

# **INTERAXO™**

## **Administration Guide**

Symetri Collaboration AS  
Høffsveien 1 C  
N-0275 OSLO  
Norway  
Phone +04550  
[www.interaxo.com](http://www.interaxo.com)  
[support@symetricollaboration.com](mailto:support@symetricollaboration.com)

Org. reg. no. 983443117 NO

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## 1 INTRODUCTION

### 1.1 General

Up to now, administration functions have been integrated in the collaboration application Interaxo. Now there is a new, improved and dedicated administration client available for administrators of Interaxo.

The intention with the new administration client is to provide a better overview of the Interaxo system, increase the efficiency and to simplify administration tasks for all types of administrators. In addition, we wanted to gather all administration of community, workspaces, rooms, users and groups in one place and with a higher degree of self service.

In the longer term, more advanced features will be implemented. In particular functions meeting the demands of large enterprises, such as integrated workflows, advanced member management etc.

### 1.2 New structure

While launching the new administration client, we also introduce a new structure in Interaxo having the following 4 levels:

- **Customer (new)**  
The Customer level is available to Symetri Collaborations's System Administrator only.
- **Community**  
With the new structure, customers normally will need only one, or a few communities. Communities are being created by the System Administrator, but may be managed by the Community Administrator.
- **Workspace (new)**  
Typically, there will be many Workspaces in a Community, e.g. representing the different projects. Workspaces act as containers for Rooms. In this way, customers can group their Rooms according to their individual needs. Depending on the contract, customers may create new Workspaces themselves. Once created, Workspaces are managed by the Workspace Administrator.
- **Room**  
All Rooms must reside in a Workspace. Users of customers having only 1 Workspace will not be affected by the new structure when working in the Interaxo client. With 2 or more workspaces, they will see which Workspaces their Rooms belong to. Rooms are created by the Workspace Administrator and subsequently managed by the Room Administrator.

The administration client is available to all administrator, i.e. System-, Community-, Workspace- and Room Administrators. Available functions are dependent on the administrator's level.

## 2 HOW CAN I ACCESS THE NEW ADMINISTRATION CLIENT?

### 2.1 Introduction

Administrator privileges on a certain level has to be granted by an Administrator on a higher level. Log in to Interaxo © with one of the following administrator levels:

- Community Administrator
- Workspace Administrator or
- Room Administrator

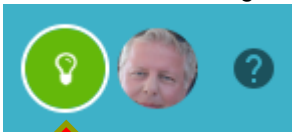
If you are a Room Administrator, you have to select a room before you can click the *Administration* option in the top bar:



### 2.2 General aspects of the new administration client

This is how you can use the administration client:

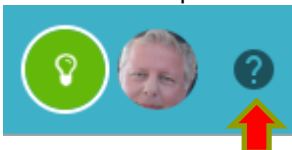
- Provide feedback regarding requests for change:



- Make changes to your user profile, alternatively log off:



- Access the Help Center for assistance:



- Select an option from the main menu:



Show/hide the main menu



Show settings for the current Community









List Community members (*available to Community Administrator only*)

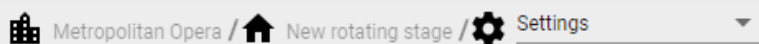


List available Workspaces and Rooms

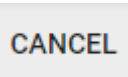
Functions for the current Room:

-  Settings
-  onSite mobile
-  Print orders
-  File templates
-  Members
-  Groups

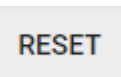
- Use the breadcrumb to see where you are:



- Standard buttons:



Cancel the current operation.

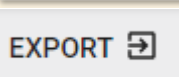
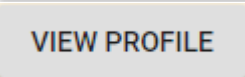
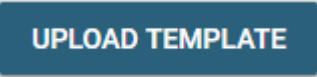


Restore form fields to their original values. This button is enabled only if changes have been made on the form.





Remember to submit your changes. This button is enabled only if changes have been made on the form.

- In addition there are a number of buttons for miscellaneous functions, e.g.



- For *Workspaces & Rooms*, the following symbols are used:



-  Workspace expanded (Room list is visible)
-  Context menu

The administration client can be closed by logging out or by closing the browser tab.

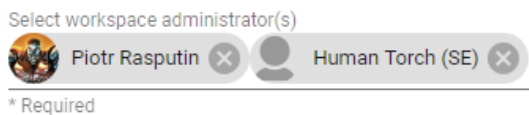
## 2.3 How do I use the simple and advanced member pickers?

