CEO ADVISOR: Client Administration

Client Administrator Manual

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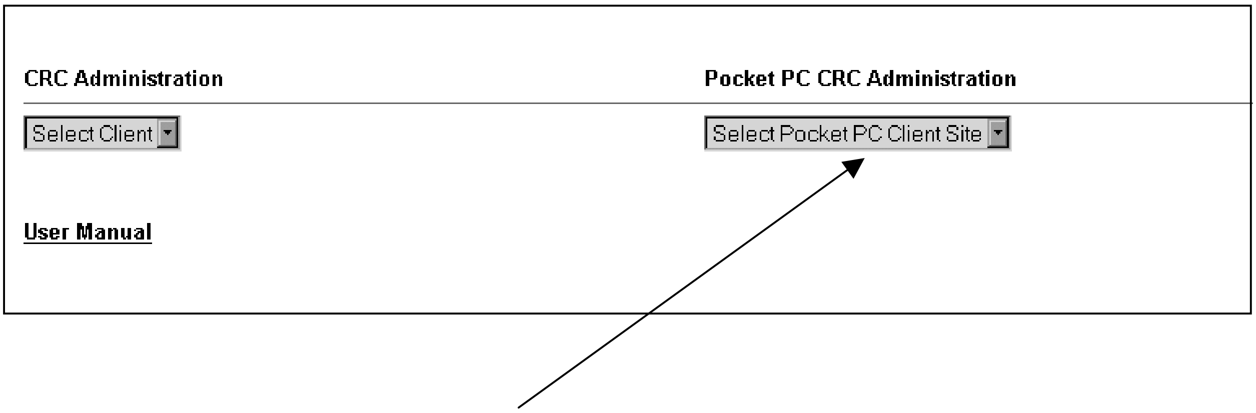
CEO Advisor Client Administration

Site Administration Main Page

Introduction

- The **CRC Administrator** page is displayed after you login as a **Client Administrator.**
- Before going any further, the Client Administrator should select a CEO Advisor site to work with (Pocket PC Client Site).
- The Super Administrator assigns the access-rights for each CEO Advisor site to Client Administrators.
- Please note, this document only discusses the CEO functions when logged on as a client administrator. Please refer to the AP Web Client Administration document for CRC functions.
- An example of the **CRC Administration** page is displayed below:



Choose a CEO Advisor site to work on

Client Administration Details

Introduction

- The Super Administrator establishes the original CEO Advisor site. Then Client Administrators use this page (see below) to edit the CEO Advisor information.
- After selecting a CEO Advisor site to work on, the **Client Administration** page will appear. This pages acts as the main administration.
- From this page you are able to:
- Edit the client's details.
- Add/edit portfolio items.
- Add/edit client user group.
- Add/edit client users.
- View/edit client users/group access.
- View/edit client portfolio/group access.
- Change password details
- An example of the main **Client Adminstration** page is displayed below:

CRC Details Administration

Edit Client Details

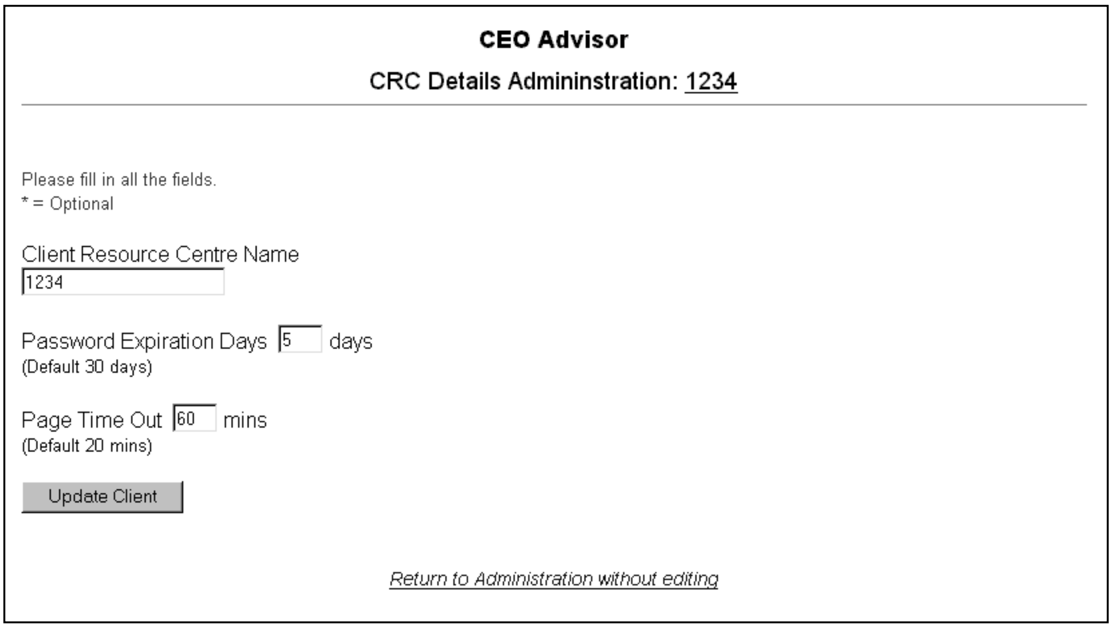
1. From the Client Administration page, click the **Edit Client Details** link.

