – to assign Organisational Area to selected divisions and to display these in the Assigned Divisions Selection Window
6. Save – to save the Organisational Area
7. Repeat above steps for each new Organisational Area required

# 8 Managed Lists

Managed Lists are global lists that can be used in all Forms across the InformationLeader solution. These lists are:

- Created once in the Managed Lists Functional area of the Administration module;
- Centrally managed and maintained;
- Available across all Divisions unless specifically assigned to one Division;
- Modified / altered once for the changes to be reflected across all future use of the List across the solution;
- Revisional, i.e. the solution maintains a history of all the changes made to a Managed List since its creation and then uses the appropriate revision of the Managed List in a Form Instance – this basically means that the Managed List is represented on a Form Instance as it was when the Form was created;
- Generally static lists not frequently updated, such as lists for ‘Days of Week’, ‘Months in a Year’, and ‘Customer name and contact details’; and

- Accessible to all Roles having access to the Managed Lists Functional Area in the Administration module.

All Managed Lists are listed in the Managed Lists Summary table except for two System Managed Lists

- Roles; and
- Users

The contents of these two lists are created and maintained in the ‘Role Maintenance’ and the ‘User Maintenance’ Functional areas of the Administration module. These are also the only two Managed Lists that are available to other InformationLeader modules besides the Forms and the Form Builder modules.

All other Managed Lists are created and managed in the Managed Lists Functional area of the Administration module and available only to the Forms Form Builder and the Reports modules. In Form Instances the Managed Lists are presented as Drop down or Multiselect Lists.

There are two types of managed Lists:

- Alphanumeric Managed Lists; and
- Numeric Managed Lists.

The Numeric Managed List must have a numeric ‘List Items’ Code. This allows the Code to be used for calculations as part of a Formula, e.g. it is a common practice to have the assessment criteria in a Hygiene Assessment Form as a Numeric Managed List where the ‘List Item’ Code represents the weight given to each assessment criteria. This is then used to calculate the defect rates. In all other respects the Numeric Managed Lists and the Alphanumeric Managed Lists are the same.

A Managed List can have up to two levels of detail:

- List Item; and
- Item Details

A List Item is a simple List of Codes and Names with a brief optional description.

An Item Detail gives further details about the List Items. Item Details are optional and need not be entered in a list where only the first level of detail is required. Any number of Item Details can be created for Managed Lists requiring the second level of detail. It must however be remembered that the Item Details are created for all List Items, i.e. once an Item Detail has been created for one List Item, then it is available for all List Items in that Managed List. The values for the Item Details can vary for each List Item. This can be easily demonstrated through the example of a Product List Managed List scenario that has been used in the Form Builder:

- The Product List giving the Product Code and the Product Name is the first level, i.e. the List Items; and

- The details such as Size, Packaging Type and Price are the second level of detail, i.e. the Item Details. Each List Item, i.e. each product List Item will have the same fields (Item Details), i.e. Size, Packaging Type and Price, but the values for each List Item will be different.

## 8.1 Managed List Maintenance Page

The default Managed List Maintenance page is accessed by selecting Managed Lists in the Administration module Index. This page displays the Summary table listing the available Managed Lists and is used for creating new Managed Lists. The Managed Lists Maintenance page has different interfaces that are used depending up on the task at hand:

- The default Managed List interface displaying a Summary table listing all the current managed Lists;
- The List Item interface;
- The Item Details interface;
- The Historical View interface; and
- The Import/Export interface.

The default Managed List interface displaying the Summary table in the active Lists tab is explained below in Figure 15 and in Table 8.

