

Company Admin Configuration Guide



Welcome to Go Insource

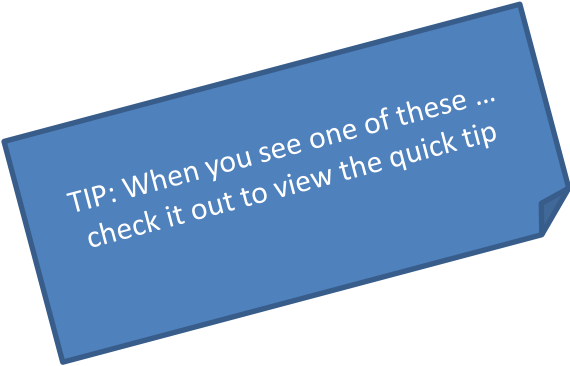
This guide is designed for the Company Admin users and will assist you in configuring your Go Insource solution. The “Quick Start” guide should be read prior to working through this configuration guide.

We’ll explain how to configure the solution to look and feel like your own company. Along the way we will provide tips on an effective way to configure the options in your solution ... just remember this is only one possible option – you have the final say!

What to Expect

In this guide you will;

- Learn to configure the “User Definable” fields
- Gain an understanding of the dashboards
- See examples for each of the settings



TIP: When you see one of these ...
check it out to view the quick tip

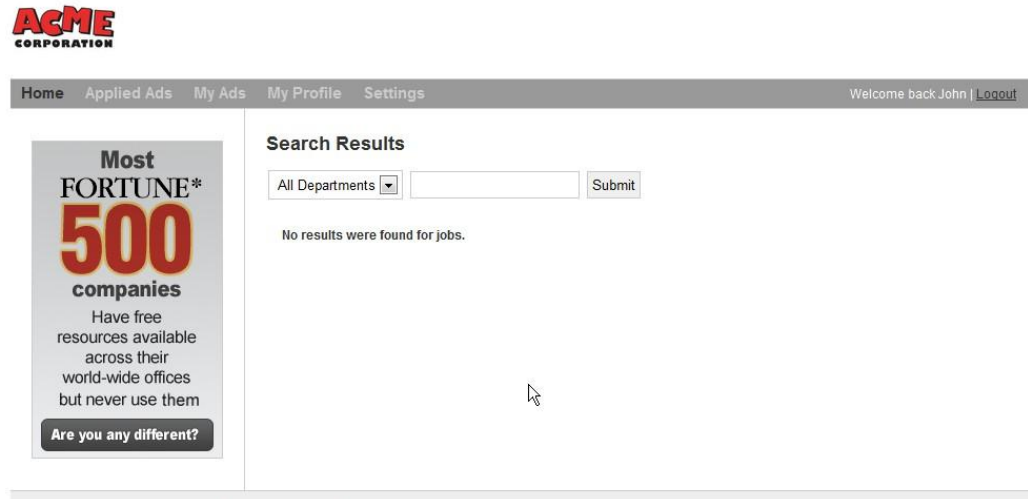
System Requirements

Go Insource is a hosted solution, so the system requirements are minimal. All you need is a good connection to the internet and a web browser. IE7 or higher works but for a faster experience we recommend Chrome, Firefox 3.5 (or above) or Safari.

User Definable Options

Initial Login

When you first login you will see the basic site which now needs to be configured to fit with your business. This configuration needs to be completed by a user with a “Company Admin” profile (more on the profiles later in this guide)



Click “Settings” on the top navigation bar.

This will take you to the user definable options that are available: Departments, Locations, Priorities, Skill Levels and User Licences.

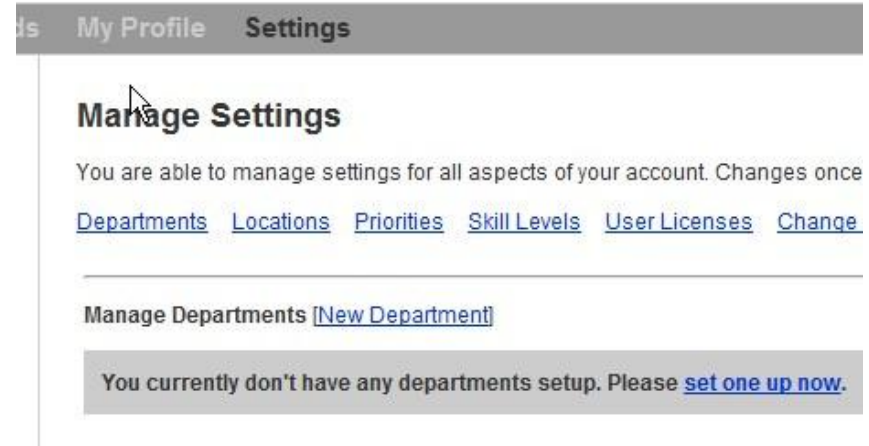
You can also change your password from this screen.