   Result: The **CRC Details Administration** page will appear. This displays the existing client administration details.

2. Edit the Client Resource Centre Name if required.
3. Reselect the Client image details if required.
4. Reset the Password Expiration Days if required *(Optional – overwrites Country default)*.
5. Reset the Page Time Out minutes if required *(Optional – overwrites Country default)*.
6. Click the **Update Client** button to update changes or select **Return to Administration without editing** to return to the main administration page.

   Note: Only Super Administrators can delete a client.

- An example of the **CRC Details Administration** page is displayed below:



Client Portfolio Administration

Introduction

- The **Client Portfolio Administration** page contains the main content of the CEO Advisor website.
- Portfolio items can be PowerPoint presentations, Word documents, Excel spreadsheets, text files and image files. Typically, the Client Administrator converts PowerPoint .ppt files to Pocket PC- .cpt files first. The .cpt files are then used to upload to the server for viewing by the end user.

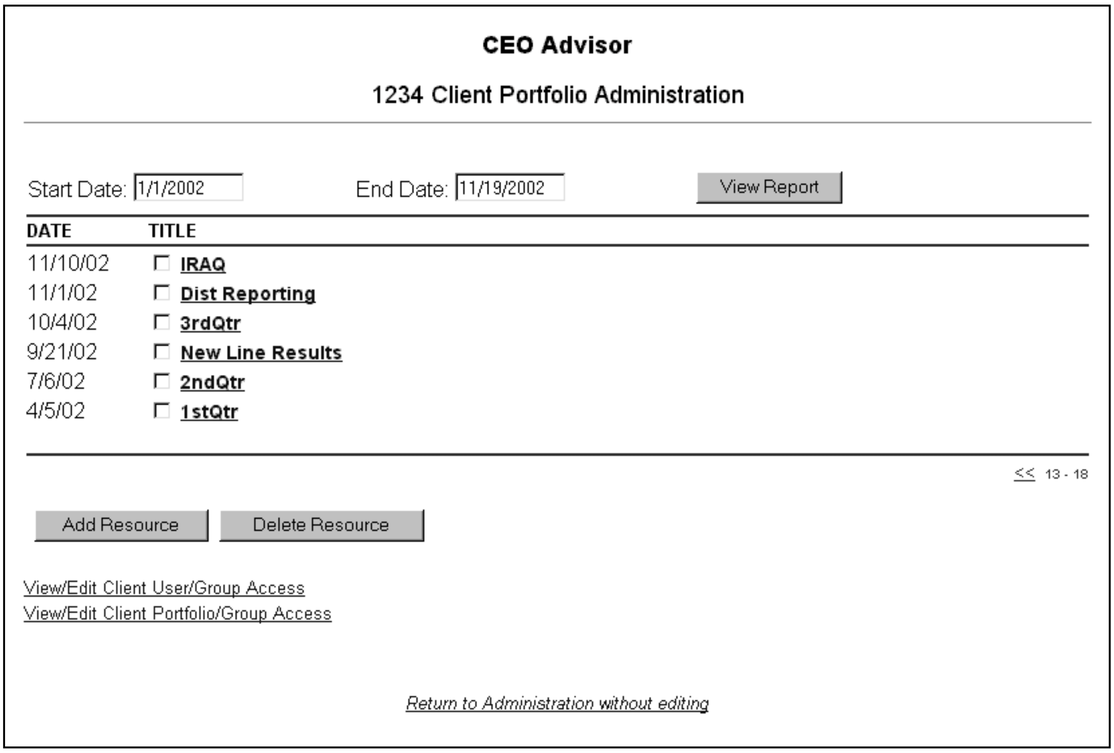
View reports

1. Click the **Add/Edit Portfolio Item** link from the **Client Administration** page.
2. Enter the start and end date in *mmddyy* format.
3. Click the **View Report** button

   Result: The report titles within the specified period range will be displayed alongside their dates, as shown in the example below.

Note: If there are more than six reports to view, select the **>>** (Next) link to see the next reports.

- An example of the **Client Portfolio Administration** page is displayed below:



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Client Portfolio Administration, Continued