In order to select users in member fields in a common way across forms and functions the administration client provides two ways for doing this:

The simple member picker offers small installations with a limited amount of users a quick and easy way of selecting field values. The advanced member selector is meant for large installations with thousands of members.

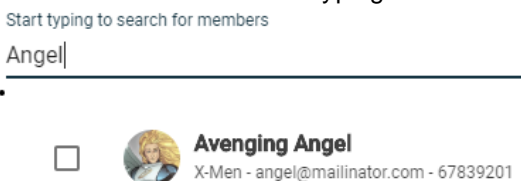
How to use the *simple member picker*:

- Click the down-arrow to see the list of members



OR

- Click on the field and start typing to search for members





- Click a member to add him/her to the field
- When done, click outside the list to see all selected members

To use the advanced member selector, click

### ADVANCED MEMBER SELECTOR

and obtain a more detailed member list:

X-Men		CLEAR FILTER						
A-C	D-F	G-I	J-L	M-O	P-R	S-U	V-X	Y-Z
<input checked="" type="checkbox"/> Avatar	First Name ↑	Last Name	Title	Company	Email	Phone		
<input type="checkbox"/>		Avenging Angel		X-Men	angel@mailinator.com	67839201		
<input type="checkbox"/>		Emma Frost (NO)		X-Men	emma.frost@mailinator.com	78023429		

From this list you can

- Search for members by typing in the *Filter* field (here *X-Men*)
- Change the sorting order by clicking a column heading
- Navigate directly to the desired letter interval, e.g.:  
P-R
- Tick off the members to include and push the ADD MEMBERS button

**ADD MEMBERS**

The selected members will now be listed in the member field.

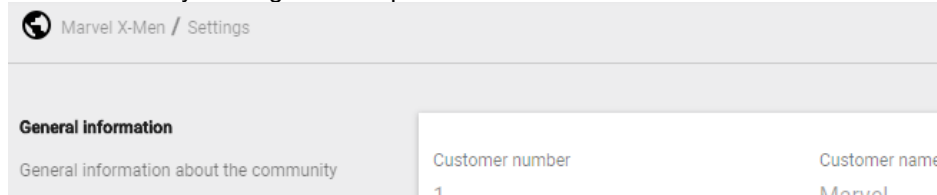
### 3 HOW DO I ADMINISTER MY COMMUNITY?

#### 3.1 Show Community settings

All administrators can see the Community settings by clicking



The Community settings form is presented:



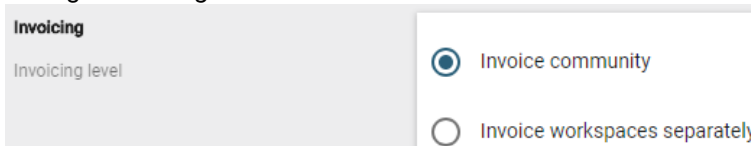
On Community level, a number of features can be activated by the System Administrator. Mouse-over the accompanying (i) icon to see a description of the feature:



#### 3.2 Which settings can be altered?

All administrators can view the Community settings. The Community Administrator can alter the following settings:

- Remove or replace the *Logo*
- Change *Invoicing level*



**Note:** This is only possible if the *Shared users* -feature is activated.

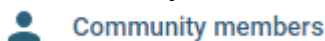
System Administrator only can alter all Community settings. Please contact your sales rep. Or our support dept. to request for changes.

#### 3.3 How do I save changed settings?

- Make your changes
- Click the **SUBMIT** button.  
Please note that changes can be reverted by clicking the CANCEL button before they are submitted.

#### 3.4 Community members

The community member list is available to Community Administrator only. To see the members, click







The Community member list is presented:

Marvel X-Men / Community members

All users X-Men CLEAR FILTER

Drag a column header here to group by that column

<input type="checkbox"/>	Avatar	First Name ↑	Last Name	Title	Company	Email
<input type="checkbox"/>		Avenging	Angel	Room Admin	X-Men	angel@mailinator.com
<input type="checkbox"/>		Emma	Frost (NO)	Observer	X-Men	emma.frost@mailinator.c...

