

Getting started with the e-c toolset

How to add and edit Users.

Overview

The e-c toolset is an extremely flexible toolset that can be used for a variety of communication functions.

This document contains information on how to set up an e-c User.

Login to the admin system

at the following web address with the Username and password that has been sent to you

www.e-c.co.nz/admin/

Hint: - You may want to bookmark this page as this is the page you will use every time you want to edit your web site.

Result: - This will load the main admin menu







































The main admin menu

Is pictured on the following page. You may not see some of the menu options, as some of these are available to administrators only. If after reading this you wish to use any of the functions that you do not have then please contact us at e-c on info@e-c.co.nz.

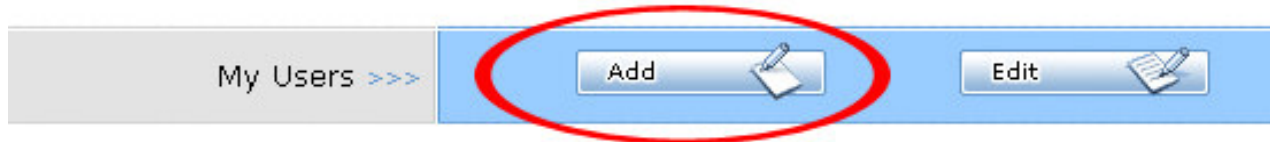
On the next page is a shot of all the functions that the e-c Toolset has available



Above is an example of the login screen it is important that you login to the e-c toolset area and not the web stats login.

My Details >>>	Edit 	
Users >>>	Add 	Edit 
Editor >>>	Add/Edit 	The Editor is not supported in Firefox. The New Editor, below, is supported in Firefox.
New Editor >>>	Add/Edit 	Get Firefox with Google Toolbar
My News >>>	Add 	Edit 
Forum >>>	Add 	Edit 
Dynamic Content >>>	Add 	Edit 
Members List >>>	Add 	Edit 
Mailroom >>>	Create Email 	Send Email 
Template >>>	Add 	Edit 
Help >>>	Add 	Edit 
External Link >>>	Add 	Edit 
Industries List >>>	Add 	Edit 
Meeting List >>>	Add 	Edit 
Event Calendar >>>	Add 	Edit 
Available Event Source >>>	View 	
Shopping >>>	Add/Edit 	
Services Job >>>	Add/Edit 	
Gallery >>>	Add 	Edit 
Dynamic Form >>>	Add 	Edit 
Track Reports >>>	View 	
File Size Reports >>>	View 	
Search Reports >>>	View 	
Miscellaneous >>>	Add/Edit 	

My Users



To start with I am going to look at the add function of the My Users ability in the toolset. Later on we will look at the edit function.

A User is someone who has the ability to login to the e-c toolset and use the functions that you have allocated to them, this can restrict them to only being able to use specific functions or it can allow them to edit and access all functions of the e-c toolset. For example you may have many departments with in your company and you might assign a different User to each department. You could then allow them access to only the sections of the web-site that are relevant to their department you may also want to give them the ability to edit the relevant pages but not to publish them. Publishing the pages could be the job of another User or left up to your operators or yourself. So sounds confusing but its really quite simple take your time to read through this document and we will show you how this function works.

On the next two pages are examples of what you should see once you have clicked on the My Users function of the toolset.



Add User

Logged in as... play@e-c.co.nz in www.e-c.co.nz/playsite

Main Menu

Help?

