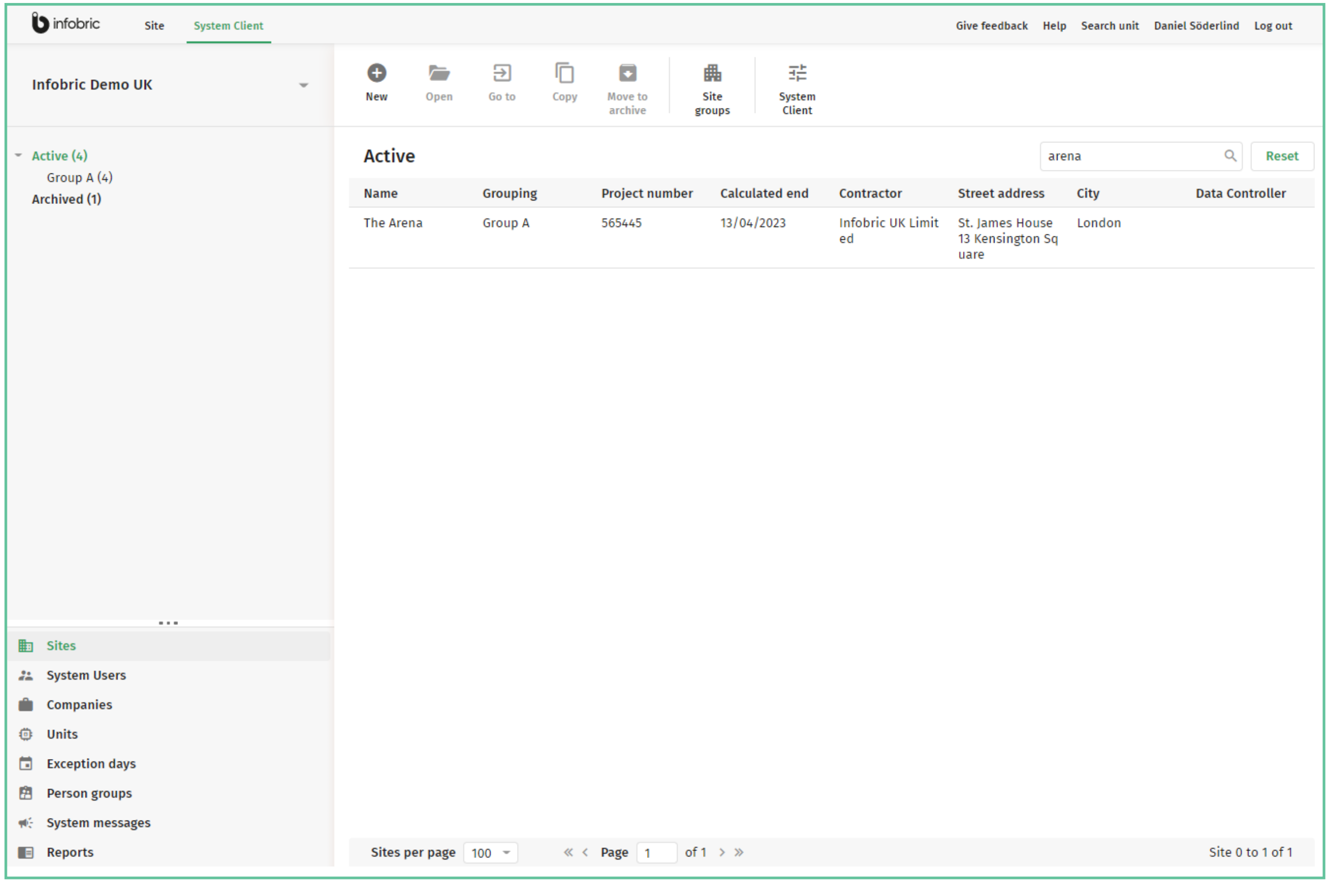
Infobric Ease Quick Guide - System administrator

This quick guide is meant to give you a brief look at the most common tasks performed by system administrators.

