KONICA MINOLTA

Giving Shape to Ideas

FileAssist

Administrative Console Overview

cloud

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We recommend using either Google Chrome, Mozilla Firefox, or Internet Explorer 8, 9, 10, and 11; we also recommend using 1920 x 1024 screen resolution for the best display.
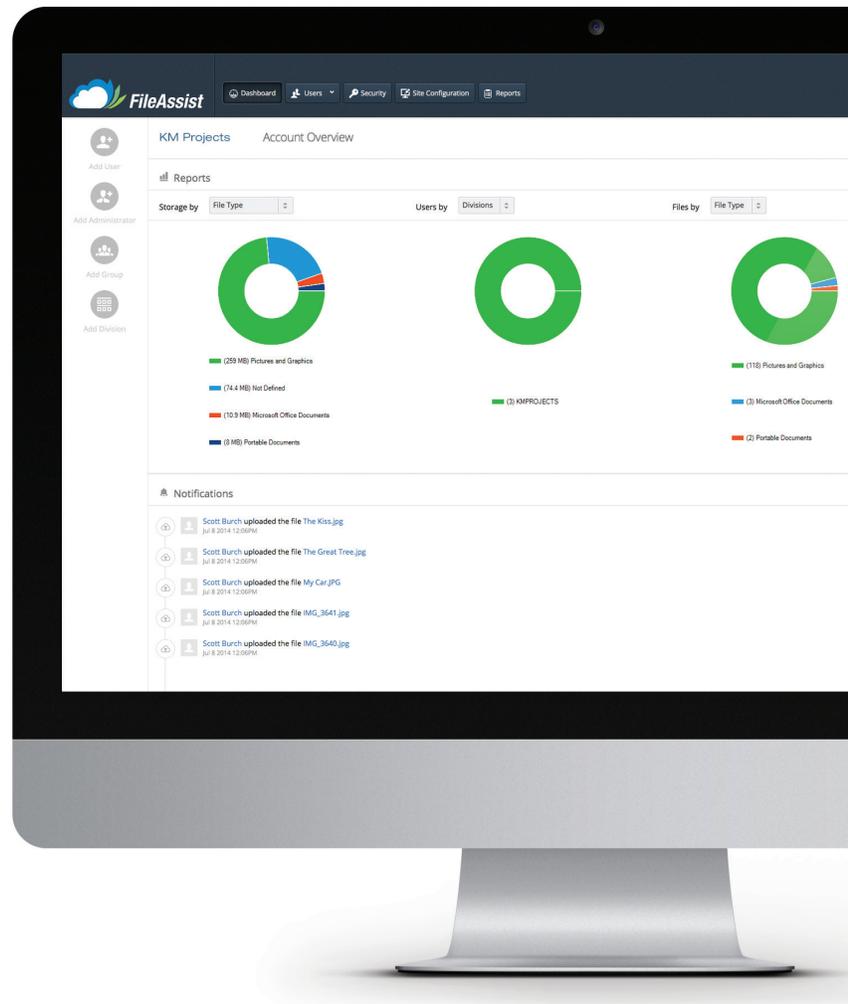
Accessing the Console

Enter your **Company Code, Admin User ID,** and **Password** to gain access to the **Administrator Console**—these are all provided via email.
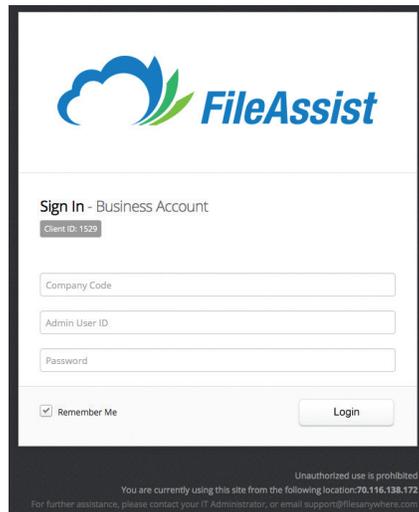
A. Quick Add: From the dashboard the administrator can quickly add a user, another administrator, a group, or a division.