Logout

* Login Name...	<input type="text"/>	(Fields marked with an * are required)
* First Name...	<input type="text"/>	
* Last Name...	<input type="text"/>	
* Password...	<input type="password"/>	
* Email...	<input type="text"/>	
* Contact Person...	<input type="text"/>	
* Phone...	<input type="text"/>	
* MobilePhone...	<input type="text"/>	
Description...	<input type="text"/>	
Logout Redirect URL ...	<input type="text"/>	
* Editor Access...	<input type="checkbox"/> playsite/extra	<input type="text" value="Publisher (Add,Edit,Publish Pages)"/>
	<input type="checkbox"/> playsite	<input type="text" value="Publisher (Add,Edit,Publish Pages)"/>
	<input type="checkbox"/> playsite/members	<input type="text" value="Publisher (Add,Edit,Publish Pages)"/>
	<input type="checkbox"/> playsite/offer1	<input type="text" value="Publisher (Add,Edit,Publish Pages)"/>
* Date Start...	Nov	2 2006
* Date End...	Nov	2 2006
* Area Access...	<input type="checkbox"/> Add/Edit User	
Select the areas you wish to grant the user access to...	<input type="checkbox"/> Add/Edit Operators	
	<input type="checkbox"/> Calendar Event	
	<input type="checkbox"/> Create Folder	
	<input type="checkbox"/> Dynamic Form to email	
	<input type="checkbox"/> Editor	
	<input type="checkbox"/> Ecommerce	
	<input type="checkbox"/> Forum	
	<input type="checkbox"/> Gallery	
	<input type="checkbox"/> Link Components	
	<input type="checkbox"/> Manual News	
	<input type="checkbox"/> Meeting List	
	<input type="checkbox"/> Members List	
	<input type="checkbox"/> New Editor	
	<input type="checkbox"/> Services Job	
	<input type="checkbox"/> Small Calendar	

* Template Access... 

Select the template for this user ...

- ☐ Template - Coming Soon
- ☐ Template 1-a
- ☐ Template 1-b
- ☐ Template 1-c
- ☐ Template 10
- ☐ Template 11
- ☐ Template 12
- ☐ Template 13
- ☐ Template 14
- ☐ Template 15
- ☐ Template 16
- ☐ Template 17
- ☐ Template 4-c
- ☐ Template 5-a
- ☐ Template 5-b
- ☐ Template 5-c
- ☐ Template 6-a
- ☐ Template 6-b
- ☐ Template 6-c
- ☐ Template 7-a
- ☐ Template 7-b
- ☐ Template 7-c
- ☐ Template 8-a
- ☐ Template 8-b
- ☐ Template 8-c
- ☐ Template 9

[Back to Top](#) 

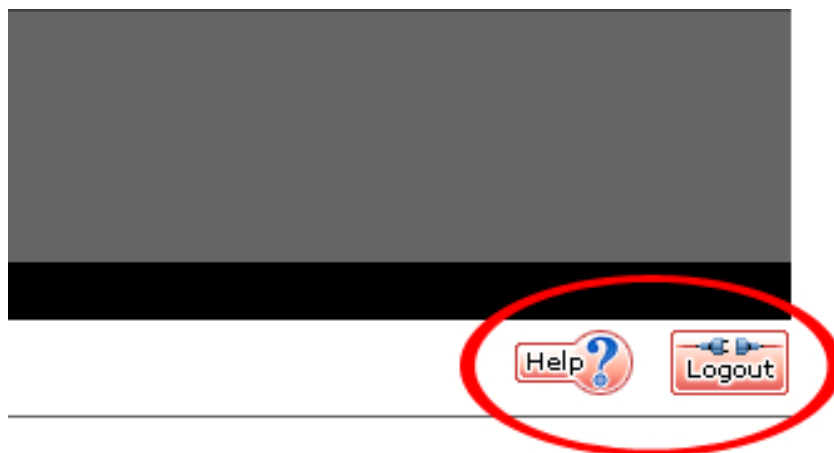
So this is the screen that you should see once you have clicked on the add button next to the MY USER'S function. **Note:** Some of the functions on this page will not be available to you until you purchase them, to do this contact e-c at info@e-c.co.nz

My Users



If you have entered the My Users area and no longer wish to be here then click the Main Menu button to go back to the main admin menu as shown in the circle above.

Logout and Help Buttons



If at any stage you want to logout of the e-c toolset click the logout button located in the top right hand corner this will log you out of the e-c toolset. Another function available to you is the help icon, this gives you general tips that will help you out if you get stuck at all inside the toolset. These buttons are shown in the circle above.

