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This manual is intended for “Member Administrators” who will be using Projects.IODE to manage the project.

1 Administrator permissions

Below we show the permissions of the three types of users (owner company employee with administration privileges; owner company employee; client company employee). It is clear that the administrator has all rights.

<table>
<thead>
<tr>
<th></th>
<th>Administrator</th>
<th>Member (owner company employee)</th>
<th>Client (client company employee)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can be administrator</td>
<td>X</td>
<td>X</td>
<td>-</td>
</tr>
<tr>
<td>Create a project</td>
<td>X</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Create client group</td>
<td>X</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Add members</td>
<td>X</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Add clients</td>
<td>X</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Create milestones</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Modify other user’s milestone</td>
<td>X</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Create task lists</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Modify own task lists</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Modify other users’s task list</td>
<td>X</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Create tasks</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Modify own task</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Modify other users’s task</td>
<td>X</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Upload files</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Create folder</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Add your own revision</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Add revision of other file</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Create tags</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Modify your own tags</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Modify other user’s tag</td>
<td>X</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Create forms</td>
<td>X</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Modify your own form</td>
<td>X</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Modify other user’s form</td>
<td>X</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

Table 1

Note that the administrator can assign the rights to:
- manage messages
- manage tasks
- manage milestones
- upload files
- manage files
- assign tasks to members of owner company
- assign tasks to members of other clients
In this manual we will only detail the actions that an administrator can take which another user cannot. These are:

- Creating a project
- Creating a member (owner company employee)
- Creating a client (client company)
- Creating a user (employee of client company)
- Send mass mail

Note: this manual does not describe the System configuration modification as this should only be used by the system administrator.

## 2 Creating a project

As an administrator, after logging in you will see the “Add project” in your dashboard:

After clicking on Add project you will see this screen:

Enter the name of the project and a description. You can also select whether you wish the description to appear on the overview page or not. If you use short descriptions then tick yes. Otherwise tick no.

Click on Add project

Now if you click on the Projects
Tab you will see the list of projects that you “own”.

<table>
<thead>
<tr>
<th>Name</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aguilhas &amp; Somali Currents Large Marine Ecosystems</td>
<td>Edit</td>
</tr>
<tr>
<td>Caribbean Marine Atlas (CMA)</td>
<td>Edit</td>
</tr>
<tr>
<td>IODE-19 Work plan Implementation</td>
<td>Edit</td>
</tr>
<tr>
<td>Ocean Data Standards</td>
<td>Edit</td>
</tr>
<tr>
<td>Sandbox</td>
<td>Edit</td>
</tr>
</tbody>
</table>

You can now either go to that project (click on the name of the project), you can edit the name and description (click on Edit) or Delete a project.

3 Creating companies and users

3.1 Introduction to users

One of the most important permissions of an Administrator is the ability to add users to a project.

Again we need to distinguish the types of users: either those that belong to the owner company (and any of these can also be made administrator) or those who belong to a client company (they can never be administrator).

You can create as many client companies as you wish but there can be only one owner company.

So in the case of IODE, the IODE Officers could be added as “owner company employees” (which are named members) and all IODE experts who will carry out the tasks should be made employees of “client companies”. The client companies could be GE-MIM, GE-BICH, ETDMP, etc.

It is important to note here that client employees can NOT modify milestones that were created by someone else.

What each user type can and cannot do is detailed in Table 1

User creation is done through the Administration section
If you click on the Administration link then you get the following menu:

**Administration**

**Welcome**

Welcome to the administration panel. Using this tool you can manage your company data, members, clients and projects you are involved in:

- Company
- Members (Add user)
- Clients (Add client)
- Projects (Add project)
- Configuration
- Upgrade

### 3.2 Editing the company information

There can be only one company. So you can edit the settings of the company but you cannot create companies.

You can update the company info (e.g. address, telephone etc). In the same screen you will see the Users of the company (i.e. members).

As administrator you can update the profile, change the password, update the avatar (picture), set permissions for each user or delete the user. You should be very careful modifying these.
3.3 Creating a member (owner company employee)

3.3.1 Add user

Note: under Password you can either have the system generate a password, or you can specify a password yourself. It is recommended to use the same username and password as the user has in OceanExpert. (in a future version it will be possible to import users from OceanExpert)

An owner company employee can be given administrative right and can also be added automatically to new projects (this should only be set for top level administrators).

By default a new user will receive an email notifying him/her that he/she has been added as a user.

In the permissions section you can then add the use to existing projects.
3.3.2 Update profile

As you can see quite a bit of information can be added for the users. In the yellow box you can see the username and company. You can change the company to the owner company or one of the client companies that you may have created.

In this box you can also make the user an administrator (be careful). You can also make it so that every time a project is created the user is automatically added to the new project as a user.

3.3.3 Change password

This allows to change the password of a user.
3.3.4 Update avatar

To personalize the site it is nice to see a picture of the users. These pictures are also known as avatars. You can upload such pictures.

3.3.5 Permissions

In this screen you can set the permissions for the user for each project. Here is an example:

As you can see for each project the options are:
- All
- Manage messages
- Manage tasks
- Manage milestones
- Upload files
- Manage files
- Assign tasks to members of owner company
- Assign tasks to members of other clients

3.4 Creating a client (client company)

As indicated before you can add clients (which are groups of users). This is practical if you wish to add a number of users who form a group (e.g. group of experts, project steering team) to a project, rather than having to add them one by one.

To create a new client group you need to go to Administration and click on Add Client
You then get this screen:

Enter the name of the client group. You can also enter an email address for the group as well as homepage, phone and address information. These information are not compulsory.
3.5 Creating a user (employee of client company)

From the Administration menu (below) click on Clients

To add a user click on Add User.

Fill all information (fields marked with * are required)
4 Send mass mail

To send out a mass mail you need to access the Tools.

Now click on Mass mailer

Enter the subject and the message body.

You can now select an entire group (owner company and/or client companies) or you can select individual users in these groups. Note that the message sent by the mass mailer will not be saved in the project.