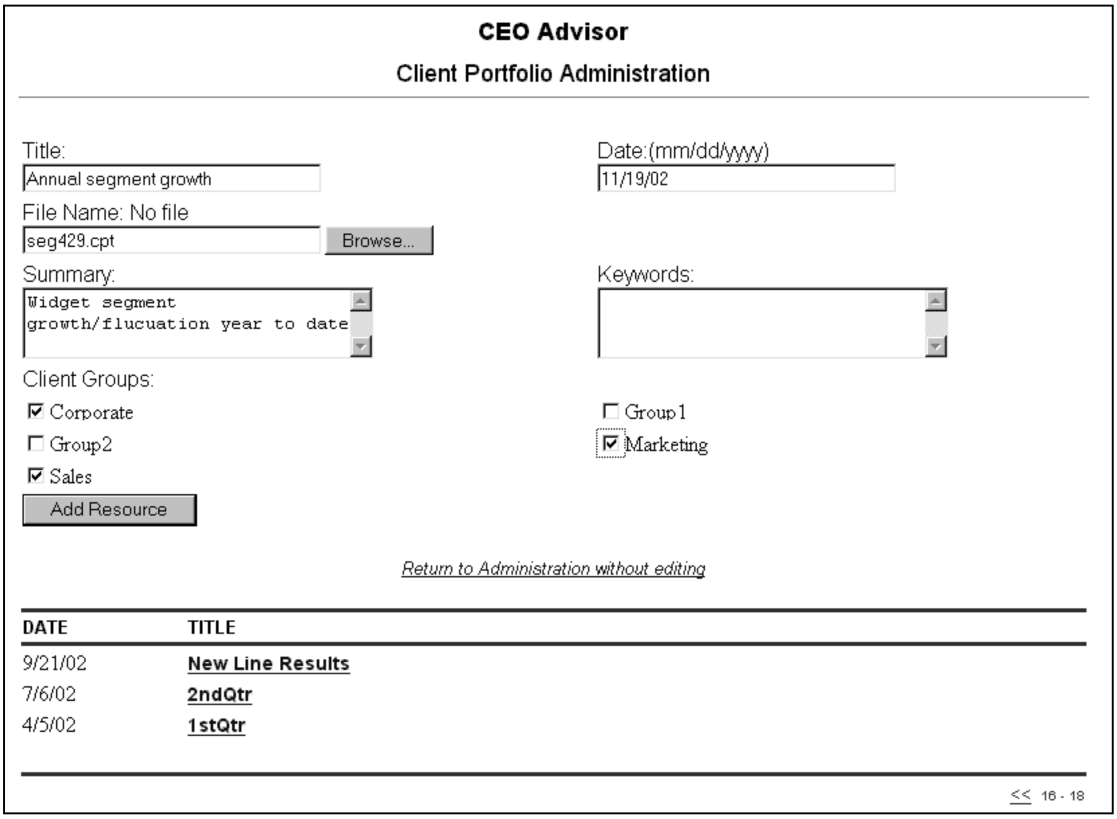
Add Portfolio Item

1. Click the **Add/Edit Portfolio Item** link from the **Client Administration** page.
2. Click the **Add Resource** button
3. Enter the Title and the creation Date (in *mmddyy* format).
   The current date is entered by default.
4. Enter the File Name or click **Browse** to locate the file.

   Note: To view PowerPoint files on the Pocket PC, PowerPoint files must be converted to a .cpt file first. Please refer to the **Appendix** for information on how to convert files from .ppt to .cpt.
5. Write a summary of this topic to guide others getting into the CEO Advisor site.
6. Enter the keywords that can be used for searching *(Optional)*.
7. Select the Client Groups who can access this topic.
8. Click **Add Resource** when done.

   Result: The new topic will be added to the list of existing topics.

- An example of adding a new item in the **Client Portfolio Administration** page is displayed below:



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Client Portfolio Administration, Continued

Edit/Delete Portfolio Item

1. Click the **Add/Edit Portfolio Item** link from the **Client Administration** page.
2. Select the **Topic** you want to edit/delete from the list of existing topics.

   Result: You will be presented with the Topic's information.
3. You have three options:
   - To update the portfolio item:
     - Modify the item's detail then click the **Update Restouce** button.
   - To overwrite an existing portfolio item:
     - Enter the File Name or click **Browse** to locate the file that contains the new changes, then click the **Update Restouce** button.
   - To delete the portfolio item:
     - Click the **Delete Resource** button

       Note: If you delete, you will get a message prompt confirming if you want to delete this item.

- An example of editing an item in the **Client Portfolio Administration** page is displayed below:

Client Group Administration

Introduction

- Client Administrators use the **Client Group Administration** page to add and/or edit the Client Groups according to the client user's need.
- Client Groups are used to control what individual users can see in the CEO Advisor portfolio.
- The maximum number of Client Groups is 40.

Add Client Groups

1. Choose **Add New Group** from the **Add/Edit Client User Groups** drop-down list on the main administraion page.

   Result: You will be presented with a blank form.
2. Enter a new **Group Name.**
3. Enter a **Description** for the new group (*Optional*).
4. Click the **Add Group** button.

   Result: A message will appear in the same screen, stating that the new group has been updated.

- An example of adding a new group in the **Client Group Administration** page is displayed below:

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Client Group Administration, Continued

Edit / Delete Client Groups

Note: To delete a Client Group the User access and Portfolio access must be removed first.

1. Choose the group name you want to edit/delete from the **Add/Edit Client User Groups** drop-down list on the **Client Administraion** page.

   Result: You will be presented with the group's information.

2. You have two options:

   - To update the Client User Group:
     - Modify the details for the group, then click the **Update Group** button.
   - To delete the Client User Group:
     - Click the **Delete Group** button.

       Note: If you delete, you will get a message prompt confirming if you want to delete this group.