TIP: Take a moment to change your password now. Make sure it's one you can remember!

Departments

Departments

Click on “Departments” and then **[New Department]** to start adding the departments within your company.



Create a new department

Name:

Head:

Show:











Add the department name and then select the department head from the drop down menu (this can only be the initial user until additional users are added - it can be updated later).

Next, select whether to show the department or not and click “Add Department”

See example on the following page.

Departments Example

Manage Departments [New Department](#)

Name	Active Status	Department Head	
Admin	Yes	Mark Smith	 
Commercial	Yes	Jan Smith	 
Marketing	Yes	Kate Jones	 
Sales	Yes	Kate Jones	 
Technical	Yes	Mark Smith	 

Edit Department

Name:

Head:

Show:

The dashboard shows key information for each of the departments and provides the options to edit or delete a department.

The edit department field shows when you click on the pencil icon next to the relevant department

TIP: Think carefully about the level of department you should add. As a starting point add departments at the highest level

Locations











Locations

Click on “Locations” and then start adding your office locations.

Start by adding the Country locations – these will be your “Parent” locations. Next, add in the regional branch office locations (Example setup below)

Example

Manage Branch Locations [[Create a new location](#)]

Branches/Locations		
London		
England		
Hawaii		
Washington DC		
United States		

My Profile Settings

Manage Settings

You are able to manage settings for all aspects of you

[Departments](#) [Locations](#) [Priorities](#) [Skill Levels](#)

Manage Branch Locations [[Create a new location](#)]

Setup a new branch location

Parent Region:

This is a parent location

Branch Location:

Add new location

TIP: Make sure you include all your branch office locations

Priorities

Priorities

Priorities are used when advertising work. You can set up as many priorities as required to fit your organisation by clicking on [Define new]. Be careful not to make this structure too complicated (2 or 3 are best).

Priorities should be added in order from highest to lowest. The first priority you define will be presented first when the ads are shown on your home page.

[My Profile](#) [Settings](#)

Manage Settings

You are able to manage settings for all

[Departments](#) [Locations](#) [Priorities](#)

[Manage Priorities](#) [[Define new](#)]

[Manage Priorities](#) [[Define new](#)]

Label	Show Status	Order	
Urgent	Yes	1	 
Normal	Yes	2	 
Planning in Progress	Yes	3	 

TIP: Enter in priority order and make sure the first entry is your highest priority i.e. URGENT

Priorities Example

Manage Priorities [[Define new](#)]

Label	Show Status	Order	
Urgent	Yes	1	 
Normal	Yes	2	 
Planning in Progress	Yes	3	 

Priorities

We have used 3 Priorities;

- Urgent
- Normal
- Planning in Progress

All ads with a priority of “Urgent” will be displayed first on the home page to ensure visibility.

In our example, we have added “Planning in Progress” to assist with resource planning e.g. you may require a specialist skill set for a project you are bidding on. Use this option to gather interest in your requirement while it is still in the planning / bidding stage.

TIP: The priority assigned to your add can be updated at any stage by editing the advert.

Skill Levels

Skill Levels

Skill levels are used on your profiles and within the search functions. They are designed to allow / encourage a level of standardisation across your company.

Some companies already have skill levels defined with specific requirements for each level - these can be entered here or you can create a generic standard for your business.

The skill levels should be entered in the order that you want them displayed e.g. “Lowest to Highest” or “Highest to Lowest”.

Manage Settings

You are able to manage settings for all aspects of your account. Changes once made cannot be reversed.