B. Reporting: The drop down menus alter the statistics displayed in the donut graphs below the red box. The admin can view the storage being used, how the users are disseminated into their respective divisions or groups, and the files displayed by size, date, tag, file type, users, and extension.

C. Account Info: Displays how many user accounts are being used out of the total available amount and below it shows the used space out of the available amount.

D. Summary: This quick summary displays users, folders, files, groups, divisions, and other account information at a glance.

E. Notifications: Displays all actions across all accounts updating every 30 seconds.

F. Hyperlink: The account name is also a hyperlink to the user login portal.

G. Eyes: These buttons hide and unhide the categories.

Dashboard Overview

The **Administrator Console** is an efficient and powerful administrative tool. The new dashboard provides administrators with information about their account at a glance. The different sections of the dashboard have been boxed and labeled to break the information down to bite size chunks. Take a moment to look over the image below and then read the descriptions using the image as a reference.
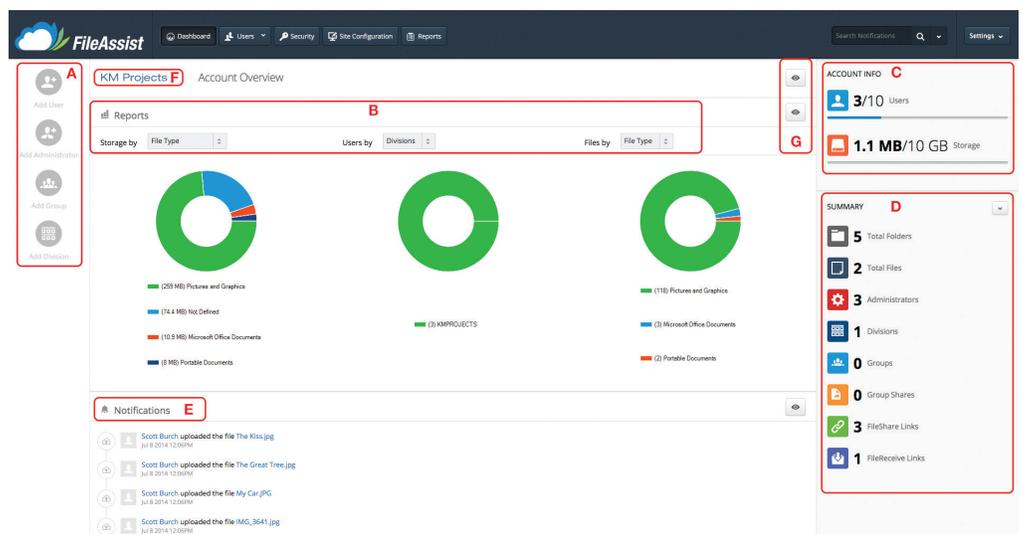
Add Division

Creating Divisions

What are Divisions and why would I use them? Once you have successfully logged into your **Administrator Console** you can create and edit users, divisions and groups. **Divisions** are a way of segregating users for easy search, classification, and prevention of shared data. They also allow Admins to specifically monitor predetermined **Divisions** rather than having one person overview all accounts.

Example: Sam in the Payroll Division can't share his info with Bob in the Support Division. Creating separate divisions allows the users to collaborate with coworkers in their department but keeps the data segregated.

Step 1

Click on **Add Divisions** to start the process of adding a new division to your account.

Follow the instructions below using the guide letters for more information.