(EN, pls)

On this form you can:

- Hide/show columns



- Filter the list

Choose *All users*, *Active* or *Deactivated* members. In addition you can add your own filter (here *X-Men*):

- Group the list on one or more columns
- Sort the list ascending or descending on any column

First Name ↑

- Activate/Deactivate Community members

DEACTIVATE

- View a member's user profile

VIEW PROFILE

- See the number of members listed as well as the total number of members in the Community  
Showing 8 of 1,023

## 3.5 How can I update my personal user profile?

Click your profile picture and then again the *View profile* link



- All *Personal information* fields can be changed. Please note that the following fields are mandatory:
  - First name
  - Last name
  - E-mail
- Room information cannot be altered. The only thing you can do is sort on any column
- Under *Settings* you can
  - view your status
  - change notifications (nightly report)
  - select preferred language
- *Subscriptions* lists content you have subscribed to. No changes can be done here, but click the *Title* link to manage the subscription in the Interaxo client.
- Remember to **SUBMIT** your changes

### 3.6 How can I see and update other members' user profile information?

To view a member's user profile, you have to:

- In the Room or Community member list, navigate to the member in question and tick him/her off:

Bård Bårdstu

- Click

VIEW PROFILE

Depending on your administrator level, you may have access to:

- **Personal information**  
Shows a member's personal settings, such as name and contact information. Community Administrator can change all fields except for *E-mail*.  
The Room Administrator cannot change any of these fields.
- **Rooms**  
Lists Rooms and respective Workspaces the member has access to.  
*Community Administrator* will see all Rooms the member has access to.  
The *Workspace Administrator* will only see Rooms residing within Workspaces he is administering and to which the member has access.  
*Room Administrator* can only see the Rooms he is administering to which the member has access.  
All administrators can change the member's role and group memberships in any of the listed Rooms.
- **Settings**  
Shows a member status, whether the member is invoiceable or not, notification settings and preferred language.  
Community Administrator only can edit a member's notification and language settings. System Administrator can change the invoiceable setting:

Invoiceable

Invoiceable ⓘ

## 4 HOW DO I ADMINISTER MY WORKSPACES?

### 4.1 Introduction

A Community may consist of multiple Workspaces. A Workspace belongs to one, specific Community. Workspaces can contain many Rooms, but a Room must belong to one, specific Workspace at a time (but can be moved).

New Workspaces can be created by the Community Administrator if the *Workspaces* feature has been activated on Community level. Otherwise, this has to be done by the System Administrator.

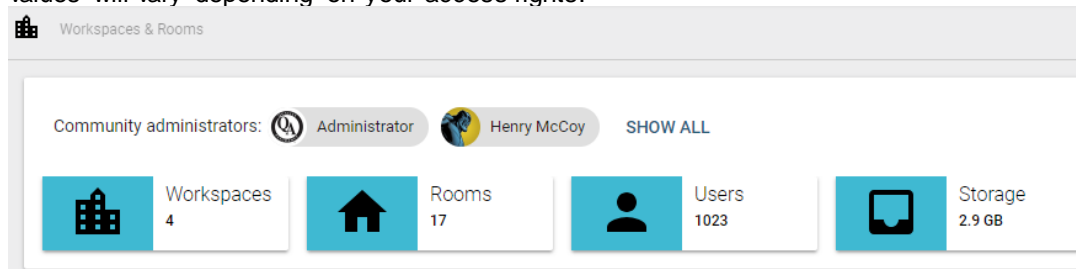
Rooms contain information added by the Room members as they collaborate, using Interaxo in the different projects.

### 4.2 How can I list my Workspaces?

Get an overview of all Workspaces and Rooms by clicking

 [Workspaces & Rooms](#)

In the content pane all Community Administrators are presented. Underneath you will see a mini dashboard showing the following statistics: Number of Workspaces, Rooms, Users and GB of Storage used. Dashboard values will vary depending on your access rights.



**Note:** Number of Users is visible to Community Administrator only

The grid of Workspaces lists all Workspaces you have access to in this Community. Community Administrator will see all Workspaces and all Rooms. A Workspace Administrator will see a list of Workspaces he administers and their respective Rooms. A Room Administrator sees the Workspaces that contain the Rooms he is administering:

Filter...

