

Quick Reference User Manual

Intelligent Tools for Policy Design



Quick Reference - User Manual for System Administration

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Editor(s): [Moise Maria](#), [Rumm Nikolaus](#)

Contributors: Pop Dragos Paul, Maria Moise

This is the Quick User Manual of the FUPOL system.

**Document
Description:**

The objective of this document is to brief describe system from the user's point of view, to give guidance on using its features and to support the user in learning about FUPOL.

QUICK REFERENCE - MANUAL

System Administration

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Managing Users

In order to manage the users, the administrator must use the User Administration menu on the left side of the Administration page. After logging in, the FUPOL start page is shown with two options in the menu at the top: Home and Administration. Chose the Administration option:

1. Log in on *"Fupol-Client"* as a system administrator
2. Select "Administration" from the menu

In the administration page there is a new menu on the left hand side. This menu offers two options: manage users and manage social media accounts.

By default, when the administration page loads, the Show User List view is loaded.



Adding a new user

In order to grant system access to new users a FUPOL account has to be set up on "Fupol-Client-Administration". The steps are as follows:

1. Log in on "Fupol-Client" as a system administrator
2. Select "Administration" from the menu
3. Select "Show User List" from the menu bar
4. Click "Add User"
5. Provide the user's data
6. Save the new account



After the form has been filled, the administrator can either save the new user, thus creating it (17) or cancel the whole process (18).

Note that the user's account is still not active as it has no password set yet. In order to activate his account the user has to set his password. As a system administrator you'll now inform the user about this fact and provide the account activation link to him:

1. Navigate back to the user list
2. Notice the icon indicating the user is not yet active
3. Click the username of the desired user

On the "View User" page that loads after clicking the username, do the following:

1. Click the "Send activation email" link

Upon clicking the "Send activation email" link, a new email message is composed, detailing the newly created user how to activate the new account.

Because accounts must be activated on the "Account Activation Page" by setting the user's password, this

View User

Username: mmoiserau
 First name: Maria
 Last name: Moise
 eMail: maria.moise@rau.ro
 Activated:
 Locking state:
 Roles: Facilitator



step must be done by the user himself as the password must be kept secret.

1. The user must chose a password
2. The user must enter the password again for verification
3. The user must click the "Save" button

Note that the password must follow these rules:

1. At least 5 characters in length
2. Must include both letters and numbers

The account activation page can be found at:

`<base url>/fupol-client/activateUser/<username>`

Once the user's account has been activated the user should be able to access the FUPOL client application.

Editing a user

A system administrator can edit a user's information.

Note that the username cannot be changed.

Follow these steps to edit a user:

1. Log in on *"Fupol-Client"* as a system administrator
2. Select "Administration" from the menu
3. Select "Show User List" from the menu bar
4. Click on the edit button beside the desired user
5. Edit user data
6. Save the changes

On the edit user page, change the desired user information and save the changes.

The screenshot shows the 'Edit User' page. At the top, there are tabs for 'all users' and 'trusted users only'. Below is a table with columns: Last name, eMail, and Actions. The first row shows 'Cristea' and 'silvia.adina@rau.ro'. In the Actions column, there is an 'edit' button highlighted with a red box and a red circle with the number 4. Below the table, the 'Edit User' form is displayed. It has fields for Username (sentina), First name (Adina Silvia), Last name (Cristea), eMail (silvia.adina@rau.ro), and a section for Roles. The Roles section has two lists: 'Available' (Domain Expert, eCitizen, Recruiter, Simulation Modeler, Trusted User) and 'Selected' (Decision Maker, Facilitator, Communicator). There is also a 'Personal data' section with fields for Gender, Date of birth, and Identification. A red circle with the number 1 points to the 'Roles' section, and a red circle with the number 2 points to the 'Save' button at the bottom of the form.

Viewing user data

In order to view user data, the administrator has to follow these steps:

1. Log in on *"Fupol-Client"* as a system administrator
2. Select "Administration" from the menu
3. Select "Show User List" from the menu bar
4. Click on the username of the desired user in the list
5. View the user data

Locking a user

Locking a user prevents him / her from accessing the client.

