

Admin Guide

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Users

Superuser

The superuser is the first account that is automatically created at FileRun installation. Its default username is "admin".

Along the administrative tasks the other admin users can do, he is the only user that can:

1. Change the system's configuration.
2. Install software updates.
3. Install license upgrades.

The superuser account cannot be deleted or deactivated. It can however be renamed.

It is highly recommended that you do not assign a role to the superuser account.

Admin users

Admin users can:

1. Manage user accounts, except their own and other admins' accounts.
2. Manage roles.
3. Manage user groups.
4. Manage e-mail notification settings.
5. Browse users' activity logs.
6. Manage metadata settings.

When configuring the admin's permissions, you can choose:

1. What administrative section is he allowed to access.
2. Which groups of users he can see and manage.
3. Whether he will be able to define the path of the users' home folder, or if he will be limited to a specified folder.

Independent admin users

Independent admin users can:

1. See and manage only user accounts, roles and groups created by themselves.
2. See and manage only his e-mail notification settings.
3. Browse his own users' activity logs.
4. Manage his own metadata settings.

When configuring the independent admin's permissions, you can choose:

1. How many user accounts he will be able to create.
2. Whether he will be able to define the path of the users' home folder, or if he will be limited to a specified folder. If you define a "Home folder template path" for the independent admin user, he will not have any home folder related options when adding a new user. If you leave the field blank, all the users he creates will have their home folders automatically created inside the admin's own home folder.

Also, an independent admin user is required to configure space and traffic quotas for the users he creates. He cannot assign more space and traffic than it was assigned for its own account.

Adding a user

To create a new user account follow these steps:

1. Open the control panel.
2. Select "Users".
3. Click "Create new".
4. Fill in the form:
5. Required fields:
 - o Username
 - o Name
 - o Home folder
6. Click "Submit" to create the user with the specified options.

Click the "[Check path]" link next to the "Home folder" field, to make sure the path you've set for him points to an existing folder. If it doesn't, the user will see an error message after logging in.

Please use only forward slashes (/) when setting up paths, even if you are running a Microsoft Windows server.

If you are not sure how the path should look like, look at your own home folder path which is displayed on the form, inside the read-only field "*Your personal home folder is*".

Editing a user

To edit a user account follow these steps:

1. Open the control panel.
2. Select "Users".
3. Select the user you want to edit.
4. Click "Edit user"
5. Make the appropriate changes in the form.
6. Click "Submit" to save the changes.

Deleting a user

To delete a user account follow these steps:

1. Open the control panel.
2. Select "Users".
3. Select the user you want to remove.
4. Click "Delete user".
5. Click "Delete" to confirm the user's deletion.

Deleting a FileRun user account does not remove the user's home folder or its activity log entries.

What gets deleted:

- his "Deleted files" folder
- the WebLinks he created
- the folder sharing information

Deactivating a user

To deactivate a user account follow these steps:

1. Open the control panel.
2. Select "Users".
3. Select the user you want to deactivate.
4. Click "Deactivate user account".

Following these steps again it will reactivate the user account. This can be used to temporary disable one user's access to FileRun.

Groups

Groups can be used for:

1. Sharing a folder with multiple users at the same time. (You can also configure a user permissions so that it can only share folders with certain groups of users.)
2. Configuring e-mail notifications: adding notification rules involving multiple users at the same time.
3. Setting up admin users that can manage only certain groups of users.

Adding a group

To create a new group follow these steps:

1. Open the control panel.

2. Select "Groups".
3. Click "Create new".
4. Fill in they form:
5. Required field:
 - o Group name
6. Click "Submit" to create the group with the specified details.

Adding or removing users from groups

To add or remove a user from a group follow these steps:

1. Open the control panel.
2. Select "Users".
3. Select the user you want to add to a group or remove from one.
4. Click "Edit user"
5. Using the "*User group(s)*" field, select only the groups that you want the user to be part of.
6. Click "Submit" to save the changes.

Renaming a group

To change a group's name follow these steps:

1. Open the control panel.
2. Select "Groups".
3. Select the group that you want to rename
4. Click "Edit group"
5. Make the appropriate changes in the form.
6. Click "Save" to save the changes.

Deleting a group

To delete a group follow these steps:

1. Open the control panel.
2. Select "Groups".
3. Select the group you want to remove.
4. Click "Delete group".
5. Click "Delete" to confirm the group's deletion.

Deleting a group **does not** delete the users contained.

Roles

Roles can be used to easily apply sets of permissions to multiple users at the same time.

If you select a role for a user, you will no longer be able to set individual permissions and settings for that user.

Adding a role

To create a new role follow these steps:

1. Open the control panel.
2. Select "Roles".
3. Click "Create new".
4. Fill in the form:
5. Required fields:
 - Role name
6. Click "Submit" to create the role with the specified details.

Editing a role

To edit a role follow these steps:

1. Open the control panel.
2. Select "Roles".
3. Select the role you want to edit.
4. Click "Edit role"
5. Make the appropriate changes in the form.
6. Click "Submit" to save the changes.

Deleting a role

To delete a role follow these steps:

1. Open the control panel.
2. Select "Roles".
3. Select the role you want to remove.
4. Click "Delete role".
5. Click "Delete" to confirm the role's deletion.

Deleting a role will not delete any user account.

Metadata

Metadata is information that a file can have attached to it. You can attach information like: comments, title, author, tags, etc.

By default FileRun provides ways of attaching comments to files using the "Comment" contextual menu option. For any other type of metadata you need to use the "Metadata" contextual menu option.

Metadata information is stored in "metadata fields". You manage the fields from inside the "Control Panel » System configuration » Metadata" administrative section.

When setting up a metadata field, you can define a list of options. The user will be presented with the predefined list to choose from. If you do not define a list of values, the user will be free to type in any value he wishes.

Every metadata field needs to be part of a "metadata fieldset". Fieldsets can be used to group more fields.

To display certain fieldsets for certain files, you define "metadata filetypes". You can choose for each filetype what fieldsets to be displayed. By defining a fieldset as "generic", its fields will be automatically displayed inside the metadata window, no matter what "file type" the user selects for the file.

Metadata information can be displayed in the list of files as new columns, by clicking the arrow icon that appears while holding the cursor over a column's header and selecting the metadata fields from the list of possible columns.

Metadata fields, fieldsets and filetypes created by independent admin user are available only to these users and the user accounts he creates.

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