	Workspace ↑	Storage	Rooms	Admins
>	⋮ Metropolitan Opera		1	Avenging Angel, Piotr Rasputin
>	⋮ NY Yankee Stadium		2	Piotr Rasputin

### 4.3 How do I administer my Workspaces?

The following functionality is available:

- As Community Administrator you can create new Workspaces by clicking



Provide General information and appoint Workspace Administrators (at least one):

**Note:** If you don't have an agreement allowing you to create Workspaces yourself, you can instead order this service from Symetri Collaboration by clicking **ORDER NEW WORKSPACE**, which brings you to this web page:

- Change Workspace settings  
Community- and Workspace Administrator can click the context menu and choose *Settings*:



The followin fields can be changed:

- Title  
*Workspace name*
- Description
- Workspace Administrators
- Invoicing  
*If Invoice workspaces separately is activated on Community level*

Remember to **SUBMIT** your changes.

- Create a new Room  
*(see separate chapter)*
- Delete Workspace  
Community Administrator removes a Workspace by selecting the *Delete* menu option.

## 4.4 How can I find the Rooms in my Workspaces?

The list of available Rooms appears by expanding the Workspaces.

- ✓ Community Administrator will see all Rooms in all Workspaces
- ✓ Workspace Administrator will see all Rooms inside the Workspaces he is administering
- ✓ Room Administrator will only see the Rooms he is administering inside their respective Workspaces

Workspace ↑	Storage	Rooms	Admins								
<div style="display: flex; align-items: center;"> <span style="margin-right: 5px;">▼</span> <span style="margin-right: 5px;">⋮</span> <span>Metropolitan Opera</span> </div>		1	Avenging Angel, Piotr Rasputin								
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Room ↑</th> <th>Storage</th> <th>Members</th> <th>Admins</th> </tr> </thead> <tbody> <tr> <td> <div style="display: flex; align-items: center;"> <span style="margin-right: 5px;">⋮</span> <span>New rotating stage</span> </div> </td> <td>0.0 GB</td> <td>4</td> <td>Henry McCoy , Avenging Angel</td> </tr> </tbody> </table>				Room ↑	Storage	Members	Admins	<div style="display: flex; align-items: center;"> <span style="margin-right: 5px;">⋮</span> <span>New rotating stage</span> </div>	0.0 GB	4	Henry McCoy , Avenging Angel
Room ↑	Storage	Members	Admins								
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<div style="display: flex; align-items: center;"> <span style="margin-right: 5px;">&gt;</span> <span style="margin-right: 5px;">⋮</span> <span>NY Yankee Stadium</span> </div>		2	Piotr Rasputin								

Rooms can easily be retrieved by searching for them:

CLEAR FILTER

## 4.5 How do I move a Room to another Workspace?

In order to be move a Room from one Workspace to another, the Workspace Administrator has to administer both. This is done by performing the following steps:

- Expand the Workspace for the Room in question



- Click the uRoom context menu



- Select the *Move* menu option
- Pick the new Workspace from the drop-down

NY Yankee Stadium
▼

CANCEL
MOVE

- Hit the **MOVE** button

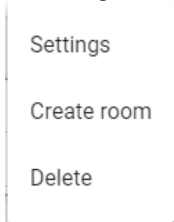
## 5 HOW DO I ADMINISTER MY ROOMS?

The Room Administrator is the main responsible for managing Rooms. Worspace Administrator is cerating new Rooms. Both administrators can delete obsolete Rooms.

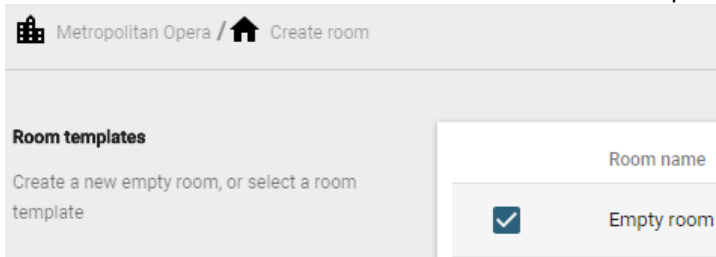
### 5.1 How do I create a new Room

Workspace Administrator creates a new Room by

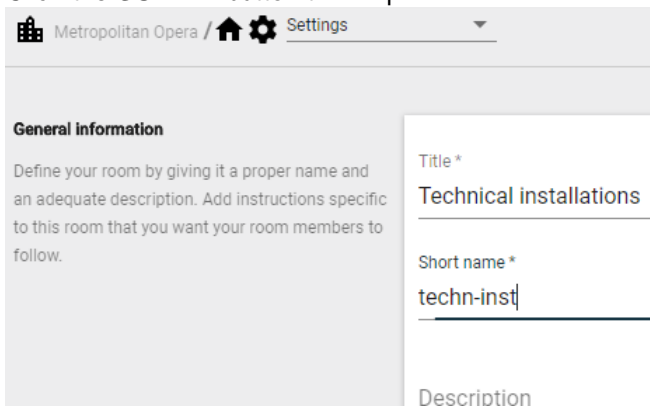
- selecting *Create room* option from the Workspace context menu:



- Decide whether to create the new Room based on a template room, or as an empty Room:



- Click the **SUBMIT** button to complete the Room's settings:



**Note:**

*Room members can no longer create new Rooms. Instead, they can order a new Room by clicking the **Order new room** button in Interaxo, and a notification will be sent to all Workspace Administrators.*




## 5.2 How can I change Room settings?

Navigate to the Room, click the Room's name to get to its settings. The following fields can be altered:

- ✓ Title (room name)
- ✓ Description
- ✓ Instructions (Information that will be presented when opening the Interaxo client)
- ✓ Room Administrators
- ✓ Ttemplate (tick if this Room is to be a temokate room)
- ✓ Workspace (move the room to another Workspace)
- ✓ Invitation text (standard or custom)


## 5.3 How can I make folders available to the onSite Mobile app?

The Room Administrator can select active folders that will be exposed to users of the onSite Mobile app:

- Select the Room in question
- Click the *onSite mobil* option from the main menu  

- Click the **ADD FOLDER** button
- Navigate the folder structure and add desired folders
- Pick custom fields to be exposed for the respective folders

## 5.4 How can I order print-outs?

In order to make ordering of print-outs as smooth and effective as possible in Interaxo, the Room Administrator should add as much ordering details as possible. This is done by performing the following steps:

- Select the Room in question
- Click the *Print orders* main menu option  

- Select members that can order copies
- Add as much as possible of:
  - ✓ Printing office information
  - ✓ Company information
  - ✓ Invoicing information
  - ✓ Delivery information
  - ✓ Production details

## 5.5 How do I manage file templates?

File templates can be organized in a folder hierarchy, if expedient. Navigate to the file templates by

- Opening the Room in question
- Click the *File templates* main menu option



Click a template folder's name to drill down to the next level in the hierarchy. Navigate upwards by clicking the desired item in the folder breadcrumb. Search for file templates by

- Navigating to the desired template folder
- Type your search string into the *Filter...* field

*Filter...*

Room Administrator creates new template folders by

- Selecting the parent template folder
- Clicking the **ADD FOLDER** button
- Typing the folder's name

Common Templates| CANCEL SUBMIT

- **SUBMIT**ting the operation

Upload file templates

- Navigate to the desired template folder
- Click the **UPLOAD** button
- Select the correct file from the file system

Download file templates

- Navigate the template folder hierarchy
- Tick off desired template files
- Click the **DOWNLOAD** button

Rename template folders and files

- Tick off the folder/file
- Click the **RENAME** button
- Type in the new name

Rename to General|Templates

- Click the **SUBMIT** button

Remove template folders and files

- Tick off obsolete folders/files
- Click the **DELETE** button
- Confirm by clicking **YES**


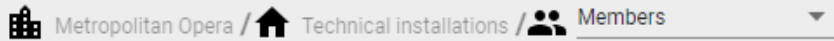


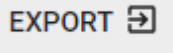
## 5.6 How do I manage Room members?

The Room Administrator is responsible for granting Community members access to his Rooms. He can also create brand new members and import members from Excel.

Room members are listed by

- Opening the Room in question
- Selecting the *Members* option from the main menu

Available functions on the Room member list:

- Hide/show columns  

- Sort the list on any column  
**Firma** ↑
- Group the member list on none or more columns  
**Dra en kolonneoverskrift hit for å gruppere på kolonnen**
- Chose to see *All users*, *Active* or *Deactivated*  
**All users** ▼
- Search for members by matching the search string against the following columns:
  - First name
  - Last name
  - Role
  - Company
  - E-mail
  - Telephone
  - Mobile
- Check number of visible members vs total number of members in the Room  
**Viser 3 av 5**
- Jump directly to another menu option within the same Room, e.g. if main menu is collapsed  

- Add new Room members  

- Import Room members from Excel  

- Export Room members to Excel  


## 5.7 How can I add Room members?

As the Room Administrator you can add room members by performing the following steps:

- Open the Room in question
- Click the **ADD MEMBERS** button

- **A) Choose existing** Workspace members from the drop-down, or click *Select members* and type the email address to find a match among the Community members.