In order to lock a user, an administrator must navigate to the View User Page and perform the locking

The screenshot shows the 'Lock user' page. At the top, there are tabs for 'Identification' and 'Identities'. Below is a table with columns: Identification and Identities. A red circle with the number 5 points to the 'Lock user' button. Below the table, there is a confirmation dialog box with the text 'Do you really want to lock the user?' and buttons for 'OK' and 'Cancel'. A red circle with the number 6 points to the 'OK' button.

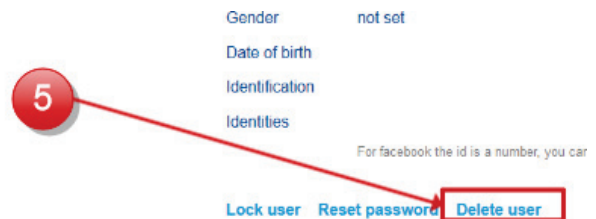
operation.

1. Log in on *"Fupol-Client"* as a system administrator
2. Select "Administration" from the menu
3. Select "Show User List" from the menu bar
4. Click on the username of the desired user in the list
5. Click the Lock User link on the bottom of the page
6. Confirm the lock by clicking Yes on the prompt

Deleting a user

In order to delete a user, an administrator must navigate to the View User Page and perform the locking operation.

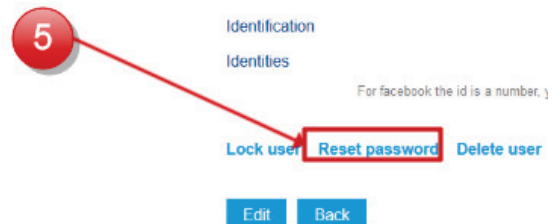
1. Log in on *"Fupol-Client"* as a system administrator
2. Select "Administration" from the menu
3. Select "Show User List" from the menu bar
4. Click on the username of the desired user in the list
5. Click the Delete User link on the bottom of the page
6. Confirm the deletion by clicking Yes on the prompt



Resetting a user password

In order to reset the password for a user, an administrator must navigate to the View User Page and perform the locking operation.

1. Log in on *"Fupol-Client"* as a system administrator
2. Select "Administration" from the menu
3. Select "Show User List" from the menu bar
4. Click on the username of the desired user in the list
5. Click the Reset Password link on the bottom of the page
6. Confirm the reset by clicking Yes on the prompt

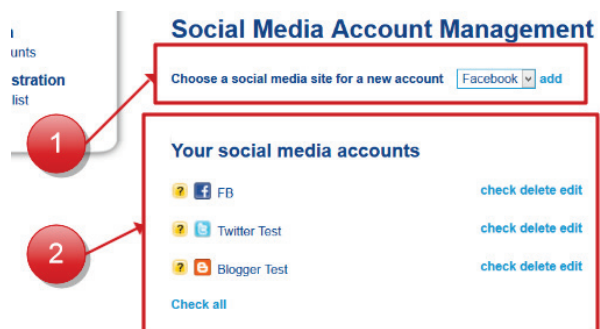


Managing social media accounts

Take the following steps to arrive at the administration page for social media accounts:

1. Log in on *"Fupol-Client"* as a system administrator
2. Select "Administration" from the menu
3. Select "Show accounts" from the menu bar

The administration page for social media accounts is shown. On this page, the administrator can perform the following actions:



1. Add a new social media account
2. Manage existing social media accounts

Adding a new account

In order to add a new social media account, an administrator has to follow these steps:

1. Log in on "*Fupol-Client*" as a system administrator
2. Select "Administration" from the menu
3. Select "Show accounts" from the menu bar
4. Chose a social media platform
5. Click the Add link
6. Fill in the form
7. Check the account
8. Save the data

To add a new social media account, the administrator has to have the credentials of the target social media application at hand. Currently, the platform supports Facebook, Twitter and Blogspot accounts.

Facebook

In order to add a Facebook-type Social Media Account to the FUPOL platform, the administrator needs to have a valid Facebook Account and setup a new Facebook Application.

Creating a new Facebook account

Note that this step is optional. If a Facebook account is available, the administrator may skip this step.

If no valid Facebook Account is available, one can be created by accessing the Facebook URL at <http://www.facebook.com>.

Creating a Facebook Application

The administrator needs to create a new Facebook Application in order to receive the credentials needed by the FUPOL platform.

