



SmartCollaboration Admin Panel for



Version 4.5
Part Number E62377-01

Table of Contents

1 Introduction.....	3
1.1 Document Overview.....	3
1.2 Basic Terms and Concepts.....	3
2 Functionality Overview.....	4
3 SmartCollaboration Admin Panel Components.....	4
3.1 User Groups.....	4
3.1.1 Editing User Group Details.....	6
3.2 User Permissions.....	8
3.3 Helpdesk Groups.....	10
3.3.1 Editing Helpdesk Group Details.....	11
3.4 Helpdesks.....	12
4 Permissions Scenario.....	15

This document contains proprietary and confidential information of TOA Technologies and shall not be reproduced or transferred to other documents, disclosed to others, or used for any other purpose other than that for which it is furnished, without the prior written consent of TOA Technologies. It shall be returned to TOA Technologies upon request. The trademark and logo of TOA Technologies are the exclusive property of TOA Technologies, and may not be used without permission. All other marks mentioned in this material are the property of their respective owners.

1 Introduction

1.1 Document Overview

This document is intended for ETAdirect users who work with SmartCollaboration Administration panel, to provide understanding of its functionality settings. The document also provides the description of the Administration panel components as well as step-by-step instructions supported by screenshots. It is assumed that the reader is familiar with the basics of ETAdirect functionality.

1.2 Basic Terms and Concepts

Below is the list of terms and concepts that may be mentioned in the document and will provide a better understanding of the functionality. Please note: The reader, hereinafter, may be addressed as "you".

Term	Description
Chat	Conversation between you and other SmartCollaboration User
Chat participant	You or any other SmartCollaboration User engaged in a Chat (either initiating or joining it)
Company	1) Legal entity, using ETAdirect 2) Entity that represents a Client in ETAdirect system; company is created by TOA Technologies during the process of implementation
Field	Property present in the system by default
GUI	Graphical User Interface, allowing people to use software by manipulating images rather than by issuing text commands
Inventory	Equipment that can be installed or deinstalled during an activity
Helpdesk	Collection of chats created by different users where users can address their questions to qualified personnel and get answers in realtime
Helpdesk operator	Qualified person who can process questions in the Helpdesk; Helpdesk operator can see conversations of other operators with users, transfer conversations to other operators or helpdesks, see helpdesk statistics
Message	A single piece of communication sent to Chat by a User or verbalization of the User's actions (sent message, shared information, joining and leaving the chat, etc.)
Technician (Resource)	Person who performs work at the customer's premises (the one who provides the service)
Resource	Element in the resource tree representing a defined company asset
Administrator	Administrator is a selected user who can use SmartCollaboration Admin panel to set up permissions for the rest of the users and for the helpdesks/helpdesk groups of their own company
User	Any ETAdirect user for which the SmartCollaboration functionality is enabled

2 Functionality Overview

The SmartCollaboration Administration panel is intended to be used by the company personnel who are authorized to manage SmartCollaboration functionality settings. The tools included in the panel allow to administer users and helpdesks, allocate users to various groups, and control permissions for the users who access SmartCollaboration.

3 SmartCollaboration Admin Panel Components

The SmartCollaboration administration tools are generally grouped into four sections:

- User Groups
- User Permissions
- Helpdesk Groups
- Helpdesks

They can be accessed from the 'SmartCollaboration' action link on the Main menu panel of the Manage Application (Figure 1).

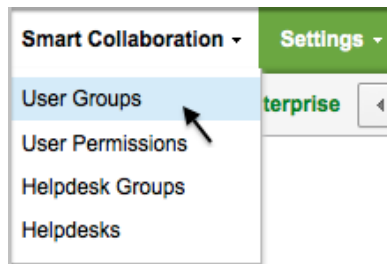


Figure 1: 'SmartCollaboration' drop-down

Note: Given configuration of context layout is for demonstration purposes only. This is not a default setting, and it may vary depending on different display profiles.

This document provides detailed information on each of the four sections.