Overview of Infobric Ease for System administrators

Signing in to Infobric Ease

1. Open your web browser and go to https://ease.infobric.co.uk
2. Sign in with your username and password
3. Click on **System client** at the top left.
4. In the top left corner you will see what system client your are currently working with. If you have access to several system clients, you can switch between them by clicking on the arrow below the system client name.

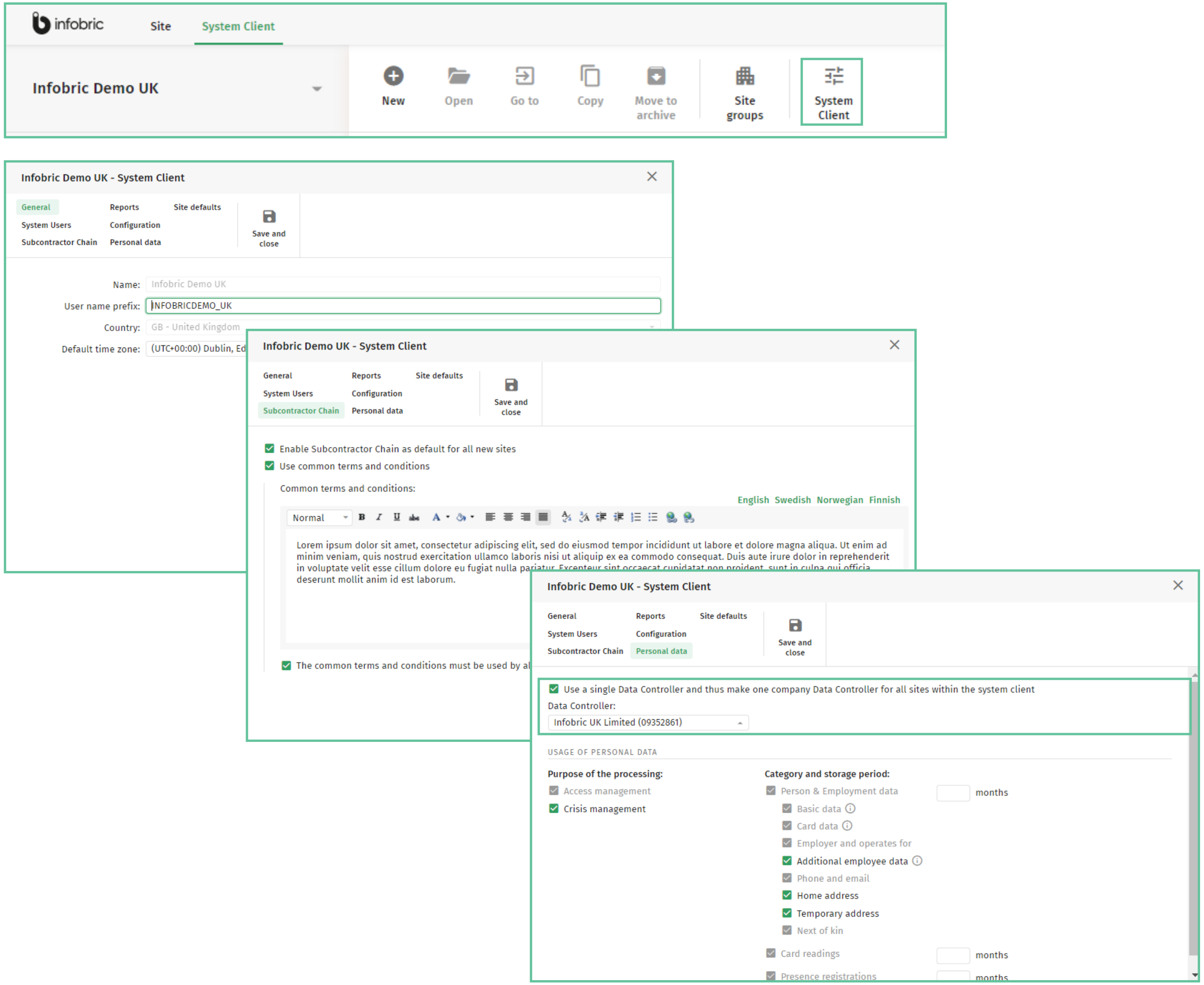


Settings system client

Click on **System Client** up at the far right. Run through the different settings according to the steps below:

1. Check General settings.
2. Activate the **Subcontractor chain** if needed and choose if certain terms and conditions should apply for the companies in the chain.
3. Make settings for handling **Personal data** by choosing single data controller by ticking the checkbox. By doing this and choosing a company from the drop-down menu you will make one company responsible for the personal data on all sites on the system client.

NOTE! If you do not want to choose single data controller the default setting with joint data responsibility will remain. This means that several companies within the system clients shares the responsibility for the personal data, and it is up to the Site administrator of each site to specify data controller.



Using and storing personal data

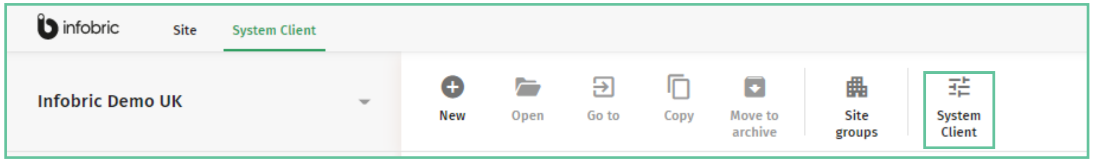
In the section **Usage of personal data** a number of checkboxes are shown. These can be used to activate/deactivate specific personal data categories. Data storage period can be specified for each category. Those categories that are
deactivated will be deleted.

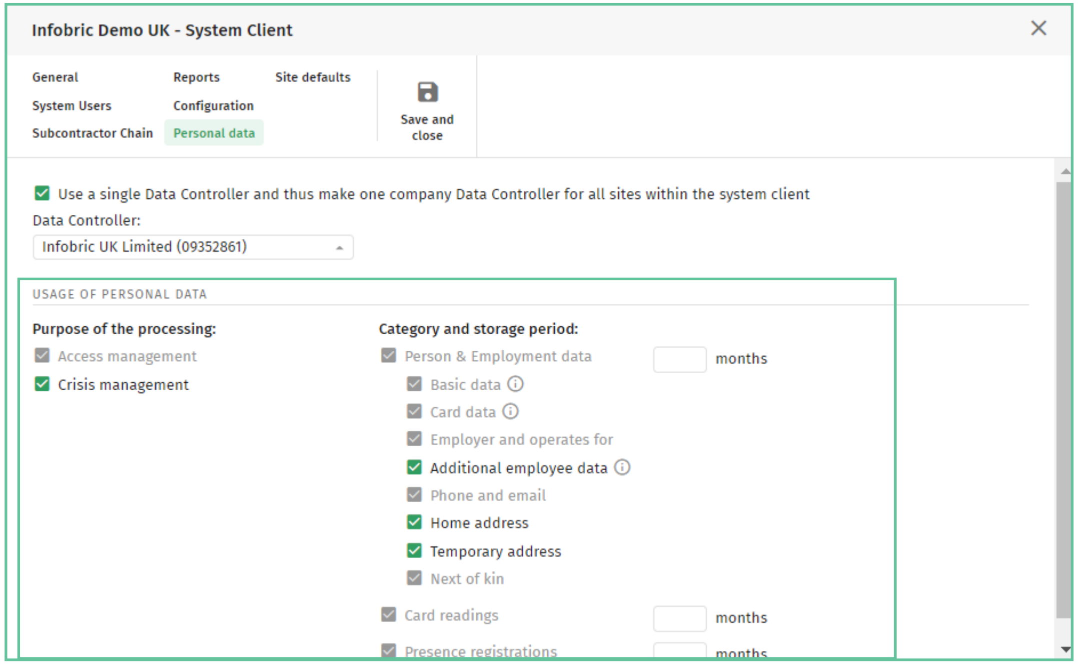
This is how you set storing routines for your system client:

1. Choose **System Client** in the top menu.
2. In the **View** section click the alternative **Personal data**.
3. In the following dialogue you can specify the purpose of processing personal data, what categories should remain activated, and for how long the personal data should be stored.