The following steps describe how to create a new Facebook Application and how to obtain the necessary credentials required by the FUPOL platform:

1. Navigate to <http://developers.facebook.com>
 1. if needed, enter your password
 2. click the Continue button
2. Click the Apps link
3. Click the Register as a developer button (if already a registered developer skip this step)
 - a. accept the terms an conditions by checking the checkbox
 - b. click the Continue button
 - c. choose a country code
 - d. input a valid mobile phone number
 - e. click the Continue button
 - f. input the confirmation code received by sms
 - g. click the Continue button

- h. optionally turn on text notifications
- i. set phone number visibility
- j. click the Continue button
- k. optionally fill in the experience form
- l. click the Continue button or the Skip button
- m. click the Done button
4. Click the Create App button
5. Input new app details
 1. input app name
 2. optionally input app namespace
 3. optionally check the web hosting offer
 4. click the Continue button
6. Pass the verification test
 1. fill in the captcha text
 2. click the Continue button
7. Right down the App ID and App Secret codes

Step 1: Navigate to the developers page

Navigate to <http://developers.facebook.com>

1. if needed, enter your password
2. click the Continue button

Step 2: Click the Apps link

1. On the Facebook Developers page click the Apps link

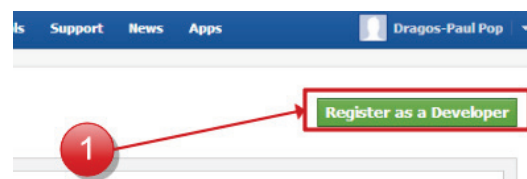


Step 3: Register as a Facebook developer

If the administrator is already registered as a Facebook developer, he may skip to Step 4.

1. Click the Register as a Developer button

After clicking the Register as a Developer button, a new modal dialog appears that prompts the user for some extra information.



The first item requires the user to accept the terms of the Facebook Platform Policy and the Facebook Privacy Policy.

1. Check the box and accept the terms
2. Click the continue button

The second item requires that the user should input a mobile phone number. A text message will be sent to this number that the user must enter in order to advance.

1. Choose a country code
2. Input a mobile phone number
3. Click the Continue button

After receiving the text message from Facebook, verify your account by entering the received code.

1. Enter the code received by SMS

2. Click the Confirm button

After confirming the phone number, chose notification options and number visibility.

Complete the registration by clicking on the “done” button.

Step 4: Create a new Facebook Application

On the Facebook Developers page create a new app.

1. Click the Create New App button

Step 5. Input new app details

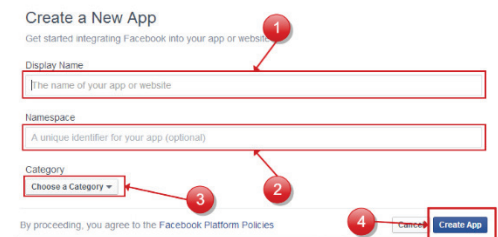
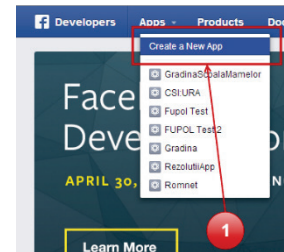
1. Input app name
2. Optionally input an app namespace (not required by the FUPOL platform)
3. Choose a category for the app

Step 6: Pass verification

1. Carefully decipher the Capcha image
2. Input the text
3. Click the Continue button

Step 7: Write down the app info

1. Write down the App ID
2. Hit the Show button to reveal the App Secret
3. Write down the App Secret

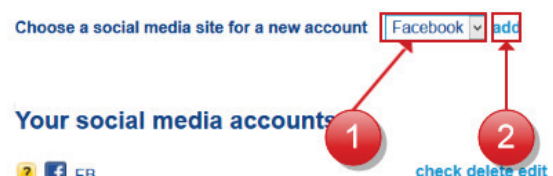


Creating a new Facebook type social media account on the FUPOL platform

After having created a new Facebook Application, the administrator has to return to the FUPOL-client administration page and navigate to the Social Media accounts page. There, choose Facebook as the platform and click the Add button.

1. Choose Facebook from the select menu
2. Click the Add button

Fill in the form to add a new Facebook account to the FUPOL platform.



Twitter

In order to add a Twitter-type Social Media Account to the FUPOL platform, the administrator needs to have a valid Twitter Account and setup a new Twitter Application.

Creating a new Twitter account

Note that this step is optional. If a Twitter account is available, the administrator may skip this step.