- An example of editing a group in the **Client Group Administration** page is displayed below:

Client User Administration

Introduction

- A Client User is an individual who is authorised with access-rights to view CEO Advisor information.
- The Client Administrator must first set up the Client Users and assign them to the necessary Client Groups.
- A Client User may then access the CEO Advisor using the login area on the ACNielsen web site home page.

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Client User Administration, Continued

Add Client Users

Choose **Add New User** from the **Add/Edit Client User** drop-down list on the **Client Administration** page.

1. Enter the User Login name (up to 30 characters - email addresses are valid as a login name).
2. Enter the User Password into the User Password box.

   Note: The password must be at least 8 characters long and include alphabetical and numeric characters.
3. Enter the same password again into the **Confirm Password** text box.
4. Redefine the Password Expiration Days if the default is not suitable.
5. Redefine the Page Time Out minutes if the default is not suitable.
6. Choose a Login Validation type. You have two options:
   - A check will be made on User Name and Password
   - A check will be made on User Name, Password and IP Address
   - Note: If option 2 is selected, enter the IP address.

   When defining a Partial IP addresses please note:
     - The IP address requires input in field directly below this option.
     - An IP address can be a Full or Partial match.
     - When defining a Partial IP address only th e far most right digits may be removed.
     - A Partial IP address must conform to one of the following formats and cannot be empty.
       - ddd - will match the left most 3 digits
       - ddd.ddd - will match the left most 6 digits
       - ddd.ddd.ddd - will match the left most 9 digits
         Where d must be a single digit between 0-9

7. Select the Client Groups that this user should belong to.
8. Click the **Add User** button to update details

   Results:

- If the password is correctl a message will appear stating the details have been updated, and a new blank form appears allowing you to add a new user.

  Note:
- The **Disable Account** check box will deactivate the Client User's account, if selected.

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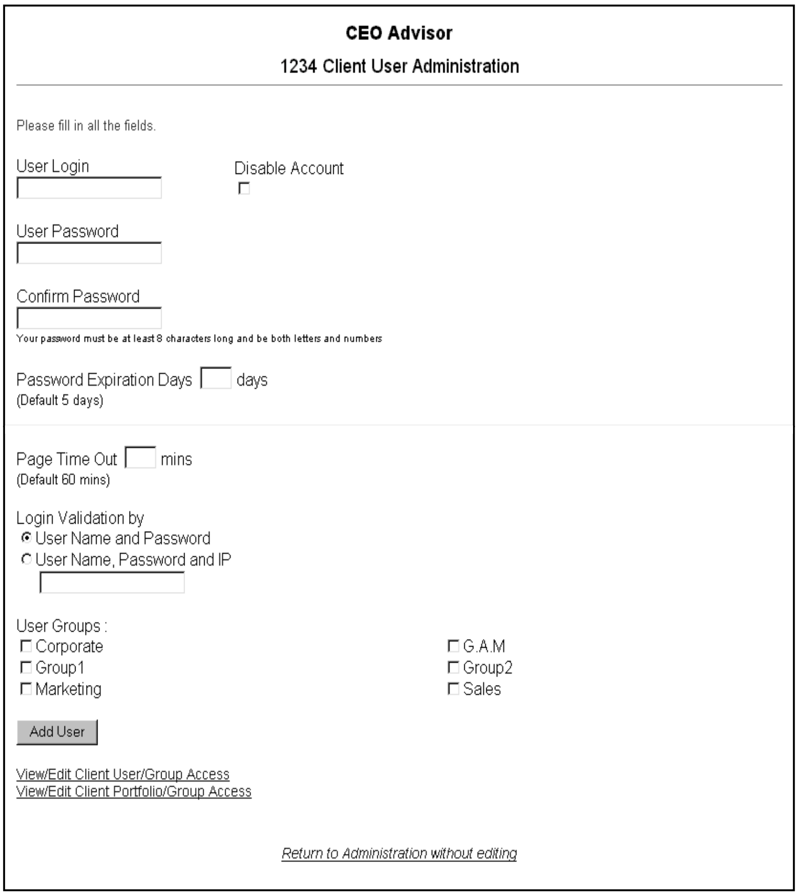
Client User Administration, Continued

- An example of adding a new client user in the **Client User Administration** page is displayed below:



CEO Advisor

1234 Client User Administration

Please fill in all the fields.

