Administration

The following system settings are available to users with technical administrator privileges:

- manage user accounts (fig. 1.1),
- view the results of the Web-client operations, e.g. user action reports (fig. 1.2),
- view the results of the completed background tasks of the server (fig. 1.2).

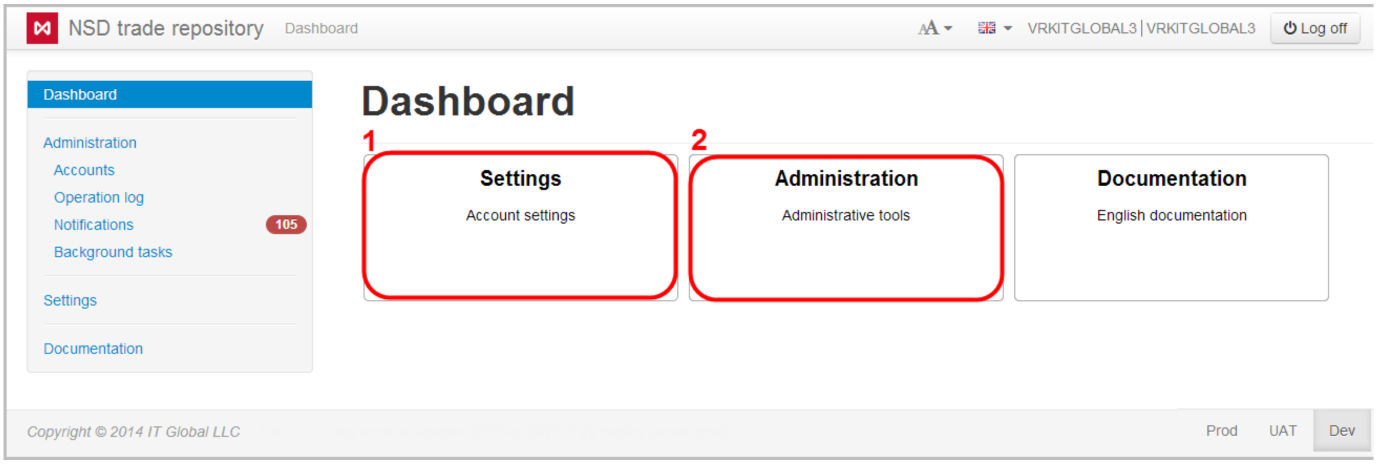


Fig. 1 – Administration form

On this page:

Accounts

Setting up accounts includes:

1. adding an account;
2. editing accounts;
3. deleting accounts;
4. creating additional accounts.

To set up an account, it is necessary to select Accounts in the sidebar menu. This form contains the following tabs:

- Active accounts;
- Deleted accounts;
- Role.

Active accounts

The tab Active accounts (fig. 2) displays information about the current system users.

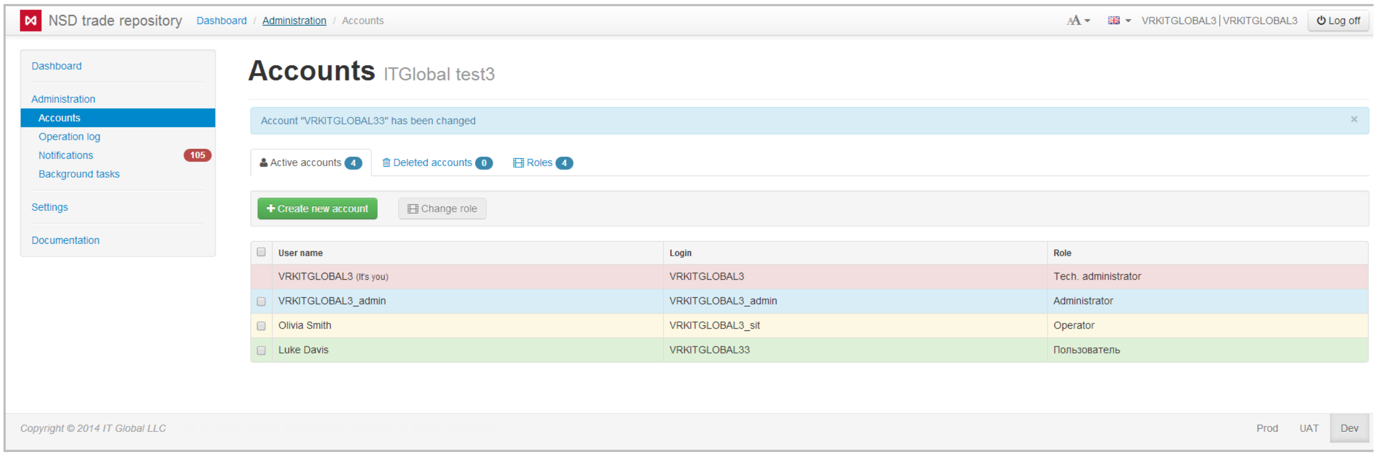
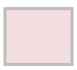
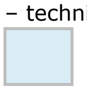
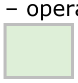


Fig. 2 – Active accounts tab

The background color of table rows corresponds to the type of user:

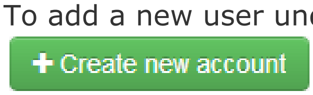
-  – technical administrator
-  – administrator;
-  – operator;
-  – custom role.

To download accounts list click 

button above the table. As a result, the table with the following data will be downloaded to a computer in the Excel format (.xlsx):

- User name;
- Login;
- Account role;
- E-mail address;
- Creation Date;
- Last Login date.

Adding accounts

To add a new user under the same party (client of the repository), click on button 

. This opens the form (fig. 3).

