CATALYST

OrgAdmin

User Guide

CATALYST

Contents

Overview

CATALYST OrgAdmin is a web-based admin tool/application that allows an organization administrator (orgadmin) to create, set up and manage users, as well as have visibility of the licenses granted to their organization and control who can access those licenses. This guide is intended to assist an orgadmin to understand how basic tasks in the system can be carried out.

Menu Items

The left-hand Navigation Menu includes 5 main sections:

1. Dashboard
2. Groups
3. Users
4. Invitations
5. Licenses

To access the profile information/page of the logged in user:

- In the top right corner the user can click on the cog icon and a dropdown with 2 options will show:
    1. My profile (which opens a new browser window and takes the user to their user profile page)
    2. Logout

To select the active organization:

- If the user has rights to manage a few organizations the user can change the active organization on the right side of the Upper Panel where the Organization name is displayed. By clicking on Organization name a dropdown with options will be shown.

1. Dashboard

After you successfully sign in to OrgAdmin, you will land on the Dashboard, which displays an overview/summary of the main sections of the applications.

1.1. Dashboard view – Groups

To use the dashboard as a Group:

1. Select View to navigate to the Groups section to see all groups.
2. Select Reload data to reload data from database.
3. The 3 most recent groups will be listed. For each of the listed groups you can:
    - See the status indicators (colored circles alongside with group name) that show information about the group type:
        i. Employees group – green
        ii. License consumers groups – blue
        iii. Custom groups - gray
    - Select the option to view its Members. A dialog will appear showing all organization users. Group members show as selected. You can find more information about the groups page on the Groups section.
    - Select the option to Invite a user to this group.

4. Total groups number is displayed.

1.2. Dashboard view - Users

To use the dashboard as a User:

1. Select View to navigate to the Users section to see all users.
2. Select Reload data to reload data from database.
3. The 3 most TBC users will be listed. For each of the listed users you can:
    - See the status indicators (colored circles alongside with username) that show information about the user activity:
        i. Active user - green
        ii. Inactive user (users that have not logged in for 30 days) - amber
        iii. Admin (users that can access OrgAdmin) - blue
    - Select the option to view the Groups the user belongs to. A dialog will appear showing you all the organization's groups. The groups the user belongs to show as selected. You can find more information about the groups page on the Groups section.
    - Select the option to view the Licenses the user has access to. A dialog will appear showing you all the licenses that are available for the selected user. You can find more information about the licenses page on the Licenses section.
4. Total numbers for all users, Inactive users and Admins are displayed if any.

1.3. Dashboard view – Invitations

To use the dashboard to see invitations:

1. Select View to navigate to the Invitations section to see all invitations.
2. Select Reload data to reload data from database.
3. A set of maximum 3 invitations will be listed. For each of the listed invitations you can:
    - See the status indicators (colored circles alongside with username) show information about the invitation status:
        i. Accepted - green
        ii. Pending (Invitation was not accepted by the user) - grey
        iii. Unsent (invitations that were not sent due to some technical issues) – amber
        iv. Declined (declined by user) - red
    - Select the option to Resend the invitation to the user. A dialog will appear requesting you to confirm the invitation resend.
    - Select the option to Remove the invitation to the user. A dialog will appear requesting you to confirm the invitation removal.
4. Total numbers for all invitations, Unsent, Accepted and Pending are displayed if any.

1.4. Dashboard view – Licenses

To use the dashboard to see Licenses:

1. Select View to navigate to the Licenses section to see all Licenses.
2. Select Reload data to reload data from database.
3. A set of maximum 3 Licenses will be listed. For each of the listed licenses you can:
    - See the status indicators (colored circles alongside with license item name) that show information about license status. Tooltips can be used for more information about license.
        i. Valid license - green
        ii. Expiring License (the expiration date is within 7 days) - amber

    iii. Invalid license (Expired license) - red
    iv. Deactivated license - red

- Select the Usage option to see license usage and manage the license. A dialog will appear that includes all users associated with the organization. You can find more information about the license's usage on the Licenses section.
- Total numbers for all licenses, Invalid licenses, Expiring Licenses, Valid licenses and Deactivated licenses are displayed if any.

2. Groups

Groups section offers access to view and manage the list of current user groups. The details for the groups including the name, detail and view the entitlements, members and licenses for that group.