A. Division Code: Typically an abbreviation of the Division Name.

B. Division Name: Name of the division (i.e. Marketing or Sales).

C. Maximum Users: Total number of users allowed in division.

D. Allotted Storage Space: Maximum allotted storage space for the division.

E. Share Permissions: If users are able to create GroupShares and with whom.

F. Sharing with All: Allows users to create GroupShares with individuals.

G. Sharing with Division: Allows users to create GroupShare™ with others in the division.

H. No Sharing: Disallows any GroupShares from being created by users in the division.

Add Division ✕

▦ Division Details 👤 Contact User 👤 Administrators

GENERAL INFORMATION

Division Code — **A**   Division Name — **B**

Description

ACCOUNT SETTINGS

Maximum Users — **C**   Allotted Storage Space (MB) — **D**

SHARE PERMISSIONS ⓘ **E**

Sharing with All — **F**   Sharing with Division — **G**   No Sharing — **H**

Cancel   ◄ Previous   Next ►   Save

Step 2

The **Contact User** is the main contact and head of the division. Fill out the **Contact Information** and then click **Administrators** to the right of the **Contact User** tab to continue.

Add Division ✕

▦ Division Details 👤 Contact User 👤 Administrators

CONTACT INFORMATION

Name   Last Name   Email

Mobile Number   Office Number

CONTACT LOCATION

City   Select a State (U.S. Only)

Zip Code   Country

Cancel   ◄ Previous   Next ►   Save
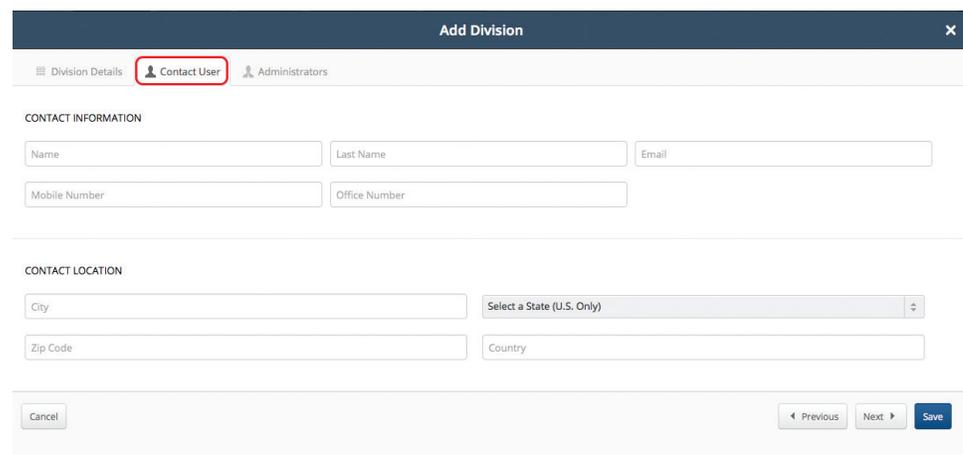
Step 3

A. Click to **Add Administrator to Division.**

B. Division **Administrators** will appear here.

C. Click **Save** to complete Division creation.

Add Division ✕

Division Details   Contact User   **Administrators**

Select administrators for this division:

| Search an Administrator | | Add Administrator to Division | A |

☐	**Administrators Name**	**Permission Role**	**Created On**
	No administrator found.	B	

Remove Selected

Cancel   ◀ Previous   **Save** C
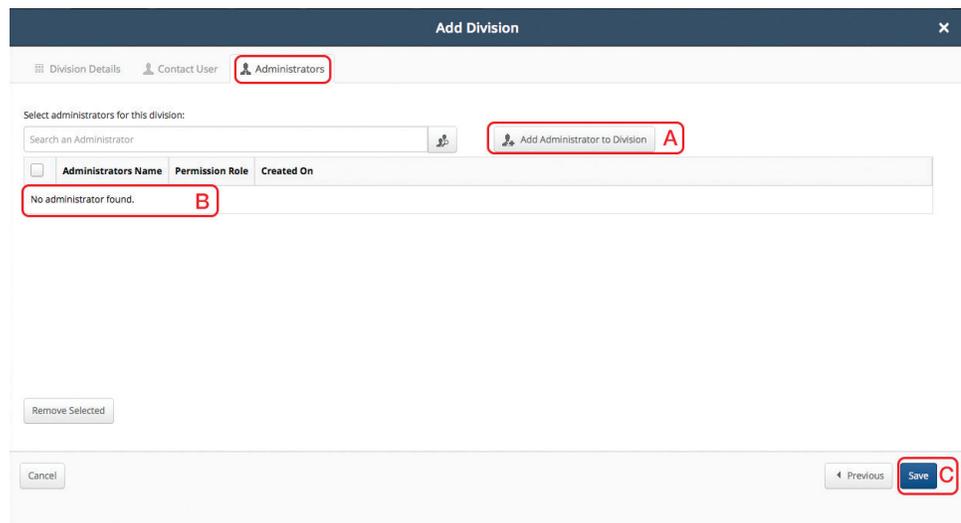
Creating Groups