3.1 User Groups

The 'User groups' section serves a purpose of creating roles, structure, and assigning permissions. All major changes and edits take place in this section of SmartCollaboration.

'User groups' appears in the drop-down list, after clicking on 'SmartCollaboration'.

Once redirected to the 'User Groups' area, groups that fall under the permission to administrate appear. The list of groups reflects name and membership information, group description and status (Figure 2).

User group list

Show inactive

5 records

Name	Main group	Subgroups and members	Description	Active
sc.sunrise.demo users			All users and user groups of company 'sc.sunrise.demo' automatically belong to this group	active
Administrators	Admin		Company administrators	active
Helpdesk_users		Anna and 2 more...		active
General issues operators		German Engineer and 1 more...		active
Technical issues operators		European Engineer and 1 more...		active

Figure 2: User group list

The 'User group list' contains the following user group details (Figure 3):

Name ▾	Main group	Subgroups and members	Description	Active
--------	------------	-----------------------	-------------	--------

Figure 3: 'User group list' header

- 'Name' – This field reflects the name of the group. Groups can be sorted by name. In order to do that, just click on 'Name'
- 'Main group' – Provides information about the group that the permissions have been inherited from
- 'Subgroups and members' – This section lists the subgroups and members of the group
- 'Description' – Short summary of the group
- 'Active' – This field indicates the status of the group ('active' or 'inactive')

Note: By default, only 'active' user groups are shown in the list. In order to see both 'active' and 'inactive' user groups, click on the 'Show inactive' checkbox next to the search field on the top of the screen.

To add a new group, click the 'Add new group' button, which is located in the top left corner of the page. If you need to locate a particular group, use the search field at the top right (Figure 4).



Figure 4: 'Add new group' button and group search field

Enter your search criteria, and click 'Search' to get the results. The user group list will now show only the items matching the search criteria (name or description) entered. If you wish to go back to the whole list

of available user groups, you need to clear the search field entry and click 'Search' again.

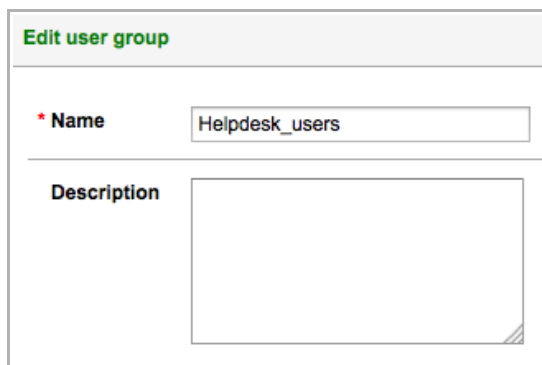
Clicking on a particular group in the list will redirect you to a page with the details, where information gets updated and permissions get granted, etc.

3.1.1 Editing User Group Details

As mentioned earlier, in order to see the details of a particular group, you need to click on it to view and/or edit permissions, members, descriptions, etc. Following, is the description of each section in the 'Edit user group' form.

- **Name and Description:**

To edit a group's description and name you simply need to enter the information in the necessary fields (Figure 5).



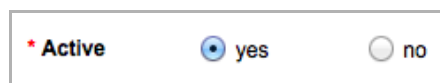
The screenshot shows a form titled "Edit user group". It has two main sections: "Name" and "Description". The "Name" section has a text input field containing "Helpdesk_users" and is marked with a red asterisk. The "Description" section has a large, empty text area.

Figure 5: Name and Description of 'Edit user group' screen

The name of the group does not have a default format. It can be written in any language, with any printable symbols, and it does not need to be unique (e.g. The group names can coincide).

- **Active:**

Select Yes or No to either activate or deactivate the group (Figure 6).




The screenshot shows a form element for "Active" status. It has a red asterisk and two radio buttons: "yes" (which is selected) and "no".

Figure 6: Selecting User group status

Note: The fields marked with an asterisk are mandatory (e.g. 'Name' and 'Active').

- **Main Group:**

This field allows to edit the parent group information. The main group is selected from the drop-down menu (Figure 7).