NOTE! At the end of the specified time period, all data older than that will be deleted automatically. If time period is not specified, no deletion of data is performed.

TIP! To the left you can specify the purpose of your personal data processing, and thus get a suggested list of what categories should be included. Further categories can then be added if needed.





Manage companies

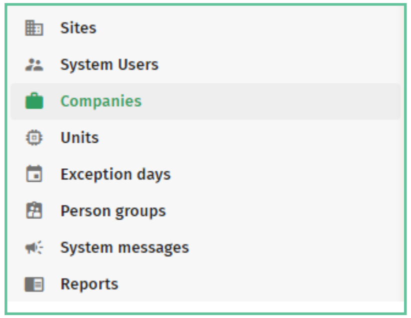
In the main menu section **Companies** you can manage the companies that are present on the system client, and add new companies if neccessary when creating a new site.

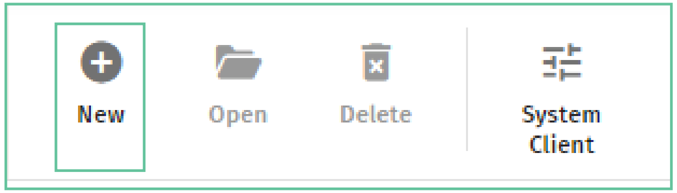
This is how you add a new company:

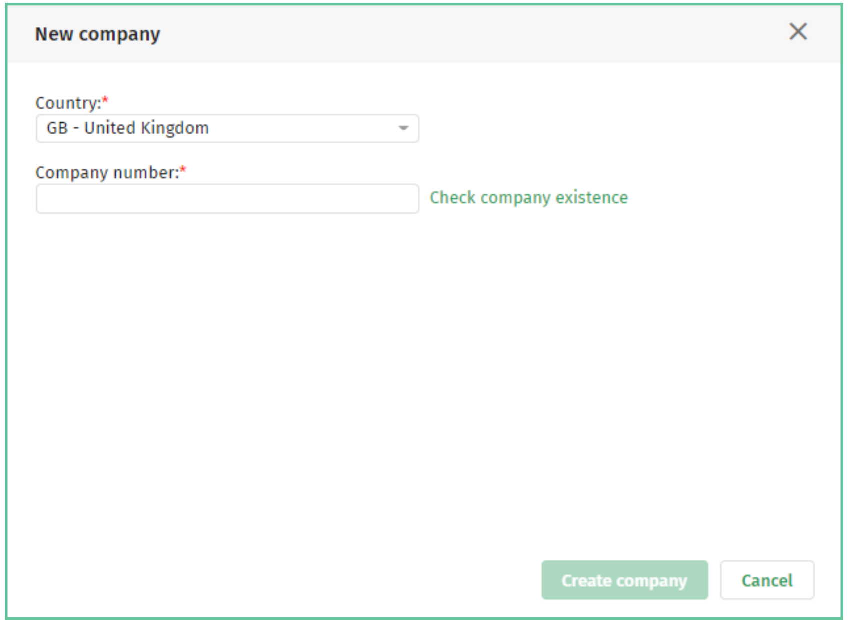
1. Choose main menu alternative **Companies** in the bottom left corner.
2. In the **Company** section in the top meny, click **New**.
3. Specify **Country** and **VAT number**.
4. Click **Check company existence.** If the company exists you can then click **Create company.**
5. Fill in the company name.
6. Choose what permissions the company should have on the system client. There are three different permissions on a company level: **May have sites, Cannot be blocked and Can be Data controller.**
7. Click **Create company** to finish. The company is now created and added to your system client.