What are Groups and why would I use them? A Group can designate certain sharing rights and privileges to any user within the group. If you add a new user, they will inherit the Group's rights and permissions, yet if you remove a user they will have the same rights and permissions removed.

Example: Steve is added to the Marketing Group and his account automatically has his shares and permissions setup. James moves from Support to Sales Group and his old setup is removed and the new setup is automatically created.

Step 1

Adding a New Group

Now we'll move on to Group creation. Click **Add Group** to continue. Starting with the **Group Details** enter a **Group Name** and assign the group to a division **(Select Division).**

Add Group ✕

Group Details   Sharing   Members

GROUP INFORMATION

| Group Name |

DIVISION

| Select Division ⬍ |

Cancel   Next ▶   Save
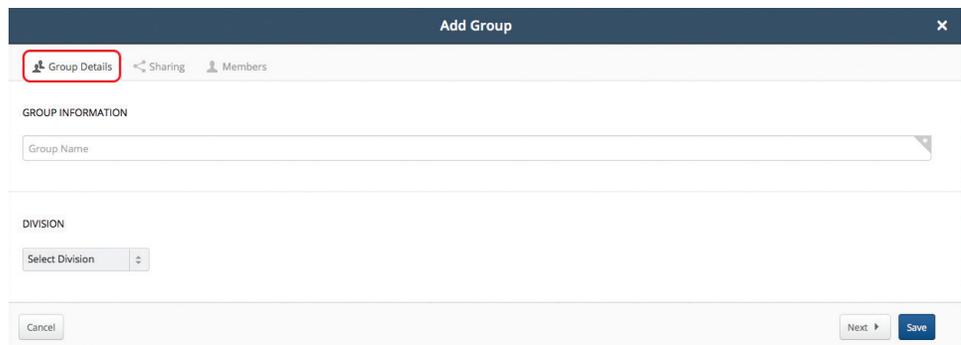
Step 2 The sharing section denotes what shared folders the group members can access.
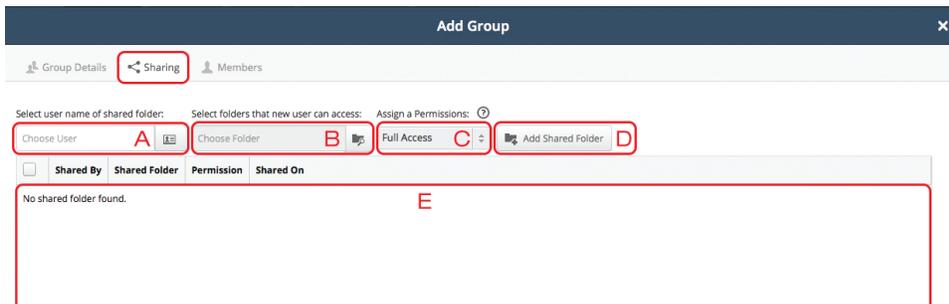
A. Choose User: Type in the user or select them using the button to the right of the field.

B. Choose Folder: Select that user's folder you want the group to access.

C. Assign a Permission: Select the permission type you want.

Read Only: Users may only download a read only version of document.