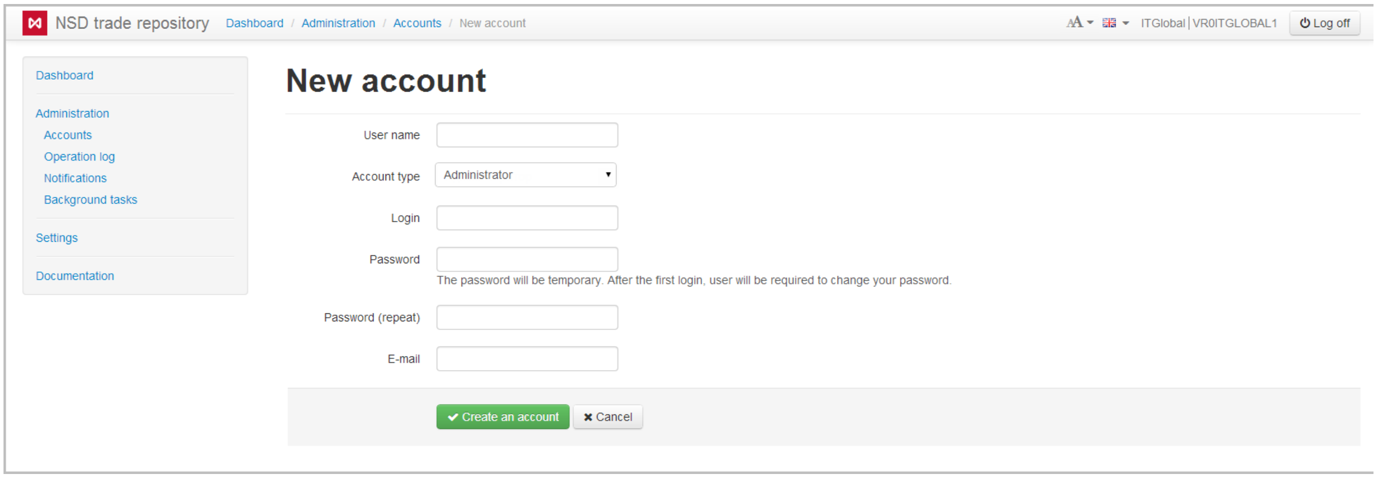
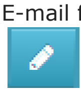
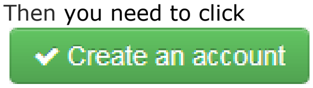


Fig. 3 – adding a new user

Fill in this form with account parameters:

- User name;
- Account type (administrator, operator or an another role);
- Login and password for authorization;
- E-mail for e-mail notifications about new messages in the repository. E-mail address are set up using the  button. The buttons are described in table 1.

Then you need to click 

button. The new account will be displayed in the list of active accounts. During the first attempt of authentication in the system the user will need to change password created by the technical administrator for information security. After that the user can continue to work in the system.

Editing accounts

Accounts are set up using the toolbar that pops up when hovering the mouse over the row of the account table (fig. 4).

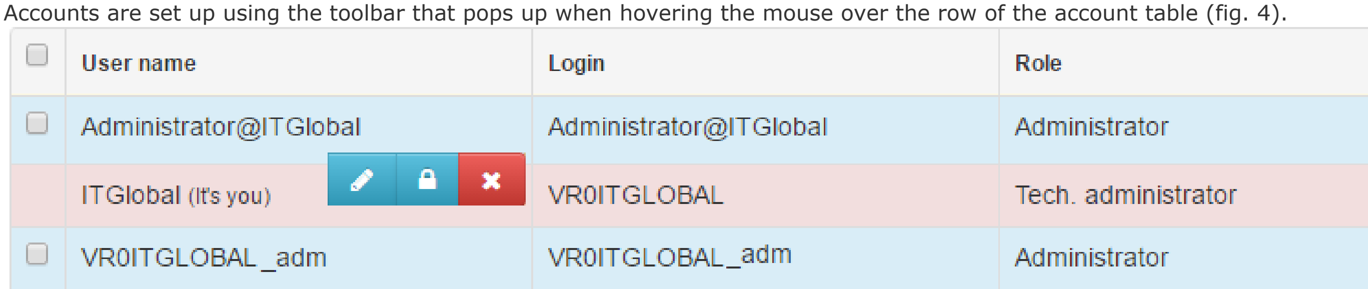
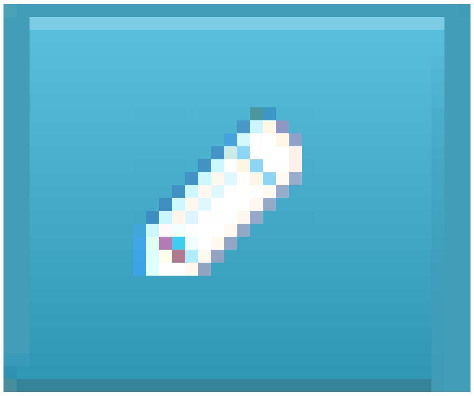
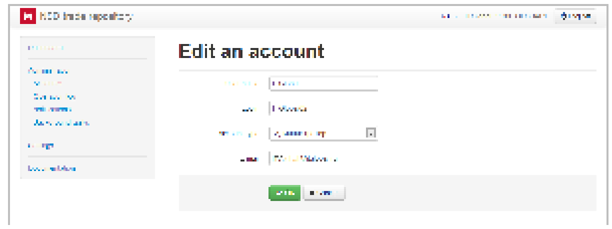
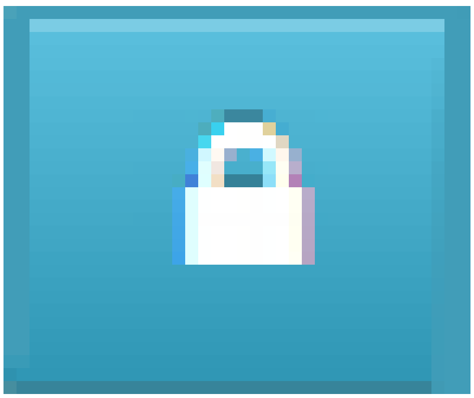
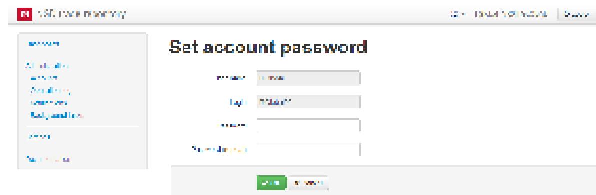
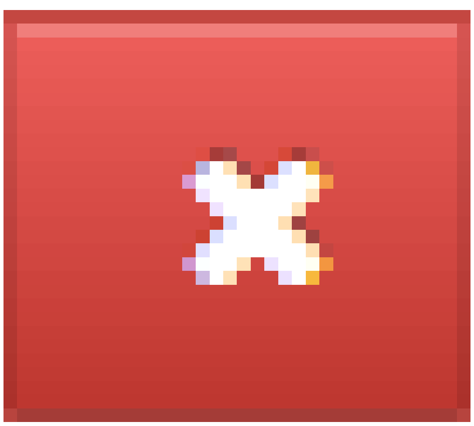
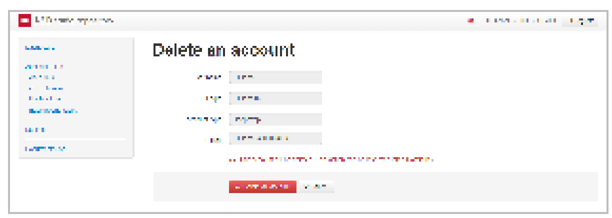