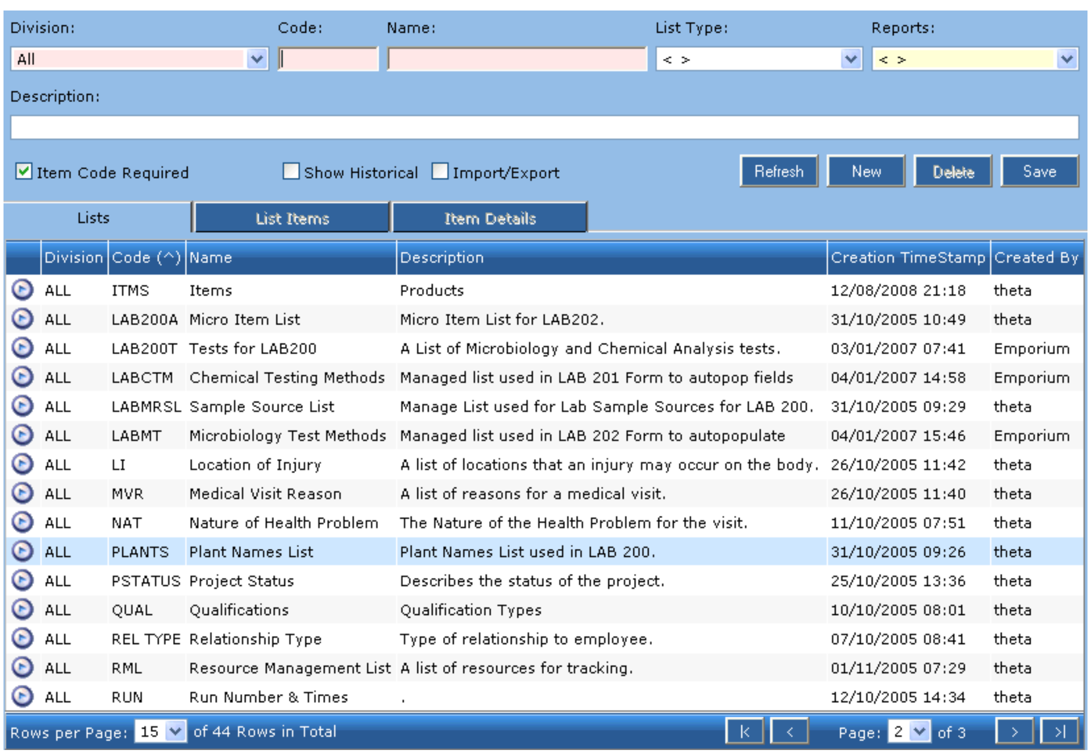



**Figure 15 –** Default Managed List Maintenance page

| Fields / Buttons | Description |
|---|---|
| Division | A Managed List can be assigned either to one Division or to All Divisions in the InformationLeader domain. A Managed List created for multiple Divisions cannot be changed to a single Division Managed List. However a Managed List created for a single Division can be changed to All Divisions. The reasons being that a multiple Division Managed List may be in use by one or more Forms Templates in different divisions. Changing this to a single Division Managed List would then disassociate the Managed List from all the Form Templates in all other Divisions except for the selected single Division. All the Form Templates associated with the Managed List in all the other Divisions would then be rendered ineffective.<br>The Division is a Drop down list field listing all the available Divisions and the 'All' option. The 'All' option or the required Division is selected when creating a new Managed List.<br>When viewing an existing Managed List the Division field appears as a disabled non-editable field displaying either a Division name or the 'All' option.<br>The Division field is also used for filtering the Managed List Summary table. |
| Code | The Code is a unique code assigned to the Managed List by its creator. The principles applicable for creating a code in other areas of InformationLeader as explained in detail in the Forms Builder module are also applicable to the Managed List Code. When viewing an existing Managed List the Code field appears as a disabled non-editable field displaying Code for the selected Managed List. The Code and the Name are displayed in the Managed List property in the Form Builder.<br>The Managed List Code is also used for filtering the Managed List Summary table.<br>**A maximum of twenty characters are permitted in the Code field in Managed Lists.** |
| Name | Each Managed List is also given a more descriptive name for easier identification. The principles applicable for creating a name in other areas of InformationLeader as explained in detail in the Forms Builder module are also applicable to the Managed List Name. When viewing an existing Managed List the Name field appears as an enabled editable field displaying Name assigned to the selected Managed List. The Code and the Name are displayed in the Managed List property in the Form Builder.<br>The Managed List Name is also used for filtering the Managed List Summary table.<br>**A maximum of fifty characters are permitted in the Name field in Managed Lists.** |
| List Type | The List Type field incorporates a Drop down list with the options:<br>▸ Alphanumeric; and<br>▸ Numeric<br>These options are only available when a new Managed List is created. When viewing an existing Managed List the List Type field appears as a disabled non-editable field displaying the List Type for the selected Managed List. An assigned List Type cannot be changed after the |

| Fields / Buttons | Description |
|---|---|
| | Managed List has been created. |
| Reports | The Reports field lists the Standard InformationLeader Reports that are currently available for reporting on Managed Lists. Selecting a Report from the Drop down generates a report. |
| Description | The Description field describes the Managed List and its contents. This field can be edited at any time. |
| Input File Path and Name | This field is available only in the Managed List Import / Export interface. The interface can be accessed by placing a tick in the 'Import/Export' Check Box. This field is used only for importing Managed Lists. It is used to enter the name of the Zip file containing the Managed List and the path (location address of the file) to that file. |
| Item Code Required | The Item Code Required Check Box is ticked by default. In the ticked state all the List Items must be assigned a Code. This Check Box can be un-ticked when creating a new alphanumeric Managed List that does not require Codes to be assigned for List Items. Codes are mandatory for all:<br>▸ Managed Lists (Managed List Codes);<br>▸ List Items of numeric Manage Lists (List Item Codes);<br>▸ Existing alphanumeric Managed Lists that have codes assigned to List Items; and<br>▸ All Item Details (Item Detail Codes). |
| Show Historical | The Show Historical Check Box provides the option to view all the Managed Lists that have been created including the Historical versions of current Managed Lists as well as deleted Managed Lists. In Historical view the last column of each row of the Summary table displays either a C, H, or a D respectively representing Current, Historical (older versions) and Deleted Managed Lists. The list in the Managed List Summary table can be toggled to display either the Current or Historical view by respectively placing a tick or un-ticking the Show Historical Check Box. |
| Import/Export | The Import/Export Check Box is un-ticked by default. Placing a tick in this Check Box displays the Managed List Export / Import interface. As the name suggests this interface is used for either exporting or importing Managed Lists. Exporting and Importing Managed Lists is explained in further detail in section 8.8. |
| Refresh | Clicking the Refresh button refreshes the Managed Lists Summary table based on the filtering selection as explained in section 8.2. |
| New | Clicking the New button deselects the Managed List selected in the Summary table and clears the fields displaying the details of that Managed List. |
| Delete | The Delete button is used to delete the selected Managed List from the Current view of the Summary Table. The Managed List will continue to be available in the Historical View and to all Form Instances that are created up to the point when the Managed List is deleted. Thereafter the Managed List will not be available for creating any new Form Instances. The Managed List Item associating the Managed List to the Form Template will display an error message. |