Full Access: Users are able to fully utilize all features of the account.

Create and Update: Users are only able to create new documents and update preexisting files.

Master Access: User has no restrictions.

D. Add Shared Folder: Click this button to Add the Shared Folder.

E. No Shared Folder Found: This section will display all folders that are being shared.

Step 3 Now you can add users to the group. Type in their **Username** or click the button to the right of the Choose User Owner field and then click **Add Member.** All of the group's users will appear below.
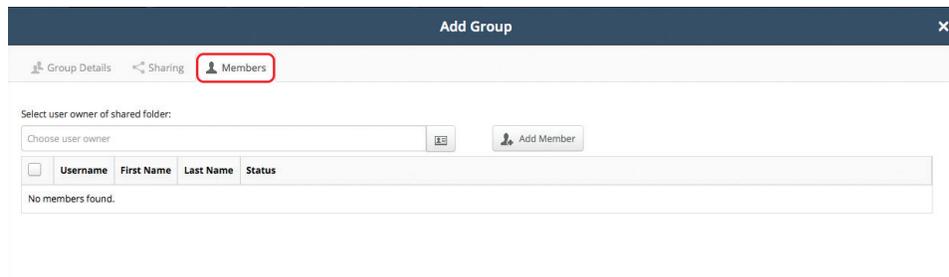
Creating Users

What is a User and why would I use it? Users are created for everyone that will use the service to store, share, and collaborate with others. Each of the users can be assigned specific folders and their permissions are unique to the user which allows a flexible and form fitting profile for each person.

Example: Sam has 2 GB of personal space and has **read only** access to Jamie's shared folder. Sam is able to view and download **read only** versions of the files, but is unable to upload or modify the files.

Adding a New User

Step 1 To begin the user creation process click the **Add User** button. The new user creation page will appear as below; follow the steps and use the pictures as a guide to complete the user creation. Under the **User Details** section fill out the user's Personal Information.
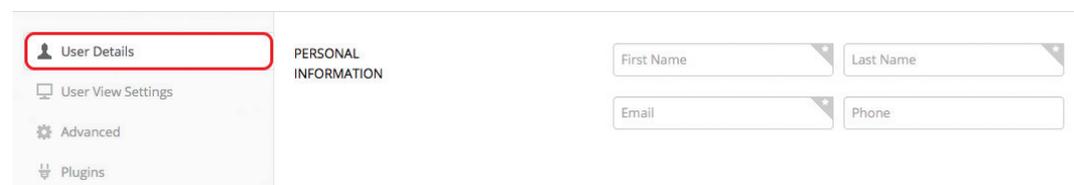
Step 2

Now enter a **Username** and **Password** for the account. Clicking the crossing arrows will generate a random password for this new user.

USERNAME
& PASSWORD

Username

| Password | | Confirm Password | | ⤫ |

☐ Do not send password ⓘ   ☐ Do not email details to user   ☑ User must change password on next login

Step 3

Select the **Division** and then assign **Personal Storage Space** if desired.

DIVISION

| KMPROJECTS | ⇕ |

STORAGE SPACE

☐ Assign Personal Space

Step 4

This section is used to assign shared folders to the new user. Choose the user, select the folder of theirs you would like to share with the new user, select a permission, and click **Add Shared Folder.**

FOLDER SHARING

Select user name of shared folder: Select folders that new user can access: Assign a Permissions: ⓘ

| Choose User | ▤ | | Choose Folder | 📁 | | Full Access | ⇕ | | ▥ Add Shared Folder |

☐	Shared By	Shared Folder	Permission	Shared On

No shared folder found.

Remove Selected

Step 5

Use this section to add the new user to a **Group.**

SELECT GROUP

| Search Group | 🏃 | | ＋ Add Group |

☐	Group Name	Members	Shared Folders

No Groups found.

Remove Selected

Step 6

Add any notes regarding this user in the **Notes** section.