The top table navigation includes:

- Create button
- Search window
- Select Columns to display button
- Reset defaults button
- Reload data button

Groups table includes 3 columns: Type, Name, Description, and Tools (that includes the range of possible actions you can apply to the existing Group).

There are following actions that can be done through this page menus:

- Create Group
- Remove Group
- Manage Group Details and Entitlements
- Manage Members
- Send Invite to the user to join a particular group

2.1. Creating a Group

To create a group:

1. Open Group Section.
2. Select "Create" from Open Group page.
3. Enter Name.
4. Enter Type - a tag to identify the audience which allows building default logic on membership per group type. It can be:
    a. *employees* - denotes group type formed of an organization's employees with built-in default authorization logic. *There is only one group associated with this type that can exist.* This logic includes the built-in role Organization Member to activate on users connected with an organization via the employees group. It is an efficient way of applying default authorization rules without user specific management.
    b. *licenseConsumers* - denotes logically a group type which will be able to consume licenses from an organization entitlement. No logic is enforced based on this group type and it is provided as an example way of grouping users that may be external to an organization but are allowed to consume licenses that the organization owns.

   c. *Custom* values can also be defined (denotes group types created by an administrator that have meaning in a specific business case and should be used to assist with business logic in specific customer cases).
5. Enter Description.
6. Select one or several Entitlements from the list available for the Organization. Entitlement is a container for licenses. An organization can have one or more entitlements. After you select the Entitlements all licenses that are part of them will be available for particular group' members.

2.2. Managing Group Details and Entitlements

To manage Group details and entitlements:

1. Open Group section.
2. Select a particular group and click on three-dot menu from the Tools column.
3. Select View Group Details to see further information about the select group.
   a. Details section:
      i. Name (editable)
      ii. Type (partially editable):
         1. NOTE: *Employees group type cannot be changed.* You can create *licenseConsumers* or *Custom name type.*
      iii. Description (editable)
      iv. Entitlements (editable) - shows the list of available entitlements for the Organization
   b. The user can enable/disable available entitlements for a particular group by selecting/deselecting it on this dialog.
   c. Each entitlement can be expanded by clicking on the entitlement name to reveal entitlement details
      i. Name
      ii. Consuming groups
      iii. Assigned licenses

2.3. Removing a Group

To remove a Group:

1. Open Group section.
2. Select a particular group and click on three-dot menu from the Tools column.
3. Select Remove.
4. Confirm the removal.

NOTE: A group with the Employee type cannot be deleted. This action will be displayed as inactive for a group of this type.

NOTE: OrgAdmin users can remove a user from their organization by removing the Group where they belong to. The user is then detached from the organization but will continue to have a personal account in the system. You can check what groups the user belongs to via the User section.

2.4. Managing Group Members

To manage Group members:

1. Open Group section.
2. Select a particular group and click on three-dot menu from the Tools column.
3. Select Members to manage Group members.
4. A new view will open with list of all Organizational users - Group members and their emails show as selected.
5. Search for particular users by name or email address using the search bar.
6. Select (or deselect) the users you want to add (remove) to (from) a particular group.
7. Click Apply to save your changes.
8. Confirmation dialog will appear with the list of members you want to add or remove.
9. Review it and confirm or decline this action.

NOTE: OrgAdmin users can remove a user from their organization by removing them from all the groups. The user is then detached from the organization but will continue to have a personal account in the system. You can check what groups the user belongs to via the User section.

2.5. Inviting a member to a Group

To invite a member to a group:

1. Open Group section.
2. Select a particular group and click on three-dot menu from the Tools column.
3. Select Send Invite.
4. A new view will open where the following information needs to be provided:
    a. Recipient email
    b. Recipient name
    c. Assign Admin access option (allows you to assign OrgAdmin access to the person getting invited)
    d. Personal message (optional)
    e. Select Invite to send the Invitation
5. Once an invitation has been accepted the member will appear in the Group's table.
6. Invitations status can be seen if you navigate to the "Invitations" section in the menu.