Fig. 4 – toolbar

The toolbar buttons are described in Table 1.

Table 1 – Toolbar buttons

Button	Description	Form

	Clicking on button the user is taken to the account editing form The account editing form allows the administrator to change name, login name, account type and email address	
	Clicking on button opens an account password change form After changing the password the technical administrator must deliver the new password to the user. When the user first logs into the Web-client, he must change the password to be able to further work in the system	
	Clicking on this button the user is taken to the delete account confirmation form. Deleted user accounts are displayed in the Del eted accounts tab	

Changing roles

There are two ways to change user roles.

The first way: click the

button. As a result, the account editing form will open. In this form you need to select a value in the Account type drop-down list (fig. 5.1) and click OK button to save it (fig. 5.2).

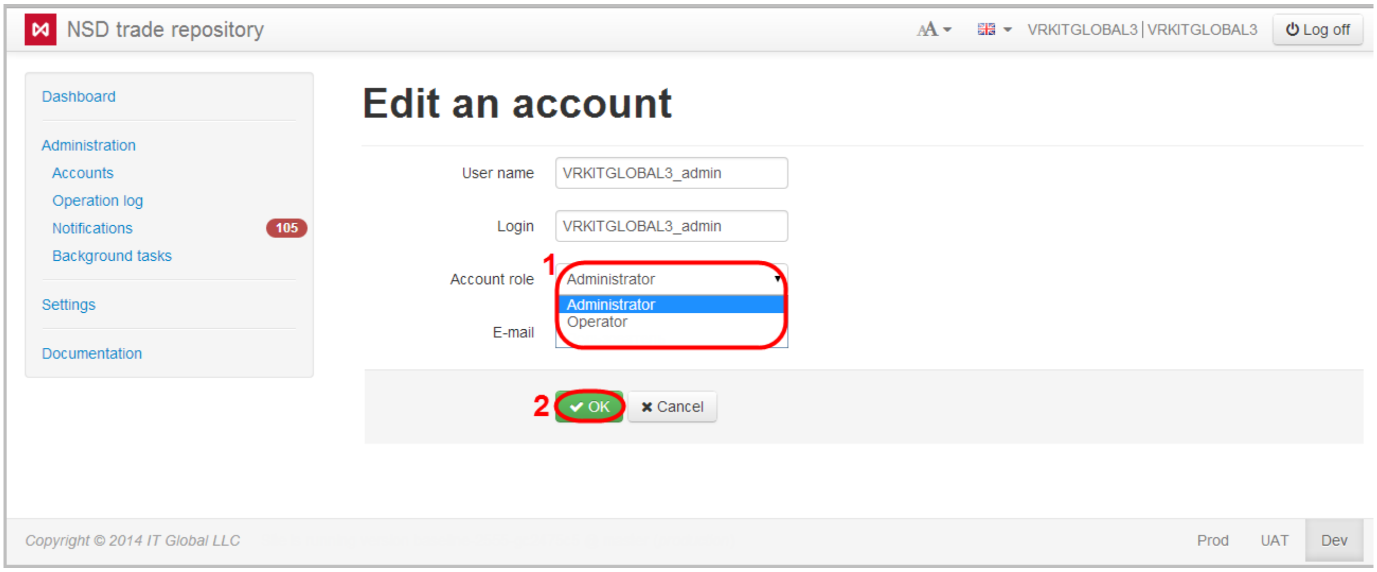


Fig. 5 – changing roles

The second way:

1. check the appropriate checkboxes at the accounts to be changed (fig. 6.1). As a result, the Edit role button will be shown;

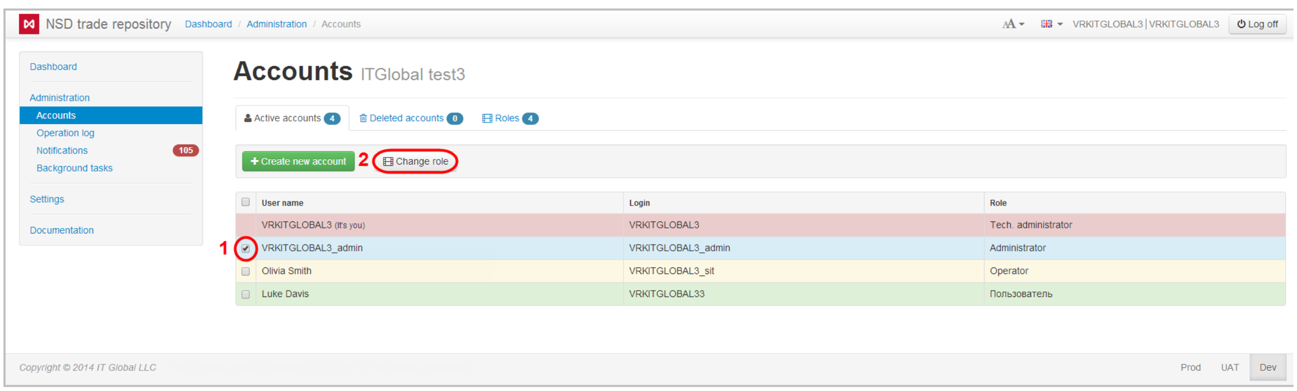


Fig. 6 – Role tab

2. click the Edit role button (fig. 6.2);
3. choose the necessary role (fig. 7.1);