NOTES

Notes

Step 7

Under the **User View Settings** the admin is able to set the visual settings of the user account like the default **Interface Setting, Interface Option,** and **Time & Language.**

The recommended selections for the **Interface Setting** are labeled **(A) New** and **(B) Tree View.** The **Interface Option** and **Time & Language** can be changed per preference, though the user will be most impacted by the top two recommended selections.
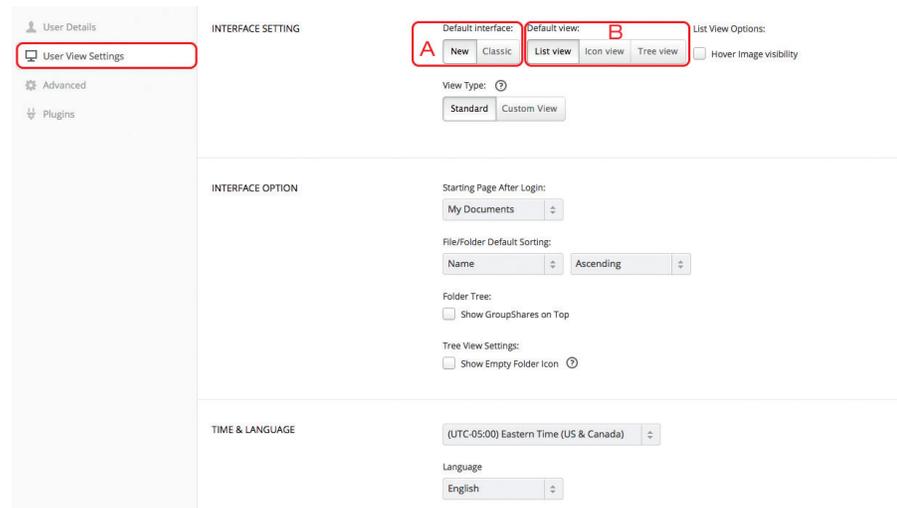
Step 8

The **Advanced** settings are **(A)** recommended left unchecked and **(B)** checked. **Note: WebDAV Access** and **FTP/SFTP** will not register in the history tracker, so if you want to see every action across all accounts do not enable either **WebDAV** or **FTP/SFTP.**
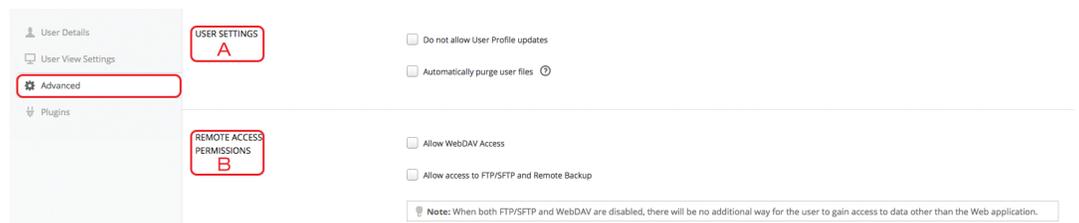
Step 9

The **Plugins** section is where the Administrator can **(A)** enable and disable Service Plugins and **(B)** make modifications to the plugin itself.

Now you're done creating the user. Repeat this process until all the users are created (and customized if necessary).

Quick Tip: Using the search bar will alter the infographs—Administrators can type in a **Username** and all of the infographs will reflect information regarding that specific user.
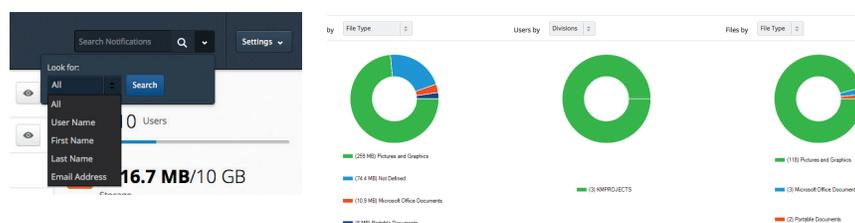
Add Administrator

Creating Administrators

What is an Administrator and why would I need one? You can create additional Administrators that can manage the entire account or pre-selected Divisions, allowing you more time to complete other tasks.