| Fields / Buttons | Description |
|---|---|
| Save | Clicking the button Saves a new or an edited Managed List. Any changed or editions made to a Managed List must be made before navigating away from the current Managed List tab. |
| Import | Clicking this button imports the Managed List in the Zip file mentioned in the 'Input File Path and Name' field. |
| Export | The Export button is enabled only once a Managed List is selected in the Summary table. Clicking the Export button exports the Managed List in a Zipped file (exported Managed List Files can be identified by the *.tml file extension). |
| Lists Tab | The List Item Tab displays the Managed List Summary table listing all the Managed Lists as per the selected view (Current / Historical). |
| List Items Tab | The List Items Tab displays the Items listed in a Managed List. The tab is enabled only when a Managed List Item is selected in the Summary table. |
| Item Details Tab | The Item Details Tab displays the details for each of the items listed in the List Items Tab. The Item Details Tab is enabled only when a List Item is selected in the List Items Tab. |

**Table 8 –** Managed List page Fields, Buttons and Tabs

## 8.2 Filtering Managed Lists

The Managed Lists displayed in the Summary table can be filtered based on:

- Assigned Division;
- Managed List Code;
- Managed List Name; or
- A combination of any two or more of the above.

Entering the filtering criteria in the Division, Code and Name fields and then clicking the Refresh button accordingly refreshes the Managed Lists Summary table.

1. **All fields need not be completed for a filtered search. Filtration is possible through one or more selected/entered fields.**
2. **Entering part of a Code or Name in the respective field(s) displays all Managed Lists beginning with the letters/numbers entered.**

## 8.3 Creating a New Managed List

The use of Managed Lists has been previously explained in the Forms and the Form Builder modules. One of the Managed Lists used in a previous scenario has been the PL – Product List Managed List. Creating a new Managed List is being demonstrated through the scenario of creating the PL – Product List Managed List. A new Managed List is created with the List tab as the active tab:

Administration Module > Managed Lists > Managed Lists Maintenance Page > Lists Tab

1. Division = ALL – to select 'All' option as the Managed List is to be made available across all Divisions.
2. Code =PL – enter a unique Code 'PL' representing Product List for the 'Product List Managed List'.
3. Name = Product List – enter a meaningful descriptive name for the Product List.
4. List Type = Alphanumeric – as the Managed List is an Alphanumeric Managed List. The List Item Codes are not to be used for any calculations hence there is no requirement for the Managed List to be a Numeric list.
5. Description = "List of Products with product details" – enter a brief description of the Managed List.
6. Save – to create and save the new Managed List

The steps mentioned above have created the new PL- Product List Managed List however at this stage no products or their details have yet been added in the Managed List. Managed Lists have List Items and each List Item may or may not have Item Details. The following two sections describe how the products and their details are respectively added to the List Items and Item Details.

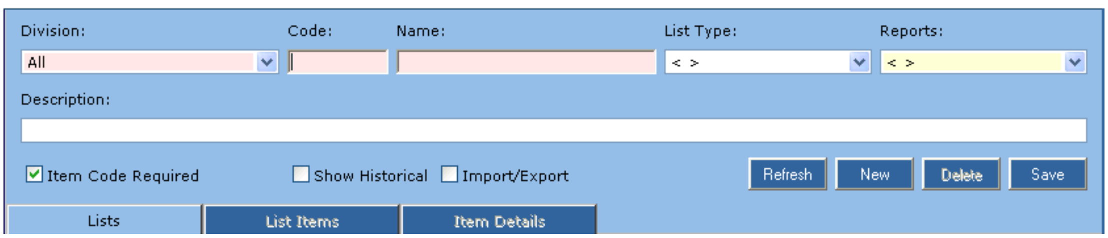



**Figure 16 –** Creating a new Managed List

## 8.4 Adding List Items

The List Items which are the different products in this scenario are added in the List Item tab. This tab is enabled only when a Managed List is selected in the Summary table in the Lists Tab. For an existing Managed List the List Item Tab displays a Summary table displaying the List Items.

The List Item Tab incorporates four special fields (see Figure 17) used for creating a New List Item. If a List Item is selected in the Summary table of this tab, these fields display the details that have been entered for the respective List Item. The List Item tab fields are described in Figure 17 and in Table 9.