The screenshot shows the "Main group" section of the form. It has a dropdown menu with "Administrators" selected and a "Change" button. Below it is a table with the following data:

	Name	
indirect	sc.sunrise.demo users	
new	Administrators	x

Figure 7: Updating information on the Main group

By being admitted to a particular parent group, participants are granted permissions of this group accordingly. In order to set the selected group as a main group, click Change, right next to the drop-down selection.

By design, the main group section always has a default main group – the 'company_name users' group. It automatically includes all users and user groups of the company (e.g. the 'sc.sunrise.demo users' group in Figure 7). This group cannot be deleted, as opposed to the main group selected from the drop-down list.

- **Subgroups and Members:**

This section of the 'User Groups' displays all subgroups and members that will inherit the permissions of the given user group along with the ones that can be added.

You can search for and add users and/or subgroups here (Figure 8). It is enough to start entering a name for matched results to show up. Make your choice by clicking on the desired name, and click 'Add' for the name to be added to the member's table.

Note: The users and/or subgroups that are already in the list will not be shown among the search results.

New members that have not yet been saved are marked as 'new' and highlighted in green.

Members and/or subgroups can be deleted from the list by clicking the cross in the last column of the corresponding row. Before being saved, the deleted items are marked as 'delete' and highlighted in red (Figure 8).

Subgroups and members: Can see each other

4 records

All listed members inherit all privileges of the current group

	Name	
	Anna	×
delete	Kathleen Disney	×
	Terri Basile	×
	ARNDT William	×
new	Steve	×

Figure 8: Editing 'Subgroups and Members' list

All listed members acquire inherited permissions from the user group along with the permissions from the 'Permissions' section.

To allow the members of the group to chat with each other, check the Can see each other box. If this group is a member of another group which hosts the checkbox permission, then the checkbox is disabled.

- **Permissions:**

This section defines the permissions to be granted to the User group (Figure 9).

Permissions:

All subgroups and members are privileged to search and chat with listed items

	Name	Add To Address Book	Operator	Administrator	
	General issues support	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	×
	Technical issues support	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	×
inherited	sc.sunrise.demo users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Figure 9: Editing User group permissions

Adding an item (i.e. a user/user group/helpdesk/helpdesk group) to the list will allow all subgroups and members of the current User group to chat with those items. In addition, there are three more types of permissions that can be enabled for the user group. These permissions determine directed links to the listed items. They are as follows:

- 'Add To Address Book' – adds the item to the User group members' contact list; enables the user to search for and chat with the added contact; such contact cannot be removed
- 'Operator' – grants the permission of helpdesk operator
- 'Administrator' – grants the permission of administrator

In order to add an item, start typing its name in the search field right above the list. From the drop-down list of the matched results, choose the desired name and click 'Add' next to the search field.

Items can be deleted from the list by clicking the cross on the right edge of a corresponding row.

3.2 User Permissions

'User Permissions' section provides a list of users that have access to SmartCollaboration (Figure 10).

Name	Member of	Last login (in GMT)
Admin (u:admin@sc.sunrise.demo)	Administrators	today
Dispatcher (u:dispatcher@sc.sunrise.demo)		never
Manager (u:manager@sc.sunrise.demo)		never
CSR (u:CSR@sc.sunrise.demo)		never
Spain Dispatcher (u:sp_dispatcher@sc.sunrise.demo)		never
Spain Engineer (u:sp_engineer@sc.sunrise.demo)		never
Spain CSR (u:sp_csr@sc.sunrise.demo)		never
French CSR (u:fr_csr@sc.sunrise.demo)		never
French Dispatcher (u:fr_dispatcher@sc.sunrise.demo)	Technical issues operators	never

Figure 10: User permissions list

The 'User permissions' list contains the following details (Figure 11):

Name	Member of	Last login (in GMT)
------	-----------	---------------------

Figure 11: 'User permissions' list header

- 'Name' – User's name loaded from ETAdirect; it cannot be edited
- 'Member of' – Reflects the group/s that user belongs to
- 'Last login' – The day of the user's last appearance in ETAdirect

To search for a particular user in the list, type the search key in the search field, located in the top right corner of the screen, and click 'Search' (Figure 12). The filtered list will display all the users with user

names and logins containing the search key.