[Departments](#) [Locations](#) [Priorities](#) [Skill Levels](#) [User Licenses](#) [Change Password](#)

Manage Skill Levels [[Add new skill level](#)]

Skill Level		Create a new level
	 	Level: <input type="text"/>
<input type="button" value="Create new Skill Level"/>		

Skill Level Example

Manage Skill Levels [[Add new skill level](#)]

Skill Level	
Level 1 / Graduate	 
Level 2 / Junior	 
Level 3 / Mid level	 
Level 4 / Senior	 
Level 5 / Expert	 

Skill Level

We have used 5 skill levels which can be used generically across both Technical and Non-Technical departments.

TIP: The Skill Levels will be displayed across your site in the order that they have been created in

User Licences

User Licences

This is where you can add and manage access for the users within your business. Simply click on [add new user] to add a new user.

When you are setting up a new user you will need to assign an access level (this can be changed at a later date if required).

There are 4 levels to choose from;

- Company Admin
- Department Admin
- Normal User
- View Only User

(these are described on the next few pages)

Department: Technical ▼

Access Level: View Only User ▼

Current Status:

- Select One
- Company Admin
- Department Admin
- Normal User
- View Only User

A screenshot of a user creation form. It features three dropdown menus. The first is labeled 'Department' and has 'Technical' selected. The second is labeled 'Access Level' and has 'View Only User' selected. The third is labeled 'Current Status' and has a list of options: 'Select One', 'Company Admin', 'Department Admin', 'Normal User', and 'View Only User'. The 'View Only User' option is highlighted in blue, indicating it is the selected or active choice.

User Licences – Access Levels

Company Admin

The Company Admin is the most powerful user and has access to;

- All user definable options (Departments, Locations, Priorities, Skill Level and User Licences)
- Change their own password and all users passwords across the company
- Create adverts
- Create profiles
- Apply for Ads
- See who is available for extra work

This access should be given to only a few trusted people within the company.

Department Admin

The Department Admin is the next most powerful user and has access to;

- Many user definable options (Priorities, Skill Level and User Licences)
- Change their own password and user passwords within their department
- Create adverts
- Create profiles
- Apply for Ads
- See who is available for extra work

This access should be given to 1 or 2 senior users within each department.
(dependant on the size of your business)

TIP: The Company Admin user has access to change the look and feel of your site. Use this access level carefully.

User Licences – Access Levels

Normal User

The Normal User is a useful profile for people who can actively manage their own time or for resource managers, with access to;

- Change their password
- Create adverts
- Create profiles
- Apply for Ads
- See who is available for extra work

View Only User

The View Only user has limited access and can be given out to users who will actively look for opportunities but do not manage their own time i.e. they report through to a resource manager or team leader.

They have access to;

- View Adverts
- See who is available for extra work

TIP: The Normal user profile is great for Resource Managers and Team Leaders who manage their teams time.






User Licence - Dashboard

User Licence Dashboard

Manage User Licenses [[Add new user](#)]

Showing 5 out of a total of 15 licenses available to Startup Demo [Request more licenses](#)

Lookup a user: and/or by department and/or by access level

Name	Department	Position	Level	Status		
Mark Smith	CEO	Management Team	Company Admin	Active	Edit	
Jan Smith	Marketing	Marketing Manager	Department Admin	Active	Edit	
Bob Parker	Admin	Admin Team Leader	Department Admin	Active	Edit	
Kate Jones	Technical	Technical Manager	Department Admin	Active	Edit	
Shaun Henry	Technical	IT Project Manager	Normal User	Active	Edit	

The dashboard;

- Provides a “quick search” function to allow easy management of your users
- Shows high level details of the current users in your system
- Shows the number of licences used from your total licence allocation
- Provides a quick method of blocking and un-blocking a users access with the simple click of a button. To block a users access click on the stop sign next to their name (it will then turn into a tick icon) – Click the tick to re-instate access

Editing a User

User Licence Dashboard

Click the pencil icon in the user licence dashboard to edit a user.

You will be presented with the screen to the right and can then change any of the information in the available fields.

Press “update user” to save the changes.

Manage Settings

You are able to manage settings for all aspects of your account.

[Departments](#) [Locations](#) [Priorities](#) [Skill Levels](#) [User Li](#)

Add a new user

First Name:

Last Name:

Email Address:

Position:

Password: [Change Password](#)

Department:

Access Level:

Current Status:

The End

Please [contact us](#) if you have any comments or suggestions