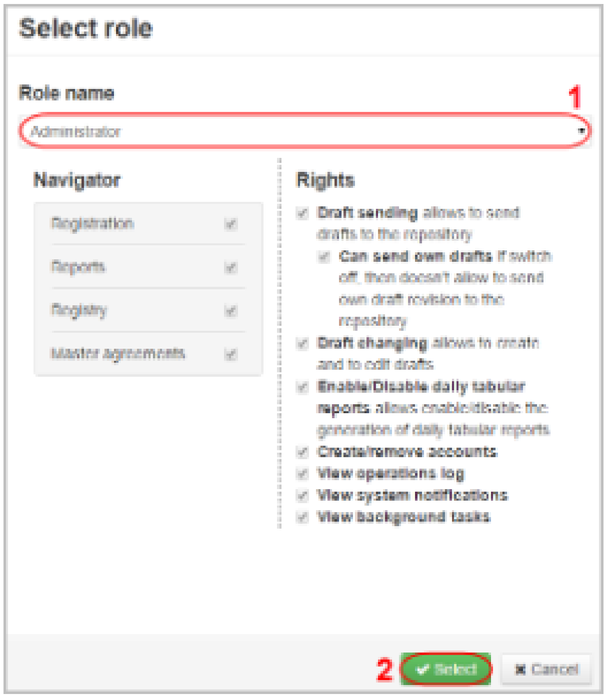


Fig. 7 – changing the account type

4. click the Select button (fig. 7.3) to apply settings.

Deleted accounts

The tab Deleted accounts displays a list of deleted accounts. You can restore a deleted account by clicking the

button, which opens on hovering the mouse over the row in the table. The restored accounts are displayed in the Active accounts tab (fig. 8).

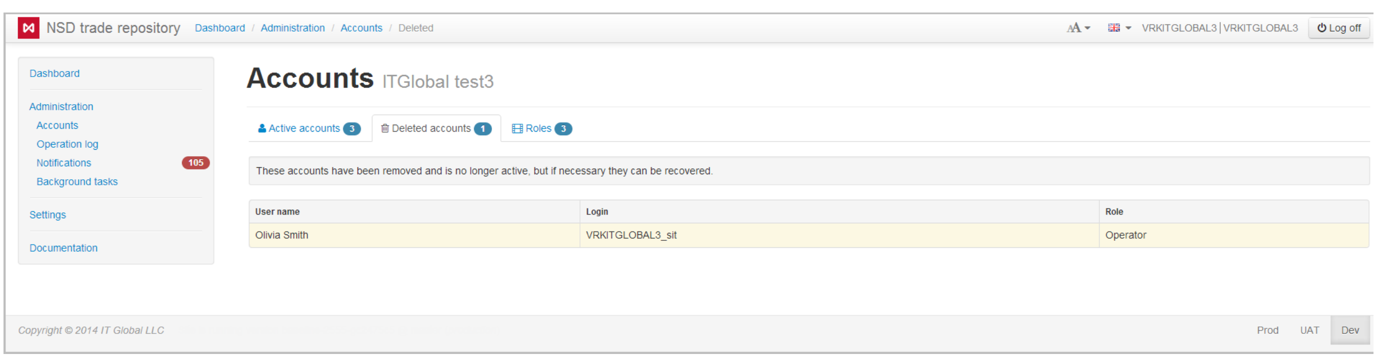


Fig. 8 – Deleted accounts tab

User roles in the system

By default in Web-client has three types of accounts (technical administrator, administrator, operator). The list of available roles is displayed in the Role tab (fig. 9).

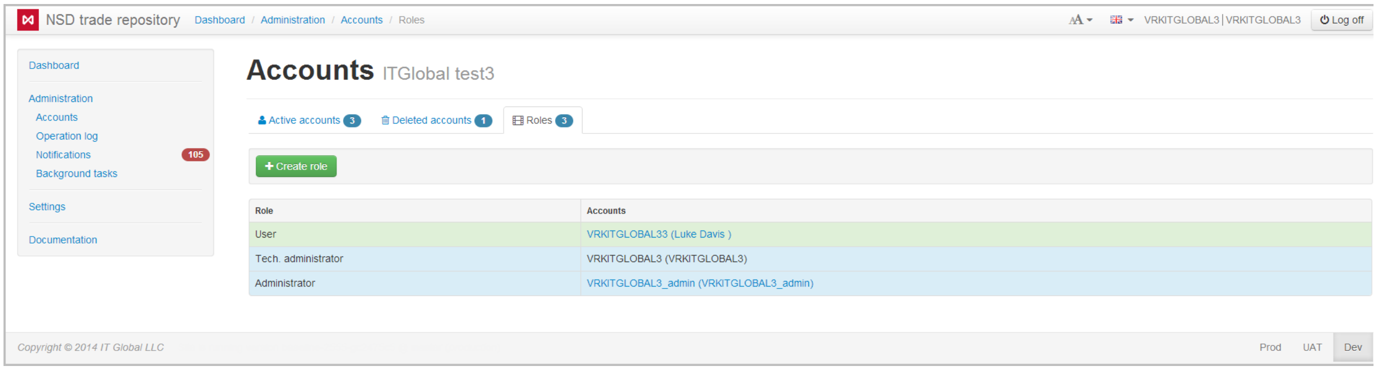


Fig. 9 – Role tab

If the the parameters of the basic roles are not suitable for solving problems, you can create custom roles and specify access rights for them. To do this:

1. click on the
   

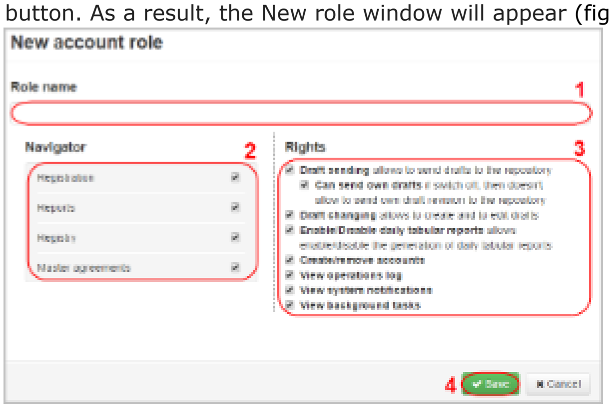
   button. As a result, the New role window will appear (fig. 10.1);
   

   Fig. 10 – new account role

2. enter the role name (fig. 10.1);
3. specify forms and rights available for the role by checking the appropriate checkboxes (fig. 10.2 and 10.3);

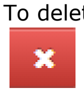
   > To use tabular reports you need to specify Reports (fig. 11.1) form and Enable/Disable daily tabular reports rig ht (fig. 11.2) by checking the appropriate checkboxes

4. click the Save button (fig. 10.4).