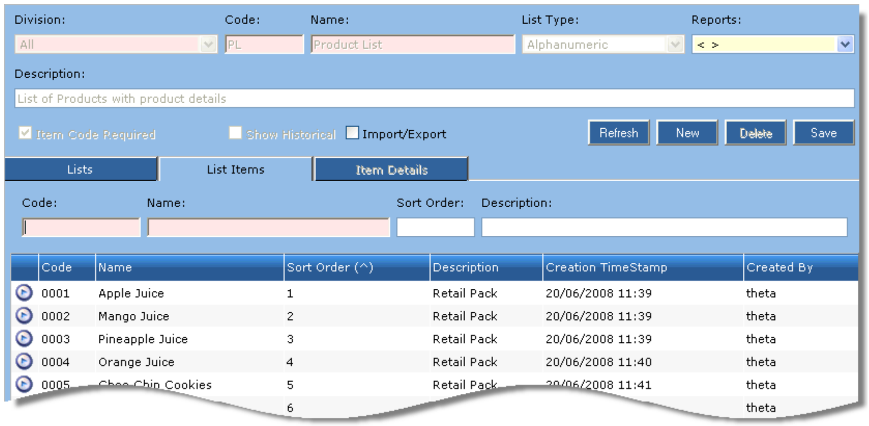



**Figure 17 –** List Item tab in Managed Lists Functional area

| Fields | Description |
|---|---|
| Code | The Code is a unique code assigned to each List Item within a Managed List. Though Codes are unique within a specific Managed List the same Code can be used in different Managed Lists. The principles applicable for creating a code in other areas of InformationLeader as explained in detail in the Forms Builder module are also applicable to the List Item Code in a Managed List.<br>The List Item Code is displayed in the Display As property of the Managed List Item in the Form Builder and is also used for Referencing in the Reference Link Pop-up in the Forms Builder modules.<br>**The Codes used in List Items and Item Details must be unique Codes. Codes within a Managed List cannot be repeated, i.e. a Code used for a List Item cannot be used as a Code for Item Details and vice-versa.** |
| Name | Each List Item in a Managed List is also given a more descriptive name for easier identification. The principles applicable for creating a name in other areas of InformationLeader as explained in detail in the Forms Builder module are also applicable here. The List Item Name is displayed in the Display As property of the Managed List Item in the Form Builder and is also used for Referencing in the Reference Link Pop-up in the Forms Builder modules. A maximum 0f 100 characters can be entered in the Name field.<br>**All, New or < > are not permitted to be used as names in this field. A 'Failed Validation' message is displayed when these are used as names in the Name field.** |
| Sort Order | The Sort Order field is used to assign a numeric value to determine the order in which the List Items are displayed in the Summary table of the List Item tab and in the Sort List By Managed List Item property in the Forms Builder. |
| Description | The Description field is used for giving a brief description of the List Item. |

**Table 9 –** Description of List Item Fields in Managed Lists Functional area

The PL-Product List Scenario is being continued here to demonstrate adding List Items:

Administration Module > Managed Lists > Managed Lists Maintenance Page > Lists Items Tab

1. Code = 0001 – to enter the Product Code as the unique List Item code.
2. Name = Apple Juice – to enter the Product Name as the List Item Name.
3. Sort Order = 1 – to enter the place of the Apple Juice List Item in the List Item Summary order, i.e. the first item in the list.
4. Description = Retail Pack – to enter a brief description of the product (List Item).
5. Save – to save the Apple Juice List Item.
6. Repeat steps 1 to 5 for each new List Item to be created.

**Each List Item must be individually saved before creating a new List Item or after it has been edited. Failing to do so will not create the new List Item or the changes made during edition will not be recorded.**

## 8.5 Adding Item Details

The List Items is a list of items represented as Codes and Names with a brief description in a Managed List. Hence as explained earlier in the Product List scenario the List Items are the Product Codes and the Product Name. The List Item does not give any additional details about the product such as its size, packaging type, price, etc. Managed Lists provide a second level – Item Details to facilitate including such details. The Item Details are created and maintained in the Item Details tab. Selecting a List Item in the List Item Summary table enables the Item Details tab.

The fields and buttons to facilitate the creation and editing of Item Details in the Item Details tab is explained in Figure 18 and Table 10