Example: Richard is the account's **Administrator** and is able to set permission levels for all users and new **Administrators.** Each additional **Sub-Administrator** is created with customized permission levels; Peter is an **Administrator** for the Marketing Division and is only able to add, edit, and delete user accounts.

How to Add an Administrator

Click **Add Administrator** to create the **Administrator.** The first page will ask for the contact information, their **Username,** and a **Password.**

The Permissions and Divisions tab offer more customizability, however these advanced features are addressed in our Knowledge Base articles.

Security

The Security page allows the Administrator to manage password requirements, Username requirements, login attempts, and **FileShare™** settings.
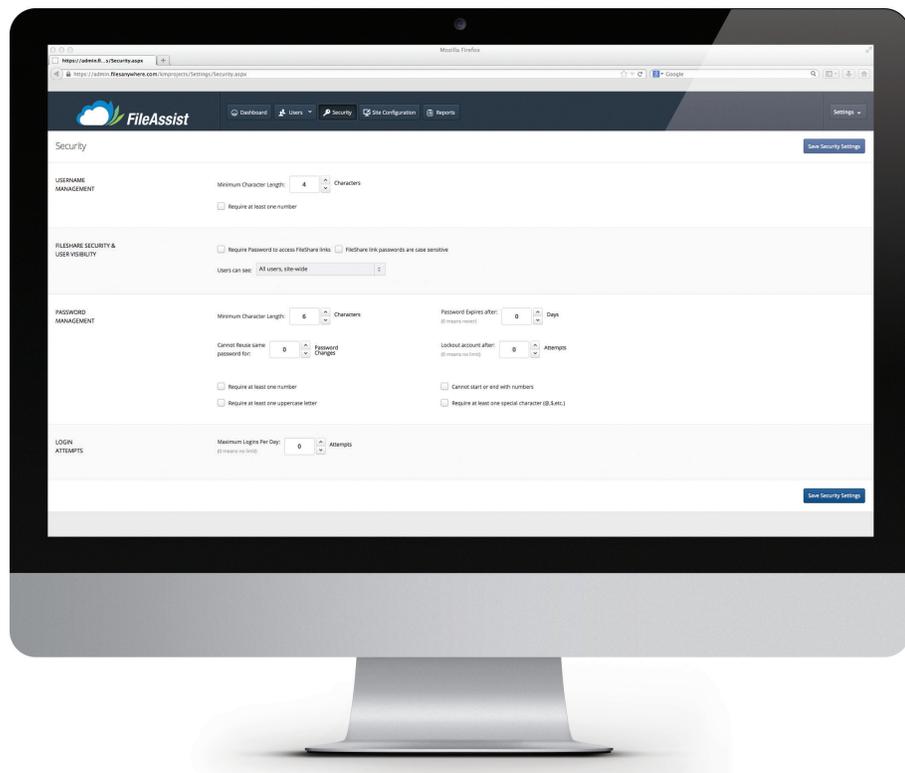
Site Configuration

Similar to the Security page, **Site Configuration** contains settings that affect all users.

These global settings allow the **Administrator** to optimize the default settings (i.e. sharing, display, plugins) for the users to better suit their and the company's requirements. Be aware that the **Site Configuration** affects all new users; new users will inherit all permissions denoted in this section.

This quick introduction does not cover every aspect or feature of the new and improved Administration Console, but it should get you started. If you have any questions or need something explained you can always contact our U.S. based support line at 1(800)-456-5664 (prompt 1, 3).

For complete information on Konica Minolta's FileAssist solution please visit:
www.file-assist.com

KONICA MINOLTA