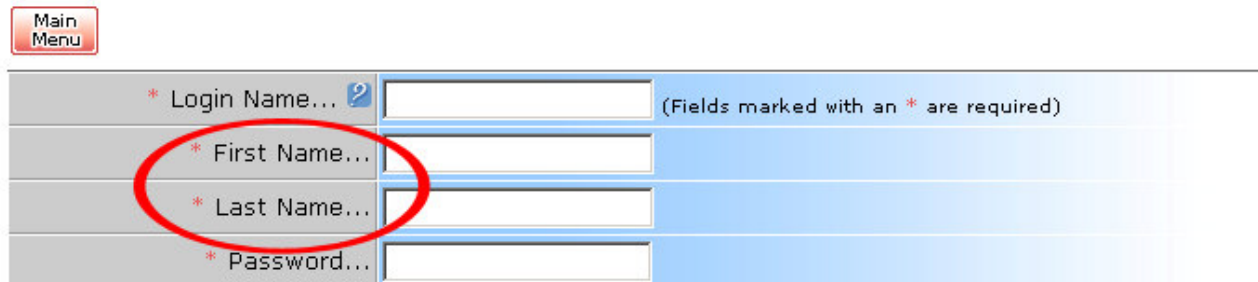
My Users Login Name



The Login name is the name that you will assign to the User so that they are able to access the toolset, this will enable your User to login to e-c at the main login screen. The Login name could be their email address or you may want to give the User themselves the option of creating their own login name (It makes sense to make the login name the Users email address to begin with as the login name can be changed at a later date if it needs to be.) You will need to add this data in the text field next to the login name heading as highlighted in the circled above.

Note:- This is a required field. The login name must not contain any spaces and is case sensitive.

First and Last Name.

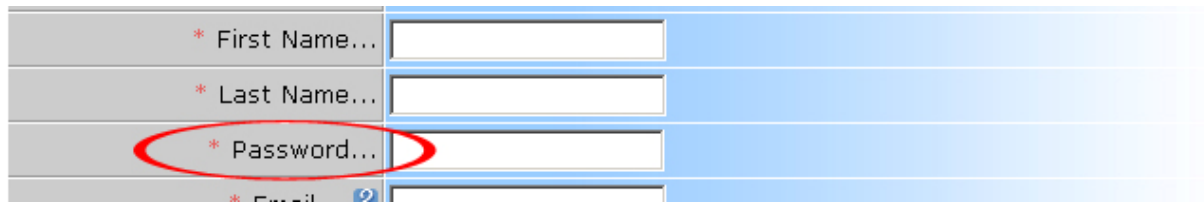


In these areas you will need to add the first and last name of your Users. As you are able to set up more than one User this is the best way to keep track of who has what functions and will make it easy for you to change and edit each User's details.

You will need to enter this information into the text boxes titled First name... and titled last name.... as highlighted in the circle above.

Note:- This is a required field. Remember you are able to edit Users once they are set up which enables you to take away or give them more responsibilities as you see fit.

Password



A screenshot of a registration form with a light blue background. It contains four rows of input fields. The first row is labeled '* First Name...', the second '* Last Name...', the third '* Password...', and the fourth '* Email...'. The 'Password...' label and its corresponding input field are circled in red. Each input field is a white rectangle with a thin border.

The Password along with the Username is used so that the User can access the toolset.

The password is first set up by you and you will need to enter this information into the text field provided next to the password heading as highlighted in the circled above.

Note:- This is a required field. Passwords are case sensitive and also no spaces are allowed when creating a password. It is a good idea to use both numerals and letters when creating a password.