As a result, a new role will be created. You can change access rights of the role using the

button in the pop-up toolbar. Clicking the button opens a window, where you will need to enter the required values and click the Save button.

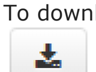
To delete a custom role you need to click on the



button. If the Web-client has an active account with this role, the button will be unavailable.

> You cannot delete or edit the basic roles.

To download role list click



button above the table. As a result, the table with the following data will be downloaded to a computer in the Excel format (.xlsx).

Operations log

The operations log records all events that occurred in the system during the user experience. Operation logs are used to determine the source of current system malfunctions, as well as to prevent possible problems. The information in the log (fig. 11) is displayed in the form of a table that contains:

- operation number;
- date and time;
- user name;
- category and the name of the operation.

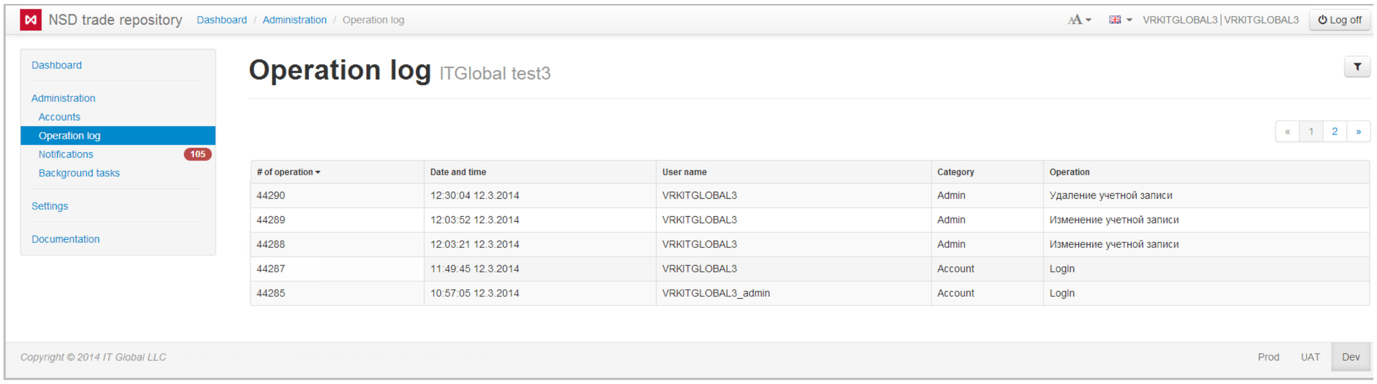
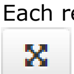


Fig. 11 – operations log

Each record in the table can be opened for detailed view (fig. 12) with the button



that pops up when hovering the mouse over the table row.

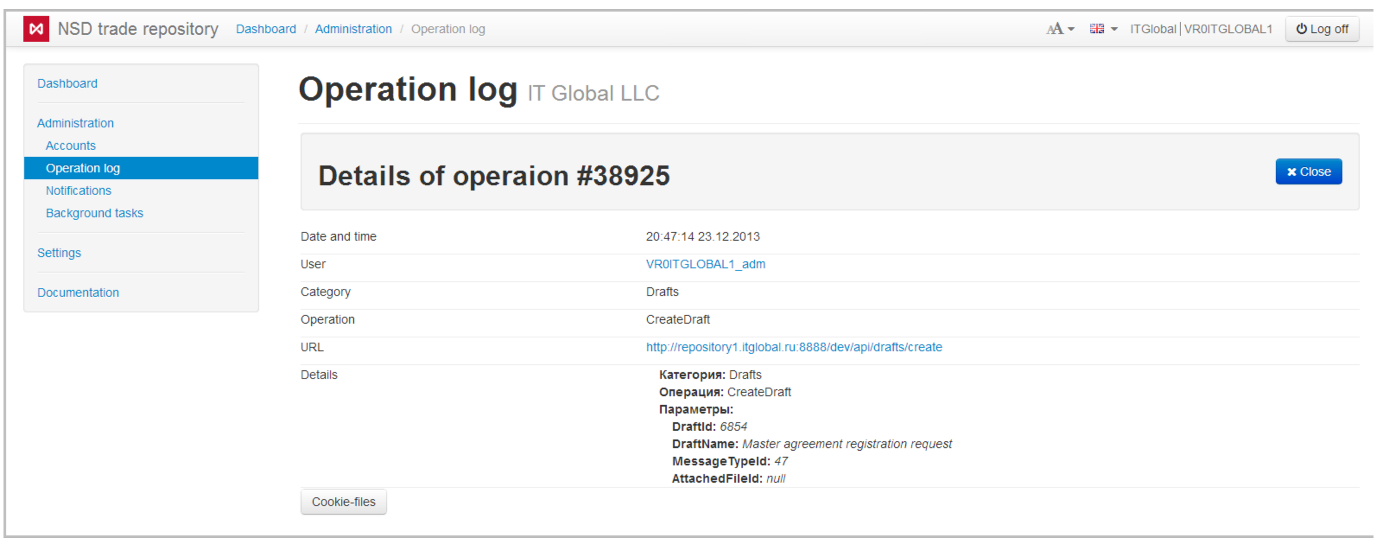
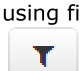


Fig. 12 – operation details

By default, the log displays all operations. Certain operations (for example, performed by an administrator) can be viewed using filters. To apply filters, to open the settings bar by clicking on button



and define the required parameters (fig. 13).