User Login

Disable Account

User Password

Confirm Password

Your password must be at least 8 characters long and be both letters and numbers

Password Expiration Days days
(Default 5 days)

Page Time Out mins
(Default 60 mins)

Login Validation by
User Name and Password
User Name, Password and IP

User Groups :
Corporate
Group1
Marketing
G.A.M
Group2
Sales

Add User

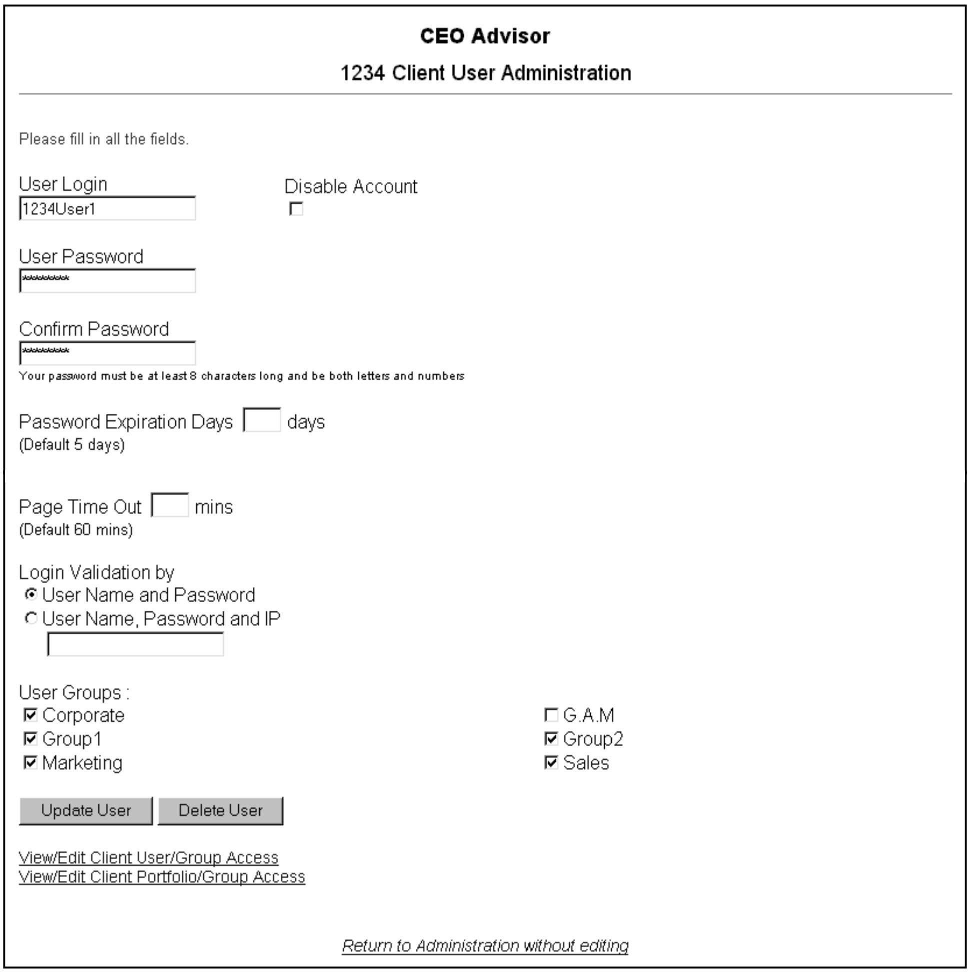
View/Edit Client User/Group Access
View/Edit Client Portfolio/Group Access

Return to Administration without editing

Edit / Delete Client Users

1. Choose the user name you want to edit/delete from the **Add/Edit Client Users** drop-down list on the **Client Administration** page. This page (above) will appear.
2. You have two options:
    - To update the client user:
        - Modify the user's detail then click the **Update User** button.
    - To delete the client user:
        - Click the **Delete User** button.
3. If you delete, you will get a message prompt confirming if you want to delete this user.

- An example of editing a client user in the **Client User Administration** page is displaye below:



Client User Access Administration

Introduction

- CEO Advisor groups are used to control users' access to the CEO Advisor portfolio contents. They are assigned to both Client Users and Topics.
- When the Client Administrator adds a new Client User, the user must be assigned to one or more Client Groups, thus limiting the Topics the user is permitted to see.

View/Edit Client User/Group Access

1. Click the **View/Edit Client User/Group Access** link from the **Client Administration** page.
2. Select or deselect the appropriate check boxes for the corresponding Client Users and Client User Groups.

   Note: A checked check box denotes that Client User will be included in the Client User Group.
3. Edit Client User details by clicking a Client User name (*Optional*). The Client User names are displayed vertically down the table.
4. Edit Client User Group details by clicking a Client User Group name (*Optional*). The Client User Group names are displayed horizontally across the table.
5. Click the **Update** button to save changes.

- An example of viewing/editing client user access in the **Client User Access Administration** page is displayed below:

CEO Advisor

Client User Access Administration

	Corporate	Group1	Group2	Marketing	Sales
1234User1	☑	☑	☑	☑	☑
Account_Managers	☐	☑	☐	☐	☑
Exec_Group	☑	☑	☐	☑	☑
jeffrey.zhou@acnielsen.co.nz	☑	☑	☑	☑	☑
JonesR	☐	☑	☐	☑	☑
LeeJ	☑	☑	☐	☐	☐
MillsK	☐	☑	☐	☑	☑
ThompsonAJ	☐	☑	☐	☑	☐

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Update

View/Edit Client Portfolio/Group Access

Return to Administration without editing

View/Edit Client Portfolio/Group Access

- CEO Advisor groups are used to control users' access to the CEO Advisor portfolio contents. They are assigned to both Client Users and Topics.
- When the Client Administrator adds a new Topic to the portfolio, they must choose which Client Groups will see the contents of that Topic.