Email

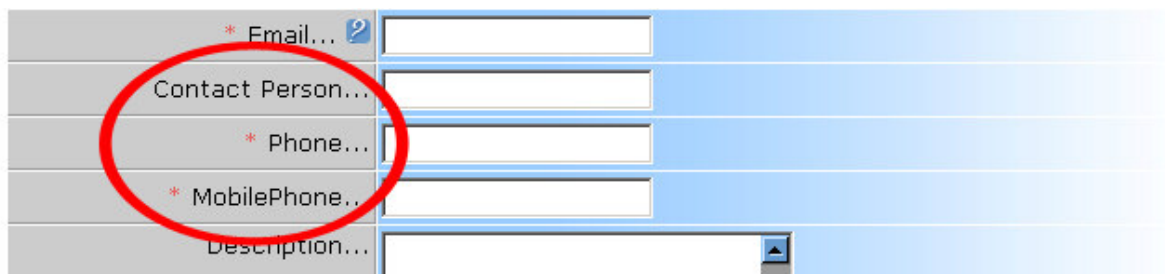


A screenshot of a registration form with a light blue background. It contains four rows of input fields. The first row is labeled '* Last Name...', the second '* Password...', the third '* Email...' with a small blue question mark icon, and the fourth '* Contact Person...'. The 'Email...' label and its corresponding input field are circled in red. Each input field is a white rectangle with a thin border.

The email area is usually the same as the login name. It makes sense if the User login name and the email address are the same to begin with. Enter this information in the text field provided next to the email heading as highlighted in the circled above.

Note:- This is a required fields.

Contact Person



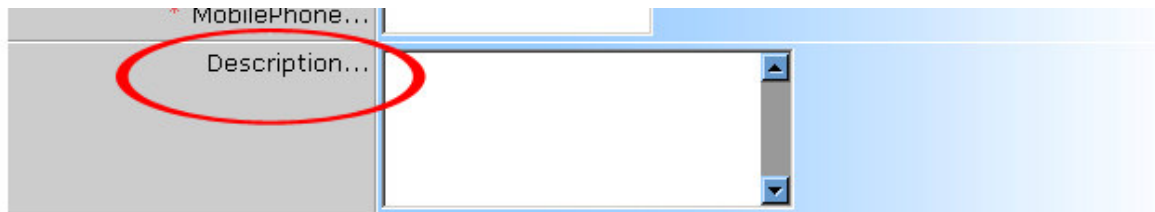
A screenshot of a registration form with a light blue background. It contains five rows of input fields. The first row is labeled '* Email...' with a small blue question mark icon. The second row is labeled 'Contact Person...', the third '* Phone...', the fourth '* MobilePhone...', and the fifth 'Description...'. The 'Contact Person...', 'Phone...', and 'MobilePhone...' labels and their corresponding input fields are circled in red. Each input field is a white rectangle with a thin border.

The contact person is the person who you have set up inside e-c to be your User of the toolset. Enter in the relevant data in the text fields provided for Contact Person, Phone and Mobile Phone number as highlighted in the circle above. If your User only wants to include their phone number just place a full stop in the mobile phone text field.

Note:- This is a required field

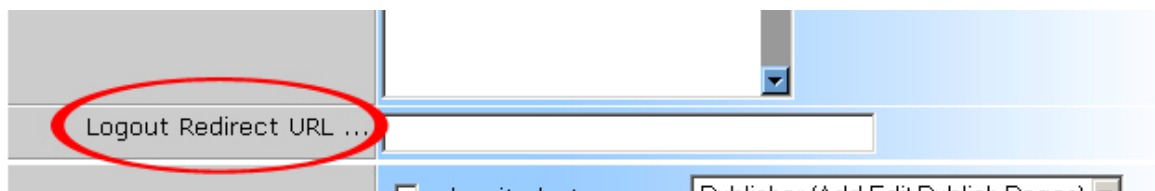
For a free demo see - www.e-c.co.nz
Phone +64 6 867 7660 Fax +64 6 867 7143

Description

A screenshot of a web form. The label 'Description...' is circled in red. To its right is a large, empty text area with a vertical scrollbar on the right side. Above the label, the text 'MobilePhone...' is partially visible.

The description is an area where you can leave any notes you would like about the User or anything else that you see fit. To add a description full in the text field located next to the description heading as highlighted above.

Logout Redirect

A screenshot of a web form. The label 'Logout Redirect URL ...' is circled in red. To its right is an empty text input field. Below the input field, there is a dropdown menu with the text 'Publisher (Add,Edit,Publish Pages)'.

This lets you change where your Users will be redirected to when they logout of the e-c toolset. If you leave this area blank they will be logged out to the e-c main login window.

If you want your User to go to another location you will need to enter it into the text field next to the logout redirect URL which is highlighted in the circle above.