In case there are longer user lists that do not fit into the screen, you can navigate through such lists by clicking either the page number, or the 'Previous' or 'Next' links taking you to the previous or next page, respectively.

The number of users currently displayed and the total number of records in the list are shown on the right, under the search field.

The screenshot shows the 'User permissions' section. At the top right, there is a search field labeled 'Name or address' with a 'Search' button next to it. Below the search field, there are navigation links: '<< Previous 1 2 3 Next >>'. To the right of these links, it says '1 - 20 of 54 records'. Below this, there is a table with three columns: 'Name', 'Member of', and 'Last login (in GMT)'.

Figure 12: Search field in 'User Permissions' section

Just like with 'User Groups', in order to access more detailed information, you need to click on a particular name to see which groups this user belongs to and what permissions they have (Figure 13).

The screenshot shows the 'User details' section for the user 'Admin (u:admin@sc.sunrise.demo)'. It includes a 'Member of:' section with a search box and an 'Add' button. Below this, there is a table showing the user's group memberships. The 'Permissions' section is also visible, showing a list of groups and their associated permissions.

Name	Member of	Last login (in GMT)
Administrators		

Name	Add To Address Book	Operator	Administrator
General issues operators [2 members]	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Technical issues operators [2 members]	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Helpdesk_users [3 members]	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
General issues support	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Technical issues support	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sunrise support [2 members]	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
inherited sc.sunrise.demo users	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
inherited sc.sunrise.demo channels	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Figure 13: 'User details' in 'User Permissions' section

Note: Permissions are not editable in this area, they are merely for information purposes; however, users can be added to groups according to their roles and responsibilities.

In order to locate the group for the user to be assigned to, start typing the group's name in the search field (Figure 14). Click on the group of your choice from the drop-down list of search results, then click 'Add' for the group to be added.

Figure 14: Locating the group for the user

New groups that have not yet been saved are marked as 'new' and highlighted in green (Figure 15).

Groups can be deleted from the list by clicking the cross in the last column of the corresponding row. Before being saved, the deleted groups are marked as 'delete' and highlighted in red.

	Name	
delete	Helpdesk_users	×
	Administrators	×
new	General issues operators	×

Figure 15: Added and deleted groups highlighted before saving the changes

3.3 Helpdesk Groups

Similar to User Groups, 'Helpdesk Groups' is there to add, edit, activate, or deactivate helpdesk groups. To access the 'Helpdesk Groups', follow the same route as before – click on 'SmartCollaboration' and select 'Helpdesk Groups' from the drop-down menu.

You will be redirected to a page with the existing list of Helpdesk groups, which is editable (Figure 16).

Name	Main group	Subgroups and members	Description	Active
sc.sunrise.demo channels			All helpdesks and helpdesk groups of company 'sc.sunrise.demo' automatically belong to this group	active
Sunrise support		General issues support and 1 more...		active

Figure 16: Helpdesk group list

The 'Helpdesk group list' contains the following details:

- 'Name' – This field reflects the name of the helpdesk group. Groups can be sorted by name, if

applicable. In order to do that, just click on 'Name'

- 'Main group' – Provides information about the group that the permissions have been inherited from
- 'Subgroup and members' – This section lists the subgroups and members of the helpdesk group
- 'Description' – Short summary of the helpdesk group
- 'Active' – This field indicates the status of the group ('active' or 'inactive')

Note: By default, only 'active' helpdesk groups are shown in the list. In order to see both 'active' and 'inactive' helpdesk groups, click on the 'Show inactive' checkbox right next to the search field.

To add a new helpdesk group, click the 'Add new group' button, which is located in the top left corner of the page (Figure 17).

If you need to locate a particular group, use the search field, placed at the top right. Just enter your search criteria, and click 'Search' to get the results.