1. Click the **View/Edit Client Portfolio/Group Access** link from the **Client Administration** page.
2. Select or deselect the appropriate check box for the corresponding Client Users and Topics.
3. Edit the Folders/Topics by clicking the document name links (*Optional*). Document names are displayed vertically down the table.
4. Edit the Groups by clicking Client User Group name links. (*Optional*) . Client User Group names are displayed horizontically down the table.
5. Click the **Update** button to save changes.

- An example of viewing/editing client portfolio access in the **Client Portfolio Access Administration** page is displayed below:

CEO Advisor

Client Portfolio Access Administration

	Corporate	G.A.M	Group1	Group2	Marketing	Sales
Documents						
1stQtr	☐	☐	☐	☐	☑	☑
2ndQtr	☐	☐	☐	☐	☑	☑
New Line Results	☑	☐	☐	☐	☐	☐
3rdQtr	☐	☐	☐	☐	☑	☑
Dist Reporting	☑	☐	☐	☐	☑	☑
Direc tOpen	☐	☐	☑	☐	☐	☑
IRAQ	☐	☐	☑	☐	☐	☑
TextFile	☑	☐	☑	☐	☐	☑
CPTFile	☐	☐	☑	☐	☐	☑
Resource1	☑	☐	☑	☐	☑	☑

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Update

View/Edit Client User/Group Access

Return to Administration without editing

Change Client Administrator User Password

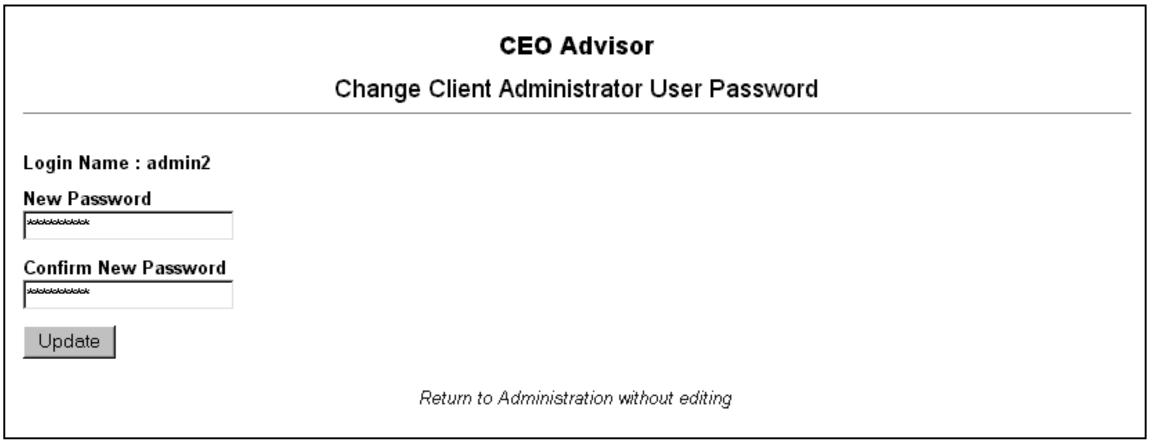
Introduction

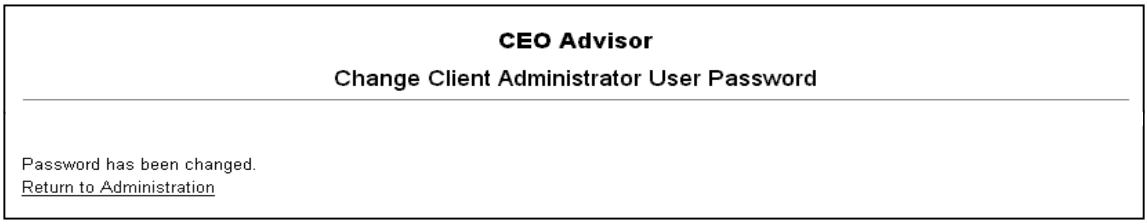
- The Change Password function enables the Client Administrator to change their login details.
- The newly entered details should meet the password field requirements.

Change Password

1. Click the **Change Password** hyperlink.
2. Type the new password into the New Password box.
3. Type the same password again into the Confirm New Password box.
4. Click **Update** button.
    - A confirmation message will appear when the password has been changed successfully

- Examples of changing a client password in the **Change Client Administratior User Password** page is displayed below:





User Manual

Introduction

- The **Administrator User Manual** page is used to view the CEO user manuals in .pdf format.
- **Administrator User Manuals** may also be printed or saved locally.
- An example of the **Administrator User Manual** page is displayed below:

Administrator User Manual

TYPE	TITLE	DATE	SIZE
	CRC Client Administrator User Manual	6 May 03	857.2 KB
	CEO Client Administrator User Manual	6 May 03	229.3 KB

Return to main Administration menu

View an Administration User manual

Open a manual by either,

1. Clicking on the **appropriate link** from beneath the **Title** header.
2. Clicking on the **appropriate .pdf** icon beneath the **Type** header.
3. Right clicking on either the **link** or **icon** and selecting **Open** or **Open in new window** from the pop up box.