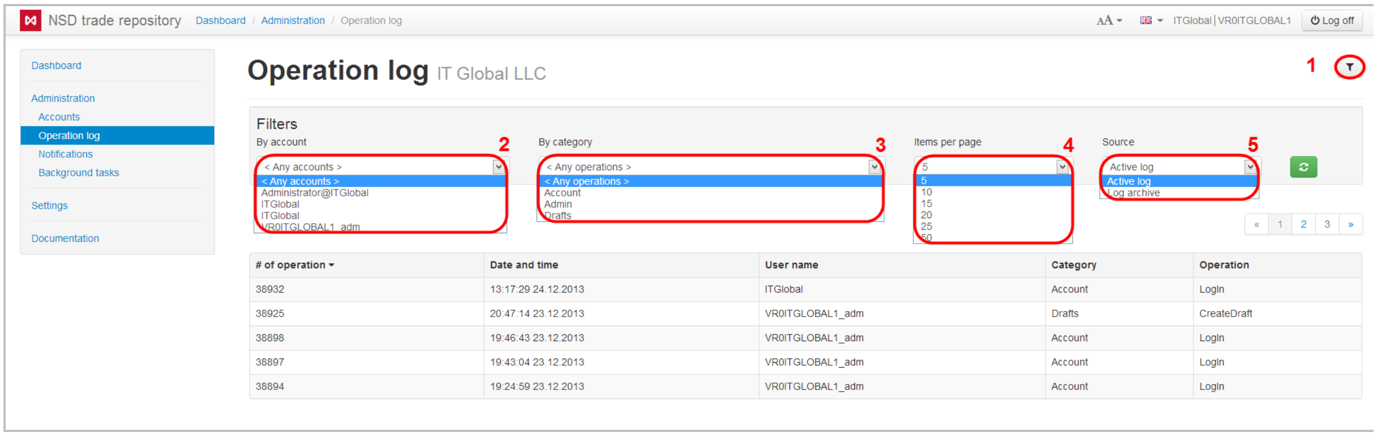


Fig. 13 – setting up filters

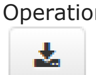
Filters implemented in the Web-client are described in Table 2.

Table 2 – Filters for configuring the operations log

Filter number on fig. 13	Filter name	Description
2	By accounts	The filter is used to display operations that were performed under a specific account
3	By category	The filter is used to display operations of the following categories: • Account – this category displays operations that were performed to an account (login/logout, password change); • Admin – this category displays the operations that were performed with an account (create, edit, delete account); • Drafts – this category displays operations that were performed with draft documents.
4	Entries per page	The filter is used to set the number of transactions to be displayed on a page
5	Section	The filter is used to display Archive that contains operations performed 7 days ago

Operations corresponding to your search criteria will be displayed in the table.

Operations log can be downloaded to a computer in the Excel format (version excel 2007/2010) by clicking the



button above the table. If the filter is not configured, the entire log will be downloaded. If set filter settings, the specific events will be downloaded.

Notifications

The Notifications form (fig. 14) displays a list of system transactions and errors that occurred during their performance. The notification contains time (fig. 14.1) and text of the operation (fig. 14.2). Notifications are displayed in order of receipt. New incoming messages are displayed at the top of the table.

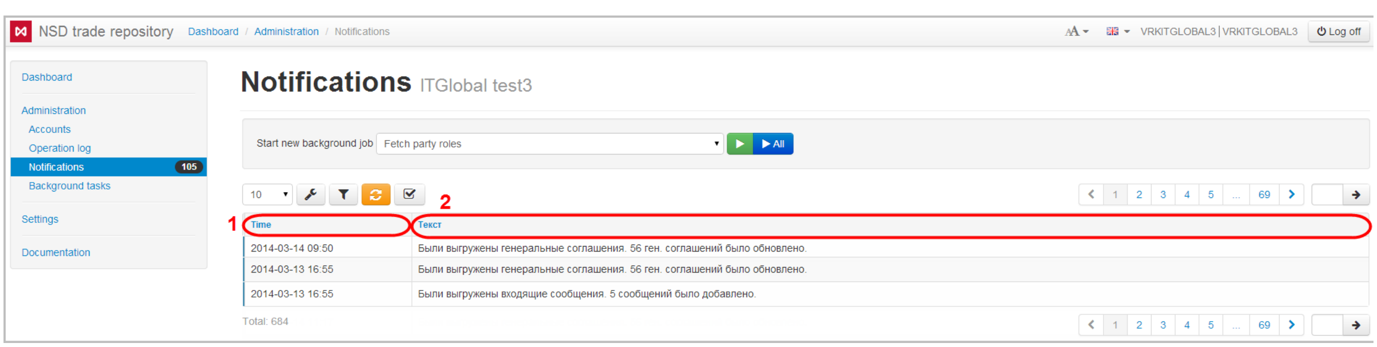


Fig. 14 – Notifications form

In this form, the following categories of notifications are available for viewing:

- export of the BRA roles;
- export of master agreements;
- export of outgoing messages;
- export of incoming messages;
- export of contracts;
- export of TransfersAndExecution;
- export of contract statuses;
- export of packages from the repository.

To start all operations click

(fig. 15.1). To start a specific category of tasks you need to select a category from the drop-down list (figure 15.2) and click

(fig. 15.3).