Helpdesk group list

Add new group

Show inactive

Name or description

Search

Figure 17: 'Add new group' button and helpdesk group search field

3.3.1 Editing Helpdesk Group Details

To view and edit the details of the helpdesk group, click on one of the items from the helpdesk group list. After being redirected to the 'Edit helpdesk group' screen, you can view and/or edit its members, descriptions, etc. (Figure 18).

Edit helpdesk group

* Name

Description

* Active yes no

Subgroups and members:

All listed members inherit all privileges of the current group

2 records

Name	
General issues support	x
Technical issues support	x

Figure 18: 'Edit helpdesk group' screen

Following, is the description of each section in the 'Edit helpdesk group' form.

- **Name and Description:**

To edit a group's description and name you simply need to enter the information in the necessary fields. The name of the helpdesk group does not have a default format. It can be written in any language, with any printable symbols, and it does not need to be unique (e.g. The helpdesk group names can coincide).

- **Active:**

Select Yes or No to either activate or deactivate the helpdesk group.

Note: The fields marked with an asterisk are mandatory (e.g. 'Name' and 'Active').

- **Subgroups and Members:**

This section of the 'Helpdesk Groups' displays the list of all subgroups and members (i.e. helpdesks and helpdesk groups) that will inherit relations of the given helpdesk group (Figure 19).

Subgroups and members:		2 records	
All listed members inherit all privileges of the current group		Name	
	General issues support		x
	Technical issues support		x
new	sc.sunrise.demo channels		x

Figure 19: Editing 'Subgroups and Members' list

You can search for and add helpdesk and/or helpdesk groups here.

It is enough to start entering a name for matching results to show up. Make your choice by clicking on the desired name, and click 'Add' for the name to be added to the member's table.

Note: The members and/or subgroups that are already in the list will not be shown among the search results.

New members that have not yet been saved are marked as 'new' and highlighted in green.

Members and/or subgroups can be deleted from the list by clicking the cross in the last column of the corresponding row. Before being saved, the deleted items are marked as 'delete' and highlighted in red.

3.4 Helpdesks

'Helpdesks' is a part of SmartCollaboration which reflects all existing helpdesks. It is also possible to add a new helpdesk, if needed.

To access the 'Helpdesks', choose this section from the drop-down menu under 'SmartCollaboration'.

Just like with all other sections of SmartCollaboration Admin panel, before going into detailed description of each helpdesk separately, you first get a list of all helpdesks where you can search for a particular one you need (Figure 20).

Helpdesks			
Add new helpdesk		<input type="checkbox"/> Show inactive	<input type="text" value="Name or description"/> <input type="button" value="Search"/>
2 records			
Name	Member of	Description	Active
General issues support	Sunrise support		active
Technical issues support	Sunrise support		active

Figure 20: 'Helpdesks' list

Adding a new helpdesk can be done by clicking on the 'Add new helpdesk' button at the top right of the screen (Figure 21).

In order to find a particular helpdesk, you can either browse through the list or click the 'Search' button in the top right corner of the page.

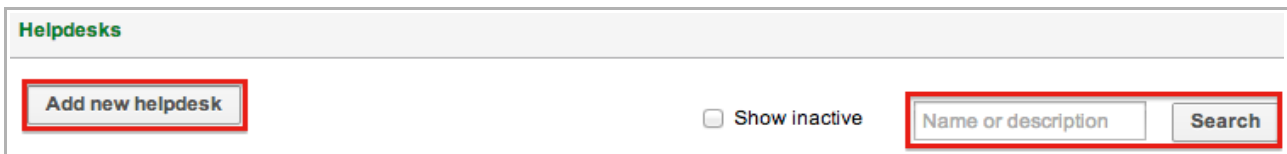


Figure 21: 'Add new helpdesk' button and helpdesk search field

The 'Helpdesks' list contains the following details:

- 'Name' – This field reflects the name of the helpdesk. Helpdesks can be sorted by name, if applicable. In order to do that, just click on 'Name'
- 'Member of' – Reflects the helpdesk group/s that helpdesk belongs to
- 'Description' – Short summary of the helpdesk
- 'Active' – This field indicates the status of the helpdesk ('active' or 'inactive')

Note: By default, only 'active' helpdesks are shown in the list. In order to see both 'active' and 'inactive' helpdesks, click on the 'Show inactive' checkbox right next to the search field.