Send invitation email

Select members. Start typing to search for members

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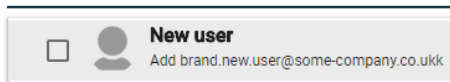
Alternatively, use the **ADVANCED MEMBER SELECTOR**.

- Decide whether members should be invited now or later (deselect *Send invitation*)
- **B) Create brand new members** by clicking *Select members* and type their full email address. Decide to invite the new user or not and click **New user**:

Send invitation email

brand.new.user@some-company.co.ukk

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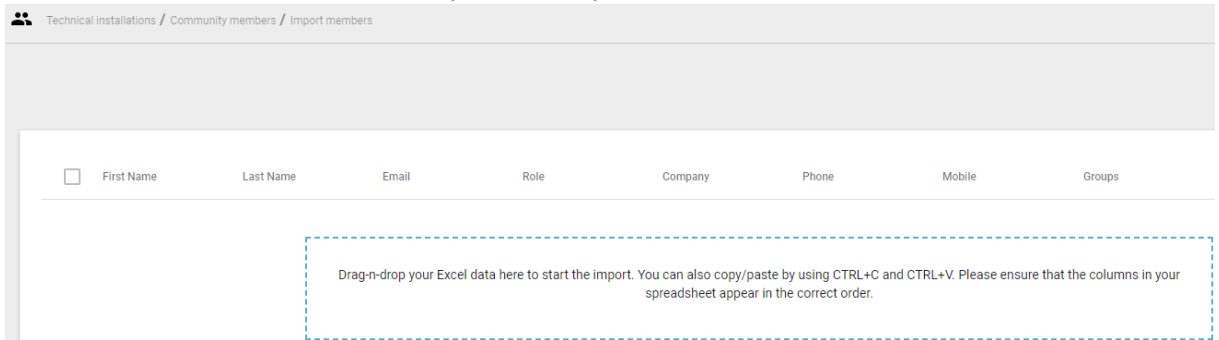


- Click the **SUBMIT** button

## 5.8 How can I import Room members?

Being the Room Administrator, you can import Room members from Excel.

- Open the Room in question
- Click **IMPORT MEMBERS** and the import form is presented:



- Open the Excel sheet and copy desired rows (CTRL+C)

	A	B	C	D	E	F	G	H
1	<b>First Name</b>	<b>Last Name</b>	<b>Email</b>	<b>Role</b>	<b>Company</b>	<b>Phone</b>	<b>Mobile</b>	<b>Groups</b>
2	Don	Giovanni	<a href="mailto:don@metopera.com">don@metopera.com</a>	Participant	Metropolitan Opera		123456789	
3	Queen	of the Night	<a href="mailto:diana.damrau@smth.eu">diana.damrau@smth.eu</a>	Observer	Freelance	987654321		MozartQueens

- Paste (CTRL+V) the copied rows into Interaxo  
**IMPORTANT:** The order of the 8 first columns in the Excel sheet **must** match the equivalent 8 first columns in Interaxo. If necessary, reorder the Excel sheet columns before you paste the selected rows.
- Click the **SUBMIT** button

## 5.9 How do I invite Room members?

Room members can be added without inviting them into the Room. This might be the case when the Room Administrator wants to finish all configurations before the Room can be used.

Perform the following steps to invite Room members:

- Open the Room in question
- Select the *Members* main menu option
- Tick off the members you want to invite
- Click the **INVITE** button

Selected members will receive an email with a link to the Room. By clicking the link, Interaxo will be initiated in the browser and the Room in question will be opened.

**Note:** Brand new members must type their full name (unless already done by the Room Administrator) and their personal password when logging in for the very first time. In addition, they have to accept Interaxo's terms and conditions.

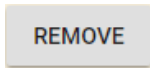
## 5.10 How do I remove Room members?