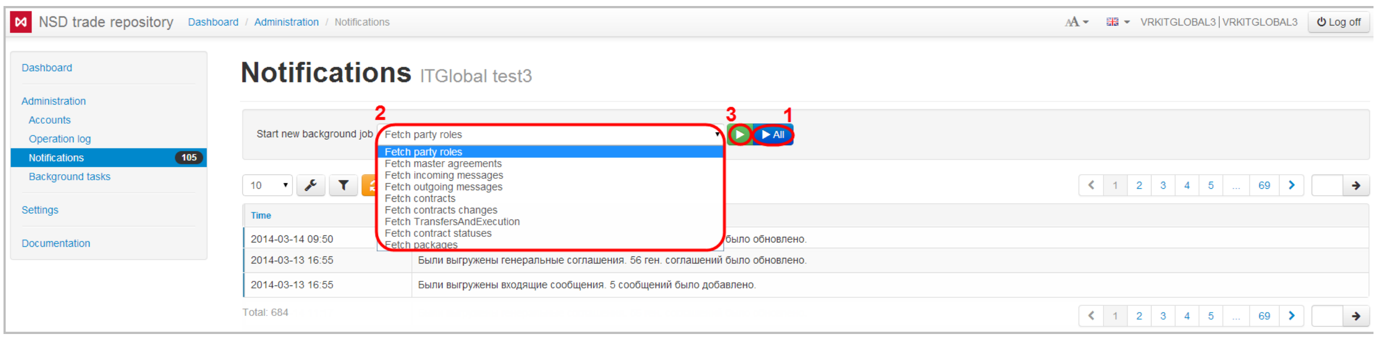


Fig. 15 – select the notification category

The Notifications form displays not only informational messages, but also system errors. To view them:

1. click on the  button;
2. click on  in the Display filed;
3. select the type of notifications from the dropdown list (fig. 16.1);
4. click on  (see fig. 16.2).

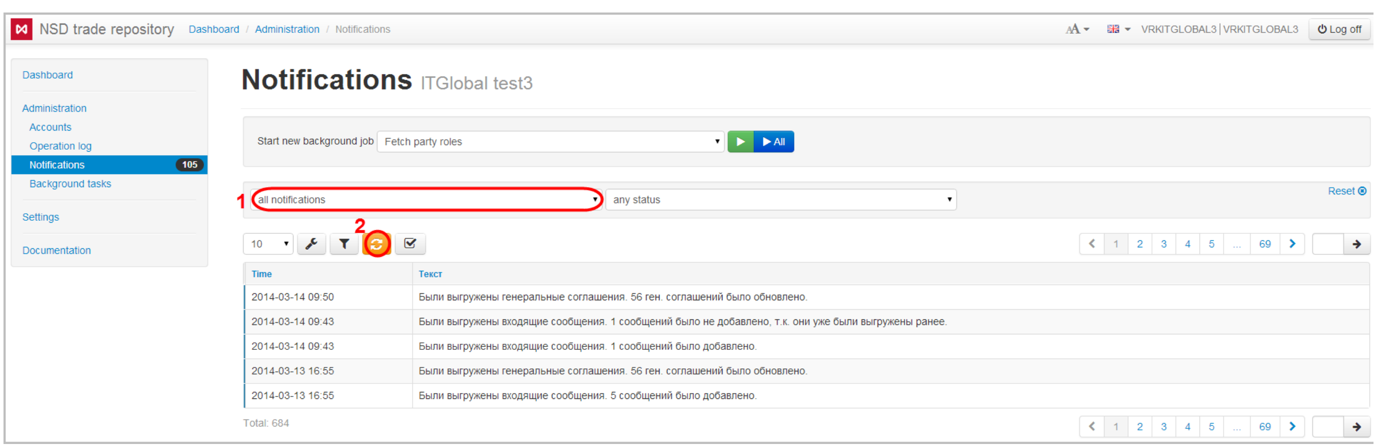


Fig. 16 – select the notification type

Example of a system error messages is shown in fig. 17.

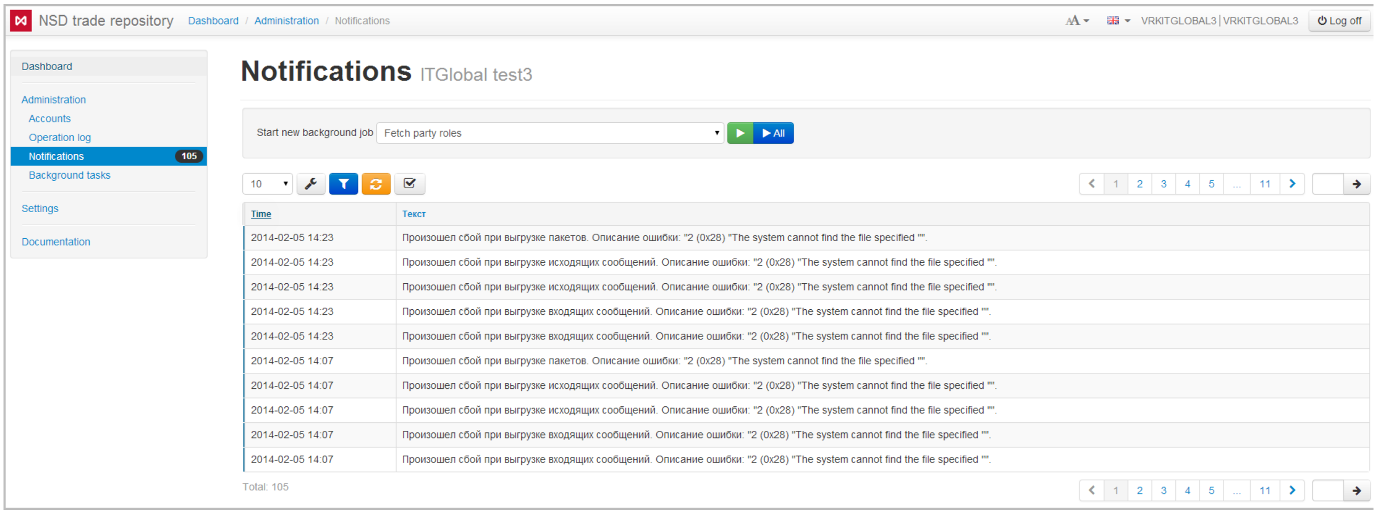
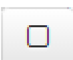


Figure 17 – system error notification

For user's convenience the viewed messages can be grouped under a separate category Read. To do this click on button



in front of the necessary notifications. To see current and viewed notifications click on the drop-down list (Fig. 18.1), select the type of messages and click Show (Fig. 18.2).