In order to view or edit the helpdesk details, click on the selected row in the 'Helpdesks' list. You will be redirected to the 'Edit helpdesk' screen (Figure 22).

Edit helpdesk

* **Name**

Description

* **Active** yes no

Member of:

All the privileges are inherited from the groups listed in this section

Name
Sunrise support

Operators and Administrators:

Role	Name	Type
Operator	Technical issues operators	user group
Administrator	Admin	user

Figure 22: 'Edit helpdesk' screen

Following, is the description of each section in the 'Edit helpdesk' form.

- **Name and Description:**

To edit a helpdesk's description and name you simply need to enter the information in the necessary fields.

The name of the helpdesk does not have a default format. It can be written in any language, with any printable symbols, and it does not need to be unique (e.g. The helpdesk names can coincide).

- **Active:**

Select Yes or No to either activate or deactivate the helpdesk.

Note: The fields marked with an asterisk are mandatory (e.g. 'Name' and 'Active').

- **Member of:**

Selected helpdesk can be added to a helpdesk group as a member. This way all the roles of the helpdesk group will be applied to the given helpdesk.

In order to locate the group, start typing the group's name in the search field. Click on the group of your choice from the drop-down list of search results, then click 'Add' for the group to be added (Figure 23).

Member of:

All the privileges are inherited from the groups listed in this section

Name
sc.sunrise.demo channels
Sunrise support

Figure 23: Locating the helpdesk group

New items that have not yet been saved are marked as 'new' and highlighted in green (Figure 24).

Member of:

All the privileges are inherited from the groups listed in this section

	Name
	Sunrise support
new	sc.sunrise.demo channels

Figure 24: New helpdesks highlighted in green before saving the changes

Helpdesk groups can be deleted from the list by clicking the cross in the last column of the corresponding row. Before being saved, such helpdesk groups are marked as 'delete' and highlighted in red.

- **Operators and Administrators:**

This section is not editable and is presented for the information purposes only. It shows users and/or user groups that have permissions to operate and/or administer the given helpdesk. It also indicates the entity type (user or user group) and its name (Figure 25).

Operators and Administrators:	Role	Name	Type
	Operator	Technical issues operators	user group
	Administrator	Admin	user

Figure 25: 'Operators and Administrators' section in 'Edit helpdesk' screen

4 Permissions Scenario

In order to better illustrate how permissions work in SmartCollaboration, we are going to take a look at an organization with two departments in different cities, as an example and look at their visibility and actions permissions in more detail.

We have a company with branches in Orlando and Melburn (Figure 26). Each city has 2 districts and there is a dispatcher assigned to each district. Each dispatcher manages a group of technicians.

The Orlando branch also has a group of contractors, which is controlled by a separate dispatcher. This branch also has a helpdesk: 'Inventory Orlando'.