Room Administrator can remove Room members by performing the following steps:

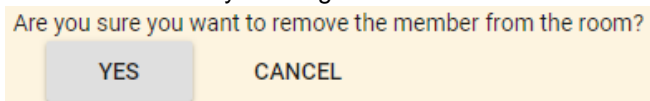
- Open the Room in question
- Select *Members* option from the main menu
- Tick off desired Room members from the room member list



- Click the **REMOVE** button



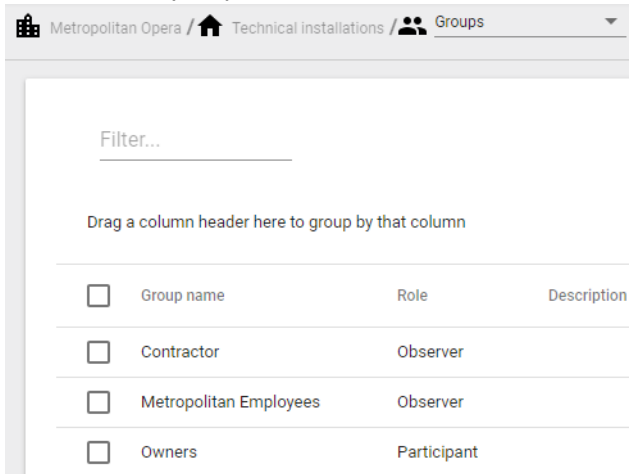
- Confirm removal by clicking the **YES** button



## 5.11 How do I manage Room Groups?

Do the following to review Room Groups:

- Open the Room in question
- Click the *Groups* option from the main menu to list all Groups



- Click the Group's name to open it and view its members

As Room Administrator, perform the following steps to create Room Groups:

- Open the Room in question
- Click the **CREATE GROUP** button
- Provide Group settings and add desired Room members to it

**Group settings**

Group properties. The group's name must be unique

Group name  
**Metropolitan Employees**

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Role \*  
Observer ▼

---

Description  
Important stakeholders

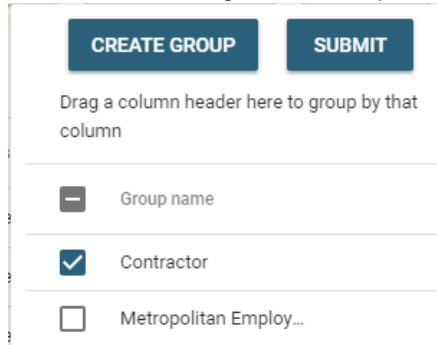
- Click the **SUBMIT** button



You can add new Room group members in two ways:

A) From the Room member list

- Check at least 2 Room members from the Room member list
- Click the **ADD TO GROUP** button
- Choose an existing Room Group and click the **SUBMIT** button



The screenshot shows a web interface with two buttons at the top: "CREATE GROUP" and "SUBMIT". Below the buttons is a text prompt: "Drag a column header here to group by that column". Underneath is a table with three columns. The first column is "Group name" with a minus sign icon. The second column is "Contractor" with a checked checkbox icon. The third column is "Metropolitan Employ..." with an unchecked checkbox icon.

**alternatively**

- Click the **CREATE GROUP** button to create a new Group
- Provide the new Room Group's settings
- Click the **SUBMIT** button

B) From a Room Group

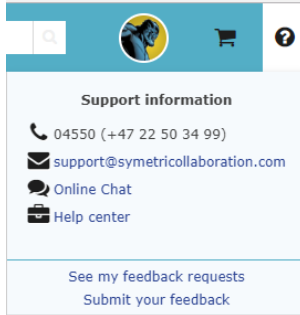
- Open the Room Group
- Click *Select members*, or use the *Advanced member selector* to select Group members
- Click the **SUBMIT** button

Room Groups can be removed by

- Clicking the *Groups* option from the main menu
- Check one or more Room Groups from the list
- Click the **DELETE** button
- Confirm deletion by answering **YES**

## 6 HOW CAN I GET ADDITIONAL ASSISTANCE?

If more help is needed, you have several options. By clicking the question mark in Interaxo's top pane, you can choose to:



1. Call Symetri Collaboration's Help Desk and talk to one of our support consultants
2. Send an email to our support department
3. Chat with a support consultant
4. Click the *Help Center* and read more about Interaxo and the Administration Client

In the Administration Client you can

1. Initiate the *Help Center* by clicking the question mark in the top pane
2. Report errors and defects by clicking the light bulb



Here you can enter your change requests. These will in turn be evaluated by our Product department. You can count on getting our feed back. Some times more information is needed, other customer might have similar requests etc. We always aim at following up your requests by informing you on how the request will be handled further down the road.