If no valid Twitter Account is available, one can be created by accessing the Twitter URL at <https://twitter.com>.

Creating a Twitter Application

After confirming the new Twitter Account, the administrator will need to browse to the Twitter Developers website, sign in using the available Twitter account and follow the steps to create a new Twitter Application and write down the credentials needed for the FUPOL platform social media account.

Follow these steps to create a new Twitter Application:

1. Navigate to Twitter Developers
2. Sign in using Twitter account credentials
3. Navigate to My Applications
4. Create a new application
5. Fill in the application details
6. Generate an access token
7. Review the access token

Step 1: Navigate to Twitter Developers

1. Browse to <https://dev.twitter.com>
2. Sign in

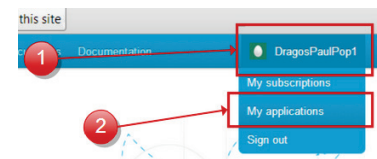
Step 2: Sign in using Twitter account credentials

After clicking the Sign in link, the Sign in page loads where the administrator can any Twitter account credentials to log into the Twitter Developers platform.

Step 3: Navigate to My Applications

One logged into the Twitter Developers platform, navigate to the My Applications section.

1. Click the Twitter username
2. Click the My Applications button



Step 4: Create a new application

Once on the My Applications page, locate and click the Create a new application button

1. Click the Create a new application button

Step 5: Fill in the application details

On the Create an application page, fill in the form with the appropriate data.

1. Fill in the name of the application

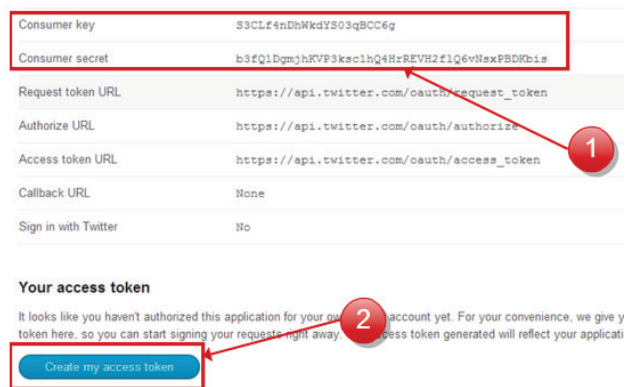
A screenshot of the 'Create an application' form in the Twitter Developers platform. The form is titled 'Create an application' and contains several sections. The 'Application Details' section has four fields: 'Name' (with a red circle 1 next to it), 'Description' (with a red circle 2 next to it), 'Website' (with a red circle 3 next to it), and 'Callback URL' (with a red circle 4 next to it). Below this is the 'Developer Rules Of The Road' section, which includes a 'Last Update' field (with a red circle 5 next to it) and a 'Rules of the Road' section. The 'CAPTCHA' section has a 'CAPTCHA' field (with a red circle 6 next to it) and a 'Create your Twitter application' button (with a red circle 7 next to it).

2. Fill in the description
3. Fill in the website (read the field description for more details)
4. Optionally fill in the callback URL
5. Carefully read and agree the Developer Rules of The Road
6. Fill in the security captcha
7. Click the Create your Twitter application button

Step 6: Generate an access token

After successfully creating the application it's time to generate an access token. This token data, along with the Consumer info, is required by the FUPOL platform in order to connect to Twitter and mine for data.

1. Write down the Consumer key and Consumer Secret
2. Click the Create my access token button



Consumer key	53CLf4nDnWkdY303qBCC6g
Consumer secret	b3fQ1DgmjhKVP3kac1hQ4HrREvH2f1Q6vMaxPBDKb1e
Request token URL	https://api.twitter.com/oauth/request_token
Authorize URL	https://api.twitter.com/oauth/authorize
Access token URL	https://api.twitter.com/oauth/access_token
Callback URL	None
Sign in with Twitter	No

Your access token

It looks like you haven't authorized this application for your account yet. For your convenience, we give you a temporary access token here, so you can start signing your requests right away. The temporary access token generated will reflect your application's permissions.

Create my access token

Step 7: Review the access token

After the generation of the access token, write it down, as it is needed to successfully link the Twitter application to the FUPOL platform.

Please note that sometimes access token generation fails on first attempt. Click the button to try again until an access token is successfully generated.