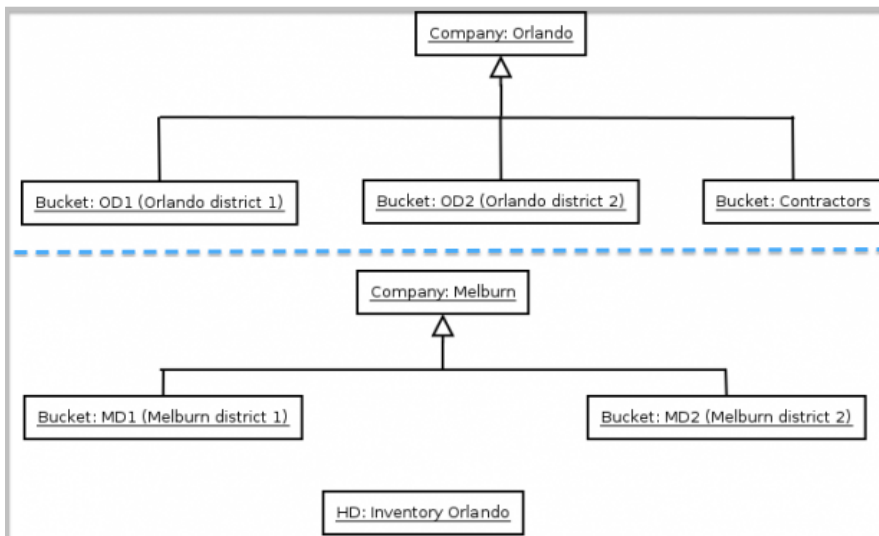


Figure 26: Organizational chart of the company

Each city is represented as a separate company (Figure 27). Each dispatcher represents a bucket. Dispatcher's permissions allow them to view the entire resource tree.

Each technician corresponds to two users, one for each branch. If a technician needs to go on a business trip to a different branch, they will log in under the relevant company, in this case either Orlando or Melburn.

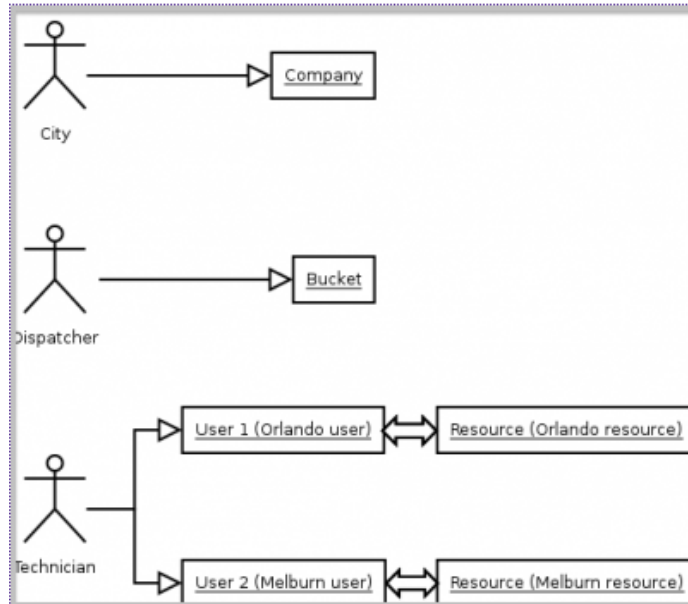


Figure 27: Relations between entities inside the company

Each user is assigned with an appropriate resource.

Gathering users into a group, allows setting permission for the entire group, rather than a separate user. Once a new user is added to an existing group, they are automatically granted the permissions of this group.

In our scenario this is how the groups and roles will interact.

Orlando (User Group 1)

This group includes all employees of the Orlando branch and consists of the 'Inhouse' group, 'Contractors', and the 'Orlando Inventory Helpdesk'.

Contractors:

All members of the 'Contractors' group can communicate with each other and members of the 'Inhouse' group. Members of this group can also be subscribers of the 'Orlando Inventory Helpdesk'.

Members of the 'Contractors' must have a dispatcher in their contact list since this group is controlled by this dispatcher. This means that they cannot remove the dispatcher from the contact list.

Inhouse:

'Inhouse' users can communicate with each other, Melburn employees, and members of the 'Contractors' group. They can also subscribe to the 'Orlando Inventory Helpdesk'.

'Inhouse' technicians are divided into 2 groups by district: OD1 and OD2. Each district gets a dispatcher. Just like with other groups, it is mandatory that the group participants have a dispatcher in their contact list.

Dispatchers:

Orlando dispatchers are combined in a separate group – 'Moderators of Helpdesk'. Participants of this group are operators of the 'Orlando Inventory Helpdesk', which provides them with permissions to view and take all the incoming requests that come into this particular helpdesk. Again, they are also granted permissions to interact with all technicians as members of the 'Inhouse' group.