2.6. Inviting a list of members to a Group (CSV import)

To invite a list of members to a Group:

1. Open Group section.
2. Select a particular group and click on three-dot menu from the Tools column.
3. Select Send Invite.
4. A new view will open where can click on Import button.
5. You will be prompted to select a CSV file. The CSV file should contain 2 column headers on the first row to allow mapping of the data. The CSV must contain values for the following data fields:
    a. Name
    b. Email
6. If the column mapping is not successful, then you'll be prompted to select the correct column mapping and resolve all other errors. The following information needs to be provided:
    a. Assign Admin access option (allows you to assign OrgAdmin access to all the contacts which are to be invited).
    b. Personal message (optional).
    c. Select Invite to send the Invitation.
7. Once an invitation has been accepted the member will appear in the Group's table.
    a. Invitations status can be seen if you navigate to the "Invitations" section in the menu.

3. Users

Users section offers access to view & manage the list of current users. The details for the users include the name, detail and view of the groups and entitlements for that user.

The top table navigation includes:

- Invite button
- Search bar
- Select Columns to Display button
- Reset defaults button
- Reload data button

Users table includes 5 columns by default: Status, First Name, Last Name, Email, and Tools (that includes range of actions you can apply to the existing User). There are optional columns that can be displayed (by using Select Columns to Display button): Display Name, Nickname, Professional Title, and Phone Number.

3.1. Inviting a User

To invite a user:

1. Sign in in your OrgAdmin application.
2. Open User section.
3. Select “Invite” from User section.
4. A new view will open where the following information needs to be provided:
    - Recipient name
    - Recipient email
    - Select a Group or Groups to which you want to invite the contacts to (All licenses that are available for this Group will be available for the user right after the user accept the invitation)
    - Assign Admin access option (allow you to assign OrgAdmin access to new invited user)
    - Personal message (optional)
    - Select Invite to send the Invitation
5. Once an invitation has been accepted the member will appear in the User’s table.
    - Invitations status can be seen if you navigate to the "Invitations" section in the menu.

3.2. Viewing Profile Details

To view profile details:

1. Sign in in your OrgAdmin application.
2. Open User section.
3. Select a particular user and click on three-dot menu from the Tools column.
4. Select Profile Details to see further information about the select user.
5. Details are shown:
    - Display name
    - Status
    - Professional title

- First name
- Last name
- Nickname
- Email
- Phone

3.3. Managing User Groups

To manage User groups:

1. Sign in in your OrgAdmin application.
2. Open User section.
3. Select a particular user and click on three-dot menu from the Tools column.
4. Select Groups to see further information about Groups the user belongs to.
5. A new view will open with a list of all Organizational Groups. All groups that the user belongs to are shown as selected.
6. Select (or deselect) the groups you want to add (remove) a particular user.
7. Select Apply.
8. Confirmation dialog will appear with list of groups you want to add or remove.
9. Review it and confirm or decline this action.

3.4. Managing User Licenses

To manage User licenses:

1. Sign in in your OrgAdmin application.
2. Open User section.
3. Select a particular user and click on three-dot menu from the Tools column.
4. Select Licenses to see further information about user licenses.
5. A new view will open with a list of Licenses Items the user has entitled to use. License table includes 4 columns: License, Reserved, Blocked and In Use.
   - Each license can be expanded by clicking on the license name to reveal license details. To see more information about that please read *View License Details* section.
6. Select a particular user and click Reserve to reserve a license seat for the user. After reservation, the button will be highlighted in green and renamed to Release. Click on it to release a license.
7. Select a particular user and click on the Block button to block a license seat reservation for the user. After this, the button will be highlighted in red and renamed to Release. Click on it to release a seat.
8. In Use displays information if the license is consuming by the user at the moment (consumed license will be shown as green circle with a check mark).
9. Select Save.
10. Confirmation dialog will appear. Review it and confirm or decline this action.

3.5. Assigning/Unassigning Admin Access

To assign/unassign Admin Access:

1. Sign in in your OrgAdmin application
2. Open User section
3. Select a particular user and click on three-dot menu from the Tools column
4. Select Assign admin access
5. Confirm the change

After the User is granted admin access the other option will appear in menu Unassign admin access. You can remove admin access by clicking this option.

3.6. Removing a User

To remove a user:

1. Open User section
2. Select a particular user and click on three-dot menu from the Tools column
3. Select Remove from Organization
4. Confirm the removal

NOTE: Please note that if you remove a user from their organization the user will be then detached from the organization, and you will not be able to manage this user. The User will not be able to use any of the licenses belonging to the Organization but will continue to have a personal account in the system.