Printing/Saving an Administration User manual

Print/Save a manual by either,

1. Right clicking over the **appropriate link/icon** from beneath the **Title/Type** header and select **Print Target** or **Save Target As . . .** from the pop up box.
2. Open the manual in a separate window and select **File > Print** from the menu bar.

Pocket Slides

Overview

Introduction

Before you can add portfolio items, you must first convert PowerPoint presentations to .cpt files. You then attach then .cpt files in the **Client Portfolio Administration** page. This will then enable the CEO Client to view the PowerPoint slides/presentations in the Pocket PC.

Installing PocketSlides.exe

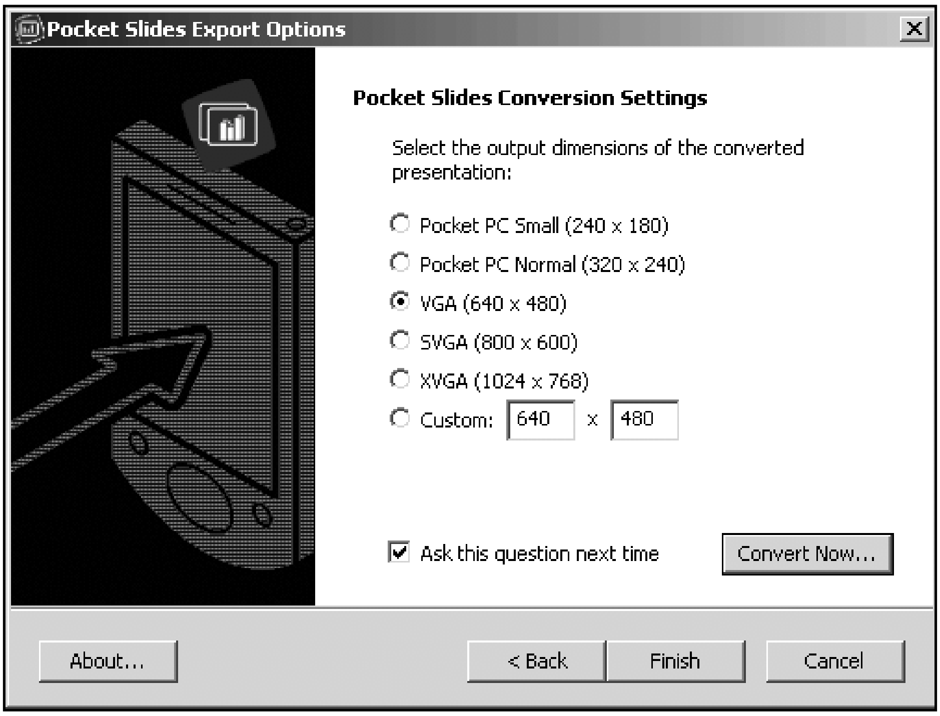
Go to **http://www.conduits.com/products/slides/PocketSlides.exe**. This will allow you to download a 30-day trial version of the PocketSlides application. Alternatively, you can purchase the application – go to **http://www.conduits.com/products/slides/purchase.asp**.

Once PocketSlides has been downloadeded to your PC, synchronise your Pocket PC, then run the PocketSlides.exe from your PC. Follow the install shield wizard until the application has been successfully installed.

Converting Presentations for Pocket PC Viewing

1. Run PocketSlidesExportOptions.exe.

   Result: The **Pocket Slides Export Options** wizard appears.
2. Click **Next**.
3. If prompted, select the output dimenstions for the presentation to be converted. The recommended dimension setting is VGA (640 x 480), as illustrated below:



4. Select the **Convert Now…** button.

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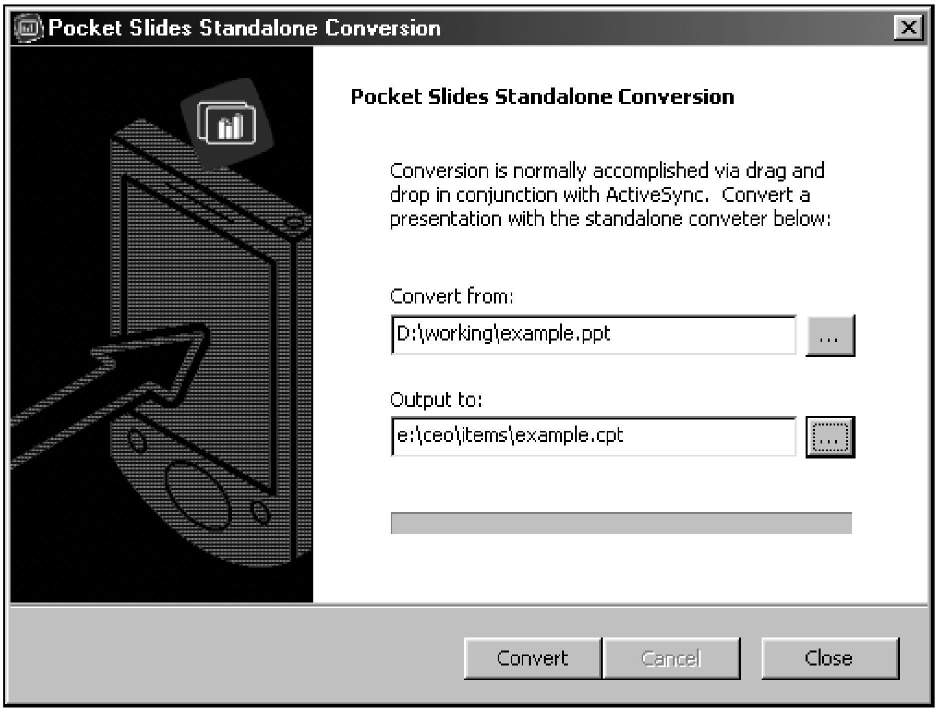
Converting Presentations for Pocket PC Viewing, Continued