NOTE! If you choose for the company to be Data controller it will be selectable as Data controller when using joint responsibility for personal data on the system client.

NOTE! You can assign these persmission on already existing companies as well. Click the company in the list, and use the checkboxes to assign appropriate permissions.

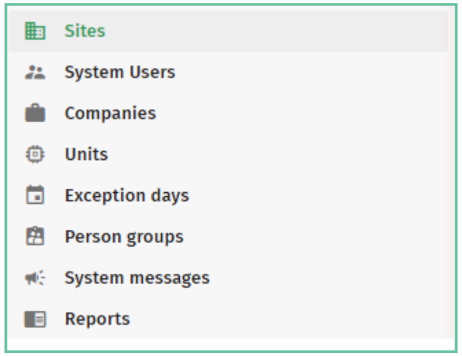


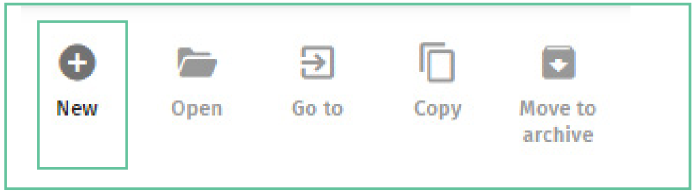


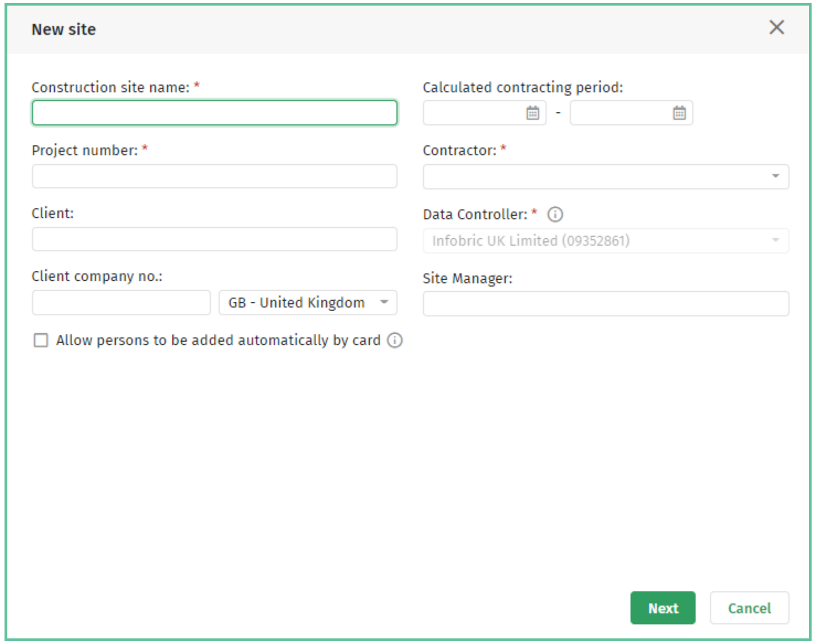


Create new site

1. Choose main menu alternative **Sites** in the bottom left corner.
2. Click **New** in the top left menu.
3. Input all neccessary information about the site.
4. Click **Create site.**
5. If you want to activate the Ease CheckIn app for the site you do this here.
6. Complete the rest of the information about the site.
7. Add Site administrators and Configurators as a final step.
8. Then click **Create site** to finish and get started working with your site.







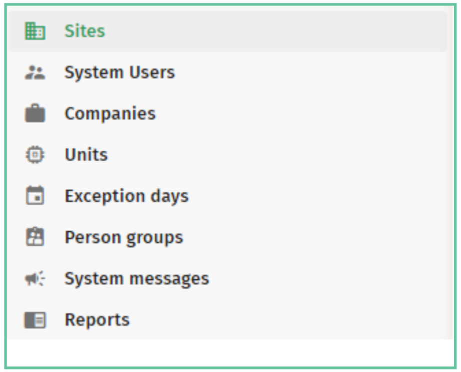
NOTE! A **Site administrator** is a person who manages the system on the site. For instance a Site manager.