1. Review the access token and the access token secret

Creating a new Twitter type social media account on the FUPOL platform

After having created a new Twitter Application, the administrator has to return to the FUPOL-client administration page and navigate to the Social Media accounts page. There, choose Twitter as the platform and click the Add button.

1. Choose Twitter from the select menu
2. Click the Add button

After clicking the Add button, a form appears that needs to be filled.

Blogspot

In order to add a Blogspot-type Social Media Account to the FUPOL platform, the administrator needs to have a valid Google Account.

Creating a new Google account

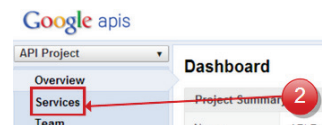
Note that this step is optional. If a Google account is available, the administrator may skip this step.

If no valid Google Account is available, one can be created by accessing the Blogger URL at <http://www.blogger.com>.

After completing the sign-up process, it's time to request access to the Blogger API.

Requesting access to Blogger API

1. Navigate to <http://code.google.com/apis/console>
2. Click on the Services menu item



On the services page locate The Blogger API service and click the "Request access" link.

1. Click on the "request access" link next to "Blogger API v3"



On the "Quota request" fill in the form and submit it.

1. DO NOT change the value in the "project" field
2. DO NOT change the "email" field
3. Describe why you need to use the API (e.g. "Working with the FUPOL platform")
4. Leave the "quota" field empty
5. Submit the form

After submitting the form, wait for the confirmation email. Note that it may take several days for the email to arrive. Follow the instructions in the email to activate the API access key.

Creating a new Blogspot type social media account on the FUPOL platform

After having obtained a new API Key, the administrator has to return to the FUPOL-client administration page and navigate to the Social Media accounts page. There, choose Blogpost as the platform and click the Add button.

1. Choose Blogpost from the select menu
2. Click the Add button

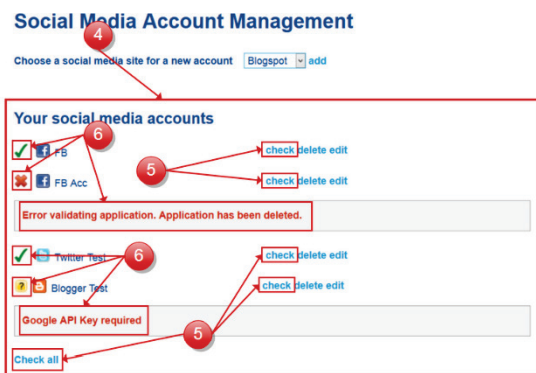
After clicking the Add button, a form appears that needs to be filled.

Checking an existing account

An administrator can check social media accounts to see if the credentials still work. These are some of the reasons an account might fail: improper configuration, account suspension, key expiration, application deletion, etc.

In order to check the social media accounts set-up with the FUPOL platform, follow these steps:

1. Log in on "Fupol-Client" as a system administrator
2. Select "Administration" from the menu
3. Select "Show accounts" from the menu bar
4. Choose an account from the *Your Social Media Accounts* section
5. Click the Check button beside the desired account or click the Check all button to check all accounts
6. Review the Check status



The figure shows both social media accounts that have passed the checking process and ones that haven't. The reasons the checking process failed for some account is highlighted by the platform itself.

Deleting an account

Deleting a social media account set-up on the FUPOL platform is as easy as going to the Social Media Account Management page and clicking the Delete button beside the desired account.

1. Log in on *"Fupol-Client"* as a system administrator
2. Select *"Administration"* from the menu
3. Select *"Show accounts"* from the menu bar
4. Choose an account from the *Your Social Media Accounts* section
5. Click the Delete link beside the desired account
6. Confirm the deletion

When the administrator click the delete link, a confirmation dialog appears.

Editing an account

In order to edit a previously set-up social media account on the FUPOL platform, follow these simple steps:

1. Log in on *"Fupol-Client"* as a system administrator
2. Select *"Administration"* from the menu
3. Select *"Show accounts"* from the menu bar
4. Choose an account from the *Your Social Media Accounts* section
5. Click the Edit link beside the desired account

After clicking on the Edit link, a content box slides down and the administrator can edit the account settings.

For detailed information about the form fields, please review the *Adding an account* section under *Managing social media accounts* in the *System Administration* chapter of this manual, and choose the desired account type subsection.