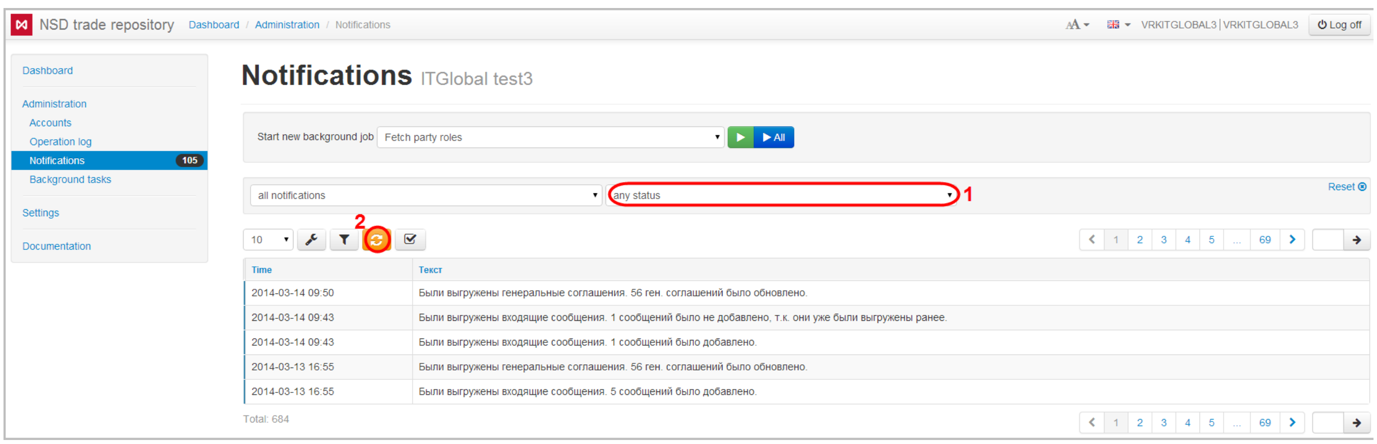


Fig. 18 – select the type of notification

Background tasks

The Background tasks form contains a list of system messages about operations that are at the stage of execution. The following categories of tasks are available for viewing in this form:

- export of the Base Reporting Agent roles;
- export of master agreements;
- export of outgoing messages;
- export of incoming messages;
- export of contracts;
- export of TransfersAndExecution;
- export of contract statuses;
- export of packages from the repository.

Click

to start all background tasks. To start a specific category click

on the drop-down list and select a category, then click on button

(fig. 19).

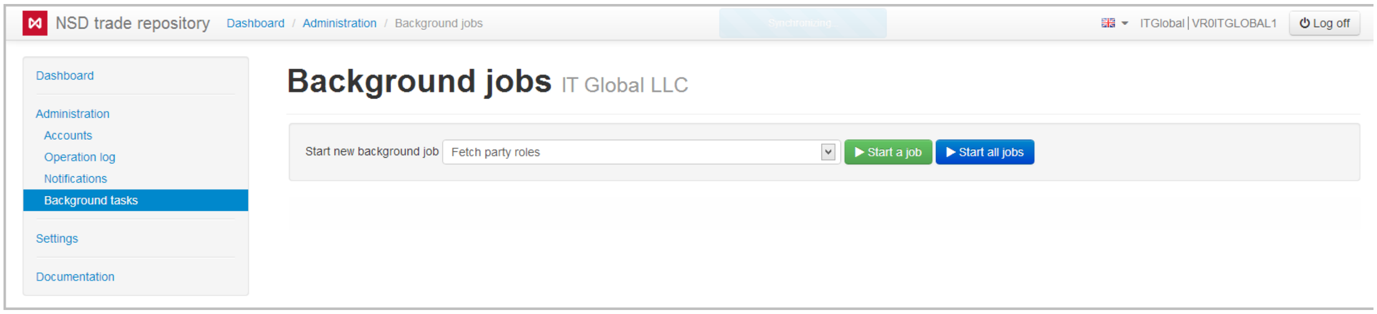


Fig. 19 – Background tasks form

This will display a list of tasks in the form of a table, where each row contains the time and the text of the task.

Import settings

To choose import mode go to AccountsSettings and set checkbox:

1.  – cleared messageId and correlationId;
    – import drafts without changes;
2. lock changing the Import mode;

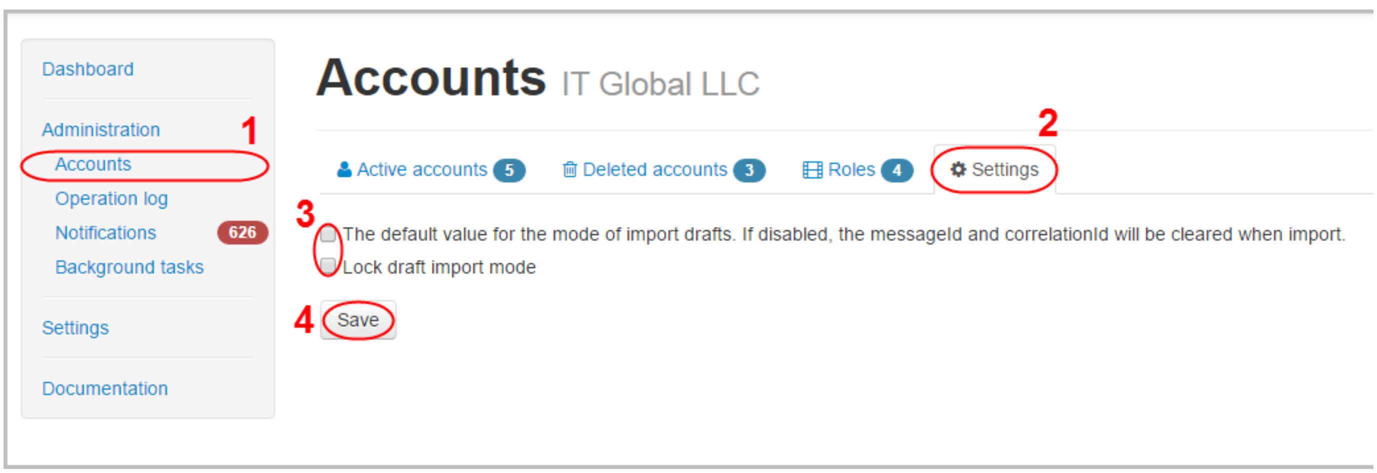


Fig. 20 – settings form

To save changes click Save button. Settings will be applied for for all users.