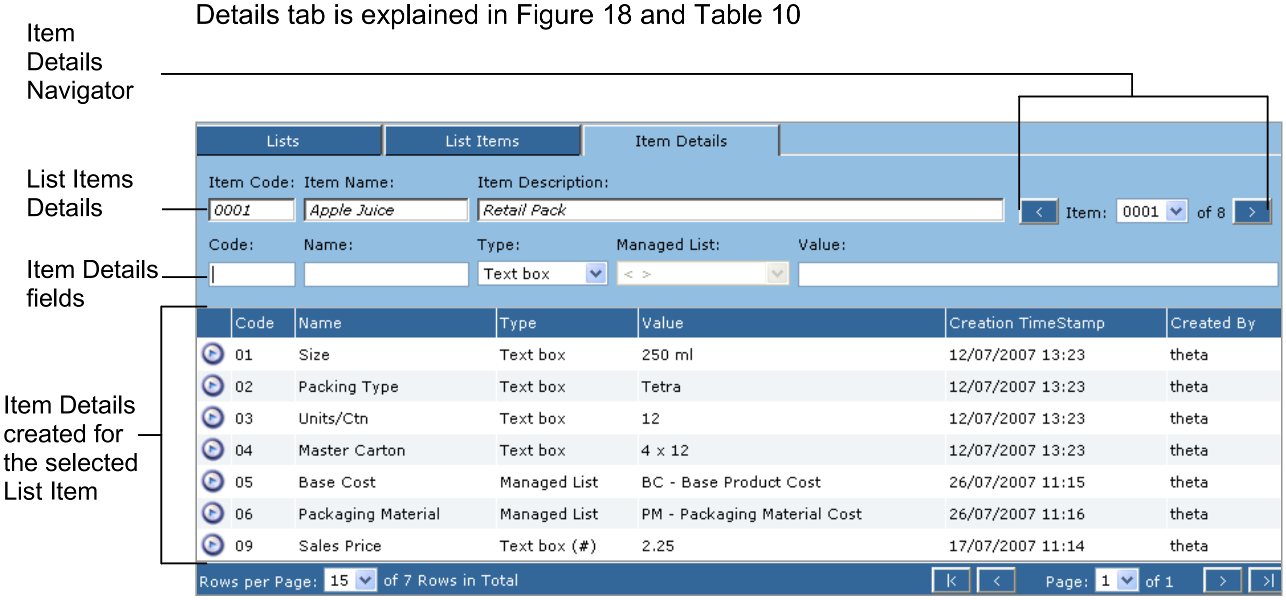



**Figure 18 –** Item Details tab in Managed Lists Functional area

| Fields / Buttons | Description |
|---|---|
| Item Code | Item Code is a disabled non-editable field displaying the Item |

| Fields / Buttons | Description |
|---|---|
| | Code for the selected List Item and described in detail in Table 9. |
| Item Name | Item Name is a disabled non-editable field displaying the Item Name for the selected List Item and described in detail in Table 9. |
| Item Description | Item Description is a disabled non-editable field displaying the Item Description for the selected List Item and described in detail in Table 9. |
| Code | The Code is a unique code assigned to each Item Detail within a List Item. Though Codes are unique within a specific List Item the same Codes are automatically repeated in all List Items within the Managed List.<br>The principles applicable for creating a code in other areas of InformationLeader as explained in detail in the Forms Builder module are also applicable to the List Item Code in a Managed List.<br>**The Codes used in List Items and Item Details must be unique Codes. Codes within a Managed List cannot be repeated, i.e. a Code used for a List Item cannot be used as a Code for Item Details and vice-versa.** |
| Name | The Name is a name assigned to each Item Detail within a List Item. The same Names are automatically repeated against the respective Code in all List Items within the Managed List.<br>The principles applicable for creating a name in other areas of InformationLeader as explained in detail in the Forms Builder module are also applicable here. |
| Type | The Type Drop down facilitates selecting a Data Item Type that will be associated with the Item Detail. This determines the type of value to be entered in the Value field. The allowable types that can be associated are:<br>▸ Check Box;<br>▸ Date Picker;<br>▸ Time Picker;<br>▸ Text Box;<br>▸ Text Box (#);<br>▸ Managed List;<br>▸ Managed List (#); and<br>▸ Multiselect (Managed List).<br>The item selected from the Type Drop down determines the type of value that can be entered in the Value field. |
| Managed List | The Managed List Drop down is enabled only if one of the following three items are selected in the Type field:<br>▸ Managed List; |

| Fields / Buttons | Description |
|---|---|
| | ▸ Managed List (#); and<br>▸ Multiselect (Managed List).<br>The Drop down in this field lists all the Managed Lists based on the Division selection, i.e.:<br>▸ If the Managed List that is being created or edited belongs to ALL Divisions then all Managed Lists are listed in the Drop down; Or<br>▸ Only Managed Lists belonging to the specified Division or that belong to all the Divisions are listed in the Drop down list.<br>Selecting a Managed List displays the Managed List's List Items in the Value field. |
| Value | The Value field is used for entering a value for the Item Detail. The value field type represents the selection made in the Type field. The correlation between the selected type and the Value type is given below:<br>**Type** — **Value Field**<br>Check Box — Check Box<br>Date Picker — Date Picker<br>Time Picker — Time Picker<br>Text Box — Text Box<br>Text Box (#) — Text Box<br>Managed List — Drop Down List<br>Managed List (#) — Drop Down List<br>Multiselect — Multiselect<br>The value entered or selected in the Value field represents the Item Detail value for the List Item selected in the List Item Summary. |
| < Item: 0001 of 8 > | The Item Details Navigator is similar to the Records Navigator in the Edit mode of an Expanding Table and has been explained in detail in the Forms module. |

**Table 10 –** Description of Item Details tab in Managed Lists Functional area

The scenario of the PL-Product List is continued to demonstrate the creation of Item Details:

Administration Module > Managed Lists > Managed Lists Maintenance Page > Items Details Tab

1. Code = 01 – Code given to the first Item Detail – Size.
2. Name = Size – Name given to the first Item Detail bearing the Code – 01.
3. Type = Text Box – to define the type of value to be entered in the Value field as Text.