5. In the **Convert from** text box, enter or browse to the path and filename of the presentation to be converted.

   Result:
   By default, the program will automatically duplicate the same path and filename in the **Output to** text box, but will change the file type to cpt.

   Note:
   You can manually change the path for the output file. This will be necessary if you are converting presentations from a local PC and outputting them to a server or remote PC location.



6. Click **Convert**.

   Results:

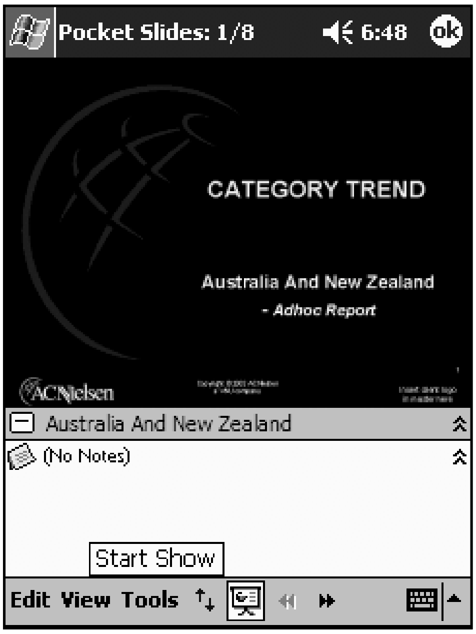
- The file will take a while to convert, depending on its size.
- The status bar will indicate its conversion progress.

Notes:

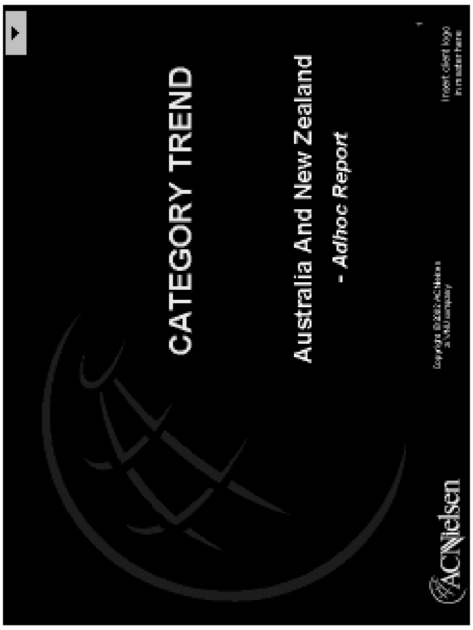
- When converted, the file will be ready to include in the Client Portfolio.
- In this screen, you can either close the application or continue converting files.

Viewing Presentations on the Pocket PC

- If the user selected the 'View after download' option in the CEO Advisor website, then the Pocket Slides application will automatically open the presentation. Otherwise the user must manually open the application and the file.
- The presentation opens in normal view where the user can add notes if desired, as illustrated below.



- To view the presentation in slide show mode, click on the **Start Show** icon on the bottom toolbar.



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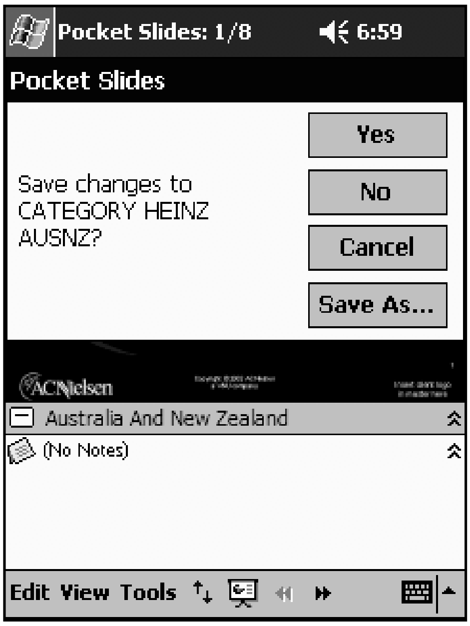
Viewing Presentations on the Pocket PC, Continued

- After viewing the presentation, the user will be prompted to save changes, as illustrated below:



- Once Pocket Slides has been closed, the user may return to the website to view additional news items.