4. Invitations

Invitations offers a way to manage and check the status of user invitations sent out.

The top table navigation includes:

- Create button
- Search window
- Select Columns to display button
- Reset defaults button
- Reload data button

The Invitations table includes 5 columns: State, Recipient Email, Recipient Name, Groups and Tools (that includes the range of possible actions you can apply to the existing Group). There is an optional column that can be displayed (by using Select Columns to Display button): Organization admin

There are following actions that can be done through this page menus:

- Send Invitation
- View Invitation Details
- Resend Invitation
- Remove/Revoke Invitation

4.1. Inviting a User

Inviting a member assumes the person to be invited does not have an existing user account in the system. For dialog details please refer to the *Invite User section*.

4.2. Viewing Invitation Details

To view invitation details:

1. Open the Invitation section
2. Select a particular invitation and click on three-dot menu from the Tools column
3. Select Invitation Details to see further information about the select invitation
4. Details are shown:
    a. Recipient email
    b. State (Accepted, Pending, Declined or Unsent)
    c. Recipient name
    d. Admin access
    e. Inviter name
    f. Message

4.3. Resending Invitation

To resend an invitation:

1. Open the Invitation section.
2. Select a particular invitation (Pending or Unsent) and click on three-dot menu from Tools column.
3. Select Resend to send the invitation to a particular user.
4. Confirm the action.

4.4. Removing/Revoking Invitation

To remove/revoke an invitation:

1. Open the Invitation section.
2. Select a particular invitation and click on three-dot menu from the Tools column.
3. Select Remove to remove Accepted or Declined invitation from the table.
4. Select Remove to revoke Pending or Unsent Invitation. This action will prevent the User to become part of the Organization.
5. Confirm the action.

5. Licenses

The Licenses section offers a way to manage and check the status of user licenses and seat reservation.

The top table navigation includes:

- Search window
- Select Columns to display button
- Reset defaults button
- Reload data button

The Licenses table includes 9 default columns:

- State (Valid, Expiring, Invalid, Deactivated)
- Name
- Entitlement (the license belongs to)
- Type
- Seats: Total
- Seats: Consumed

- Seats: Available
- Tools (that includes the range of possible actions you can apply to the existing Group).

There is a number of optional columns that can be displayed (by using Select Columns to Display button): Valid from, Valid Until, Model, Use Count:Total, Use Count:Consumed, Use Count: Available, Use Time:Total, Use Time:Consumed, Use Time:Available.

5.1. Viewing License details

To view license details:

1. Open the Licenses section.
2. Select a particular license item and click on three-dot menu from the Tools column.
3. Select License Details to see further information about the select license.
4. Details are shown:
    a. Name (name of the license)
    b. State (Valid, Expiring, Invalid, Deactivated)
    c. Entitlement (the license belongs to)
    d. Valid from/Valid until dates
    e. Model
    f. Type (Seats)
    g. Reserved (Number of Reserved Seats)
    h. Total seats (Total Number of Seats)
    i. Consumed seats (Number of Consumed Seats)
    j. Available seats (Number of Available Seats)

5.2. Managing License Usage (Reserving/Blocking Seats)

To manage license usage:

1. Sign in in your OrgAdmin application.
2. Open Licenses section.
3. Select a particular license item and click on three-dot menu from the Tools column.
4. Select Licenses Usage to manage License Usage.
5. A new view will open that includes all users associated with the organization. License Item Usage table includes 4 columns: User, Reserved, Blocked and In Use.
    a. Each User row includes username, user email and user status information
    b. Each user can be expanded by clicking on the User name to reveal User details. Please note that you will be redirected to a new screen. To see more information about that please read the *View User Details* section.
6. Select a particular user and click on the Reserve button to reserve a license seat for the user. After reservation, the button will be highlighted in green and renamed to Release. Click on it to release a license.
7. Select a particular user and click on the Block button to block a license seat reservation for the user. After this, the button will be highlighted in red and renamed to Release. Click on it to release a seat.
8. In Use displays information if the license is consumed by the user at the moment (consumed license will be shown as green circle with a check mark).
9. Click Save.
10. Confirmation dialog will appear.
11. Review it and confirm or decline this action.