4. Value = 250 ml – to enter text that will be displayed for the Item Detail for the selected List Item.
5. Save the Size Item Detail by:
   a. Save – to save the Size Item Detail
   OR
   b. – in the Item Details Navigator
6. Similarly repeat steps 1 to 5 to create ‘Packaging Type’, ‘Units/Ctn’ and ‘Master Carton’ Item Details.
7. Repeat steps 1 and 2 to create ‘Base Cost’ Item Detail
8. Type = Managed List – to define the value to be entered from an associated Managed List in the Value field.
9. Managed List = COST – ALL – to select the associated Managed List to be used for populating the Value field.
10. Value = BC – Base Product Cost – to select ‘BC – Base Product Cost’ as the List Item in the COST Managed List whose Item Details will be used to populate the current List Item in the PL-Product List managed List.
11. Repeat step 5 to save the Item Detail.
12. Similarly repeat steps 7 to 11 to crate the Packaging Material Item Detail.
13. Repeat Steps 1 and 2 to create ‘Sale Price’ Item Detail.
14. Type = Text Box (#) – to define the type of value to be entered in the Value field as Text.
15. Value = 2.25 – to enter numeric value that will be displayed for the Item Detail for the selected List Item.
16. Repeat step 5 to save the Item Detail

**Each Item Detail must be individually saved before creating a new Item Detail or after it has been edited. Failing to do so will not create the new List Item or the changes made during edition will not be recorded.**

## 8.6 Editing Managed Lists

Managed Lists can be easily edited by navigating to the List Item or Item Detail to be edited. Ensure that each List Item or Item Detail is individually saved after each edition otherwise the changes will not be recorded in the Managed List. Form Instances created after the changes have been saved only have access to the edited version of the Managed List.

**Managed Lists associated with Reference Data Forms should not be edited as this can adversely affect the data in the forms.**

## 8.7 Deleting Managed Lists

Managed Lists can be deleted by selecting the Managed List in the Summary table and clicking the Delete button. Once deleted the Managed List is removed from the Current view and is not available to the System. It however continues to be displayed in the Historical view of the Summary Table.

It should be remembered that once deleted the Managed List will not be available to any of the Form Templates it is associated with. However all Form Instances created prior to the deletion of the Managed List will continue to be associated with the deleted Managed List and will display the information as prior to the deletion of the Managed List.

**Reference Data Forms associated with a deleted Managed List are not associated any longer with the deleted Managed List and will display blank fields. A tool-tip explains the reason for the Managed List field being blank, i.e. the Managed List is deleted.**

## 8.8 Exporting and Importing Managed Lists

The Export and Import of a Managed List is conducted in the Export interface of the Managed List Maintenance page.

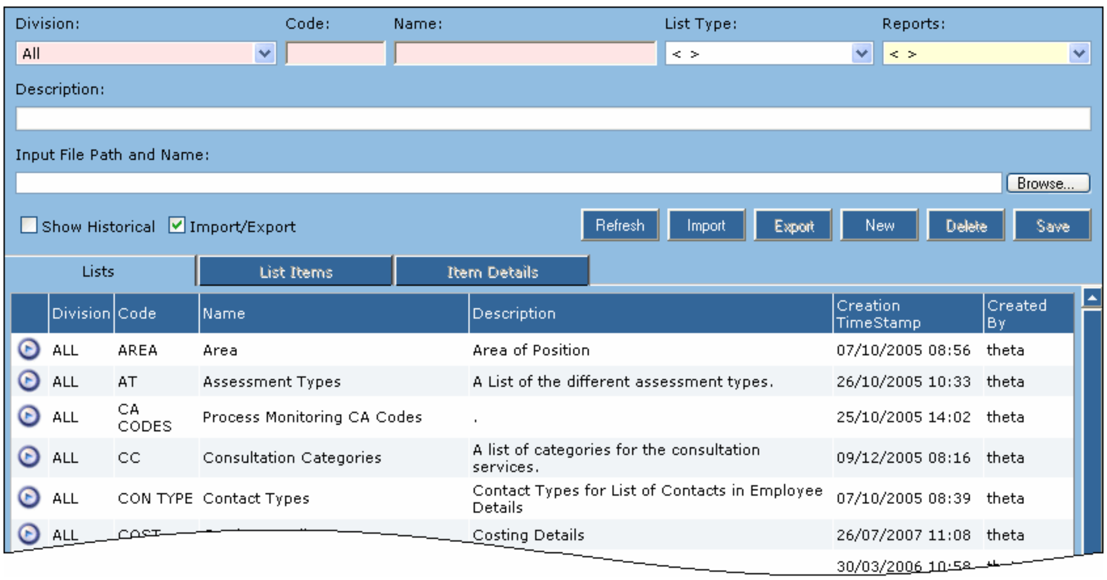



**Figure 19 –** Managed List Import/Export interface

The Import/Export interface of the Managed List is similar to the default Managed List page with the Lists tab active. However the interface includes additional fields and buttons which are not available in the default Managed List page:

- Input File Path and Name Field;
- Import button; and
- Export button.

These field and buttons are illustrated in Figure 19 and have been further described in Table 8.