Helpdesk Administrator:

Administrators can manage the helpdesk, and being a member of the 'Inhouse' group, can address inquiries to the 'Orlando Inventory Helpdesk'.

Melburn (User Group 2)

This group includes all the employees from the Melburn branch. All members of this group can search each other and chat. They can do the same with the employees of Orlando branch.

The technicians are divided into two groups: MD1 and MD2. Each group gets a dispatcher. It is mandatory that each user of these groups keeps their dispatcher on the contact list at all times.

Based on the description of allocated permissions, the following diagram reflects how this will work in the given scenario (Figure 28).

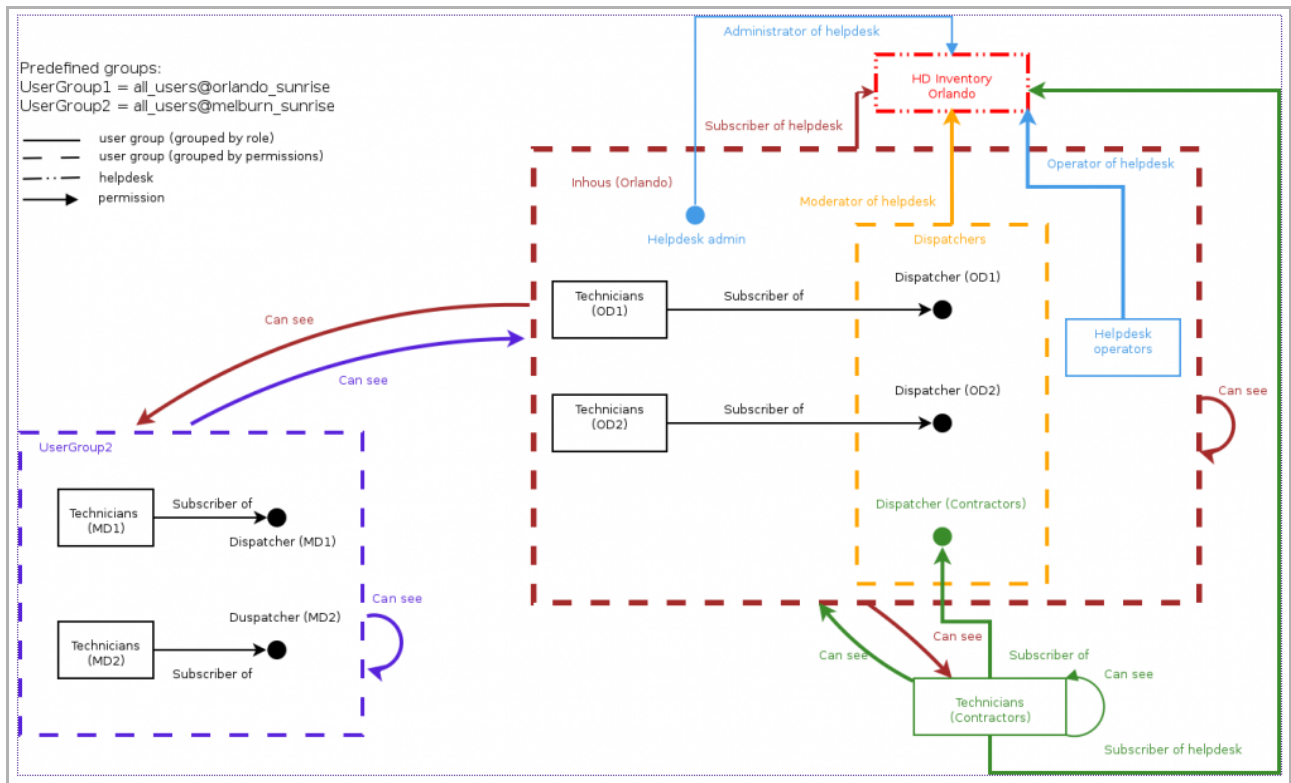


Figure 28: Permissions scenario diagram