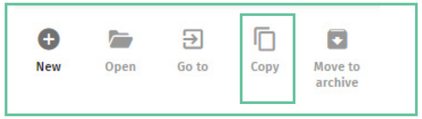
NOTE! A **Configurator** is a person who adds and removes units on the site. For instance an installer.

Copy site

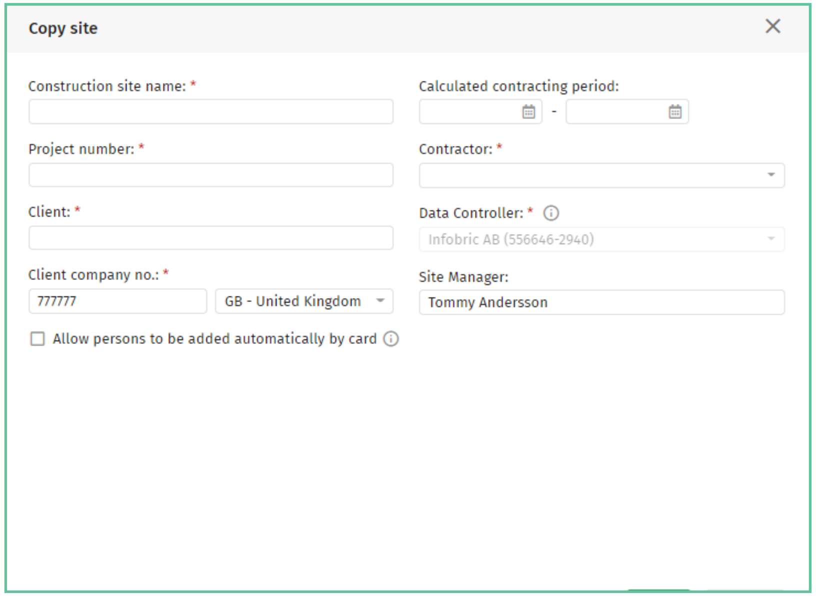
If you have a new site with similar settings as an old
one, or a new section of an existing site, you can copy
an old site to speed up administration.

1. Choose main menu alternative **Sites** in the bottom left corner.
2. Highligt the site you want to copy by clicking on it in the list to the right.
3. Click **Copy** in the top menu.





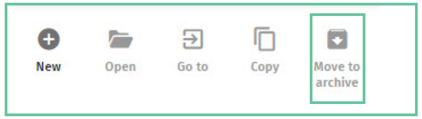
1. Input all neccessary information about the site.
2. Choose which site administrators and configurators should have access to the site.
3. Choose content and units to be copied to the new site.



Archive site

1. Highlight the site and choose **Move to archive** in the top left menu.
2. Confirm by pressing **Yes.**

The site is now archived. All information concerning the site is saved on Infobric servers.



Generate report

If there are activated reports on the system client avaiable for Report administrators, these can be generated from the main menu alternative **Reports** down in the bottom left section of the
interface.

This is how you generate a report:

1. Choose main menu alternative **Reports** in the bottom left corner.
2. Choose what report you would like to generate.
3. Specify site for the report.
4. Specify time period.
5. If you want a complete report, leave the rest of the fields empty. Otherwise fill these in as well.
6. Chosse output format: **Show on screen**, **Excel** or **Excel 97-2003.**

NOTE! You can only generate one month at a time, so if you need a period longer than that, you need to generate several reports.

NOTE! Reports are available for both active and archived sites.

Contact info to other administrators

In those cases where other administrators on the system client, that has no system administrator permissions, need help with tasks related to this permission, your contact info will be shown, and the user in question is asked to contact you.