### 8.8.1 Exporting Managed Lists

Managed Lists can be exported as part of a Form Template process (refer to exporting Form Templates in the Forms Builder module) or directly as Managed Lists. To export a Managed List:

Administration Module > Managed Lists > Managed Lists Maintenance Page > Lists Tab

1. Import/Export – to tick Check Box to view Import/Export interface.
2. – to select Managed List to be exported.
3. Export – to export Managed List as a *.tml file in a Zip folder
4. Save – to save the exported Managed List locally.

**If a Managed List Item Detail is associated with another Managed List then the associated Managed List must also be exported.**

### 8.8.2 Importing Managed Lists

Managed Lists are imported for a number of reasons:

- They may be associated with a Form template to be imported;
- They may be associated to another Managed List to be imported;
- To facilitate creating a Managed List in one InformationLeader domain and then importing it in another domain, e.g. a Managed List created in the Test Domain can be exported from there and imported into the Production Domain.

In the event the Managed Lists are associated to a Form Template or another Managed List then such Managed Lists should be imported before the Form Template or the Managed List to which it is associated is imported.

**The user must have the necessary permissions for the Administration module and Managed Lists to import and manage Managed Lists.**

Administration Module > Managed Lists > Managed Lists Maintenance Page > Lists Tab

1. Import/Export – to tick Check Box to view Import/Export interface.
2. Select the Zip file containing the Managed List by either:
   a. Browse... – to locate and select the Zip folder containing the Managed List to be imported.

   OR

   b. Enter the address to the location of the Zip file in the 'Input File Path and Name' address bar.
3. Import – to import the Managed List

**It is not necessary to extract the Managed List File from the Zip file to import it in InformationLeader. InformationLeader imports the Zip file. Ensure that the Zip file is selected when importing the Managed List.**

1. – to select the Managed List file in Summary table (required only when importing multiple Managed Lists – usually associated with imported Form Templates)
2. Division – to select Division (only if required).
3. Code – to enter the Managed List Code (only if required).
4. Name – to enter the Managed List Name (only if required).
5. Description – to enter the Managed List description (only if required).
6. Save – to save the Managed List

**When importing a Managed List the Managed List is imported with its assigned Division, Code, Name and Description. It may be necessary at times to change these as an existing Managed List may have identical Code and Name, or the Division assignment may need to be changed. In such instance ensure that Division, Code, Name and Description are appropriately assigned prior to saving the imported Managed List.**

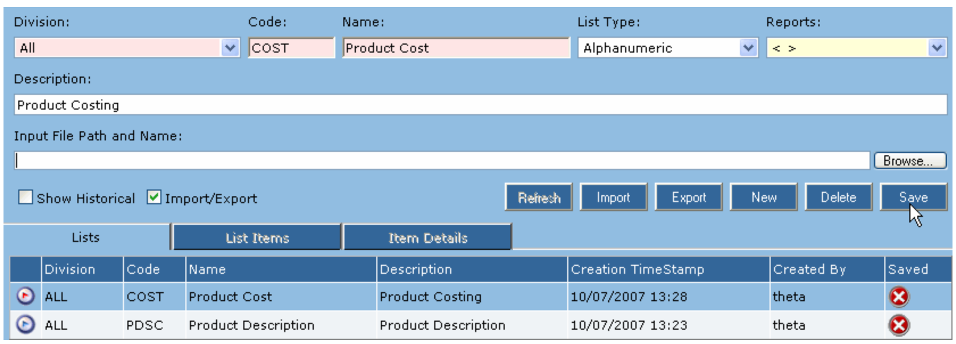



**Figure 20 –** Example of multiple imported Managed Lists

When multiple Managed Lists are contained within the same Zip folder all the Managed Lists are imported together and are listed in the Summary table. A alongside a Managed List in the Summary table indicates that the imported Managed List is not saved. When importing multiple Managed Lists each Managed List must be individually selected and saved as explained in steps 4 to 9 above. As each imported Managed List is saved the against the Managed List is replaced by a indicating that the Managed List has been saved and is available to the system.

If an imported Managed List is not saved prior to navigating out of the Import/Export interface, the Managed List is discarded and if it is required it will have to be imported again.

**Once a Managed List is saved in the Import/Export interface it cannot be then further edited and saved in that mode. Any changes to the Managed List can only be made in the normal view as explained in section 8.6.**

# 9 User Job Categories

User Job Categories are used for categorising Scheduled Jobs which are broadly categorised into three categories

- User Jobs;

- Report Jobs; and
- System Jobs.

User Jobs and Reports Jobs have been explained in the Job Scheduler section of the Requests module. System Jobs are predefined Jobs used by the System.

InformationLeader provides the flexibility of creating User Jobs to meet the varying requirements of a Company. Additional User Jobs can be created in the User Job Categories Functional area. Though InformationLeader provides the flexibility of creating additional User Jobs it is a good practice to first ensure that existing Job Categories cannot be used for categorising a job.

User Job Categories are created and managed in the User Job Categories Functional area.

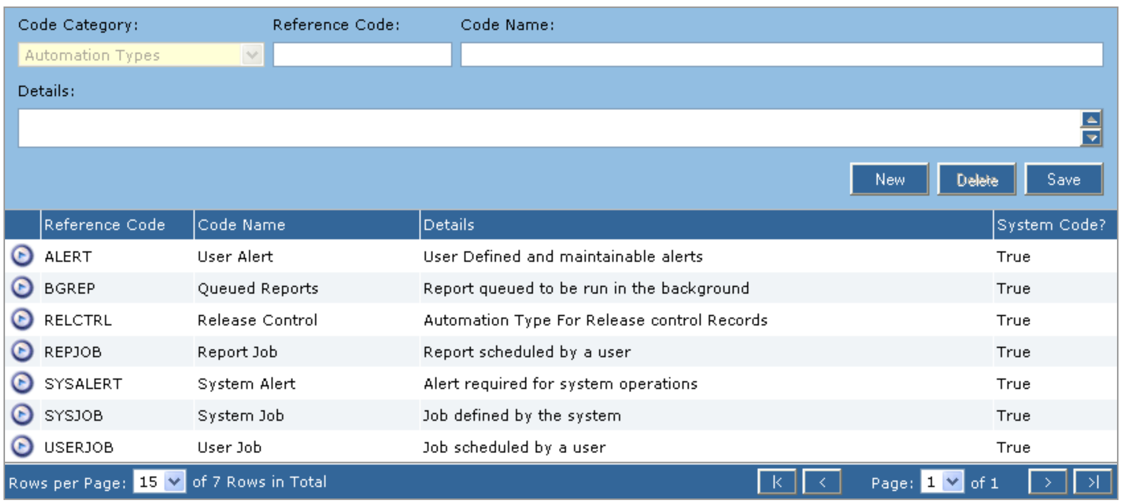



**Figure 21 –** User Job Categories page

| Fields / Buttons | Description |
|---|---|
| Code Category | This is a disabled non-editable field displaying a System recognised Code Category. |
| Reference Code | This field is used for entering a Reference code for the User Job Category and follows the conventions used for assigning codes in InformationLeader. These have been previously explained in the form Builder module. |
| Code Name | This is the name of the Job Category and is a more descriptive than the code. |
| Details | This gives the details of the User Job Category. |
| New | This is used to clear the fields for creating a new Job Category. |
| Delete | Selecting a User created Job Category in the Summary table enables the Delete button. Clicking the button deletes the Job Category. |
| Save | Saves a new User created Job Category. |

**Table 11 –** User Job Category fields and buttons

To create a new Job Category;

Administration > User Job Category > Reference Codes Page

1. Reference Code – enter a reference code for the new Job Category.
2. Code Name – enter a name for the Job Category.
3. Details – enter details describing the Job Category.
4. Save – to save the Job Category

# 10 Job Scheduler

The Job Scheduler facilitates scheduling jobs which are automatically run on the scheduled date and time. This means that when a job is run the Role or User it is assigned to, receives a Request notification as a reminder to act on or to complete a task.

The Job Scheduler Functional area is available in the Request module and the Administration module. It is a good business practice to limit the use of the Job Scheduler in the Administration module for System and Administrator Jobs.

System Jobs are jobs created by the system such as the automated reminders on the expiry of the Follow-up period in Requests. An Administrator defined job on the other hand are User jobs created by the Administrator in the Administration module for those jobs that occur at a global level within the company, such as for the periodic maintenance of the system.

Users schedule jobs can be created in the Requests module Job Scheduler and has been explained in detail in the Request module. However jobs created in the Job Scheduler in the Request module are also visible in the Summary table of the Job Scheduler in the Administration module.

The Job Scheduler has been explained in detail in the Requests module along with explanations for:

- Queued Reports;
- Report Job; and
- User Job.

System Jobs are scheduled through the Job Scheduler in the Administration module through an interface that is identical to the interface for the User Job in the Job Scheduler. This interface and the steps to create a Job using this interface have been explained in detail in the Job Scheduler section of the Request module and are not being repeated here. However there are certain differences between the two which are being elaborated below.

### Disabled End Date Field

As System Jobs do not have an end date, the End Date field is disabled and is non-editable for System Jobs.

### Special Rules for Emailing Report Jobs

There are certain rules that apply to sending Report Jobs as email attachments. These rules have been explained in the Request module section on Job Scheduler – Report Jobs in context of the Request module. However a different set of rules apply if the Report Job is created from the Administrative module. The rules that apply when configuring the email for report Jobs in the Administration module are mentioned below:

- When User is selected:
  - The ‘Email To’ drop down lists all users from all Divisions.
  - The selected user will receive the report as an email attachment.
- When Role is selected:
  - The ‘Email To’ drop down lists all Roles from all Divisions.
  - If a division is specified in the Search Filter then the email report will only be sent to Users in the selected Role within the specified Division.
  - If ‘All’ is selected for Divisions in the Search Filter then the email report will be sent to all Users in the selected Role in all Divisions.

# 11 Remotes

The Remotes Functional area of the Administration module is used exclusively by sites that have been configured for and have implemented the Remote Synchronisation of InformationLeader. For further information on this Functional area please refer to the Remotes module.