Publisher

A screenshot of a web form. The label 'Editor Access...' is circled in red. To its right is a list of four items, each with a checkbox and a dropdown menu. The items are: 'playsite/extra', 'playsite', 'playsite/members', and 'playsite/offer1'. Each dropdown menu has the text 'Publisher (Add,Edit,Publish Pages)'. Below the list, there is a label 'Data Start' followed by a date field showing 'Nov 12 2006'.

In this area you can choose what sections you would like your editors to look after by clicking the appropriate check boxes. A check box that has a tick in it will mean that the User is able to edit this section. So if you would like the User to have access to all the sections tick all the boxes, if you would only like them to have access to some of the sections then only click the sections that you want them to be able to edit. If you do not change the drop down menu next to the boxes then the User will be a publisher which means that they can edit the sections and publish them making them live on the website.

Editor

Logout Redirect URL ...

* Editor Access...

☐ playsite/extra Publisher (Add,Edit,Publish Pages)

☐ playsite Publisher (Add,Edit,Publish Pages)

☐ playsite/members Publisher (Add,Edit,Publish Pages)

☐ playsite/offer1 Publisher (Add,Edit,Publish Pages)

* Date Start... Nov 3 2006

* Date End... Nov 3 2006

Editor (Add,Edit only)

You can make a User an editor by clicking the drop down menu and selecting editor as is highlighted in the circle above, you will find that the User is only able to edit the sections but will not be able to publish them. This enables you to check the content for mistakes and to ensure that nothing offensive is published.

Date Started and Date ended

☐ playsite/members Publisher (Add,Edit,Publish Pages)

☐ playsite/offer1 Publisher (Add,Edit,Publish Pages)

Date Start... Nov 3 2006

* Date End... Nov 3 2006

* Area Access... Add/Edit User

Select the areas you wish to grant

Highlighted above is the area where you can add a start and end date for a specific User. This enables you to add a User for a set period of time, when the date ended runs out then the User will no longer be able to access the Toolset. The same applies with the date started area; the User will not be able to start using the toolset until the appropriate date has started.

Area Access

* Area Access...

Select the areas you wish to grant the user access to...

☐ Add/Edit User

☐ Add/Edit Operators

☐ Calendar Event

This area enables your Users access to the specific functions inside the e-c toolset. I will also give you a brief description of each function that your User can gain access to. It is a

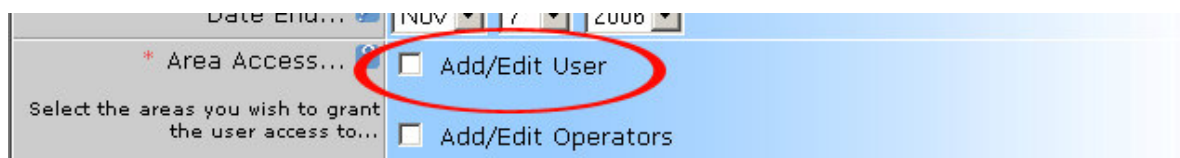
very simply system and all that you need to do is check the check box next to the function you would like the User to be able to access.

If you would like a more detailed guide to each function then I suggest you go to the e-c help area and download the specific toolset function you would like more information about. Visit www.e-c.co.nz/help.

If you do not have some of the functions and would like to allow your User access to these functions please contacts us at info@e-c.co.nz.

Area access functions

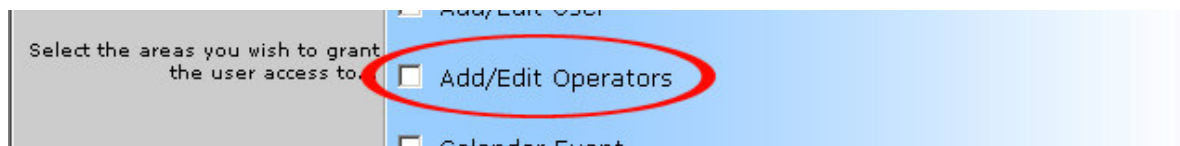
Add/Edit User



This function is exactly like what we have been talking about through this help document. It allows your User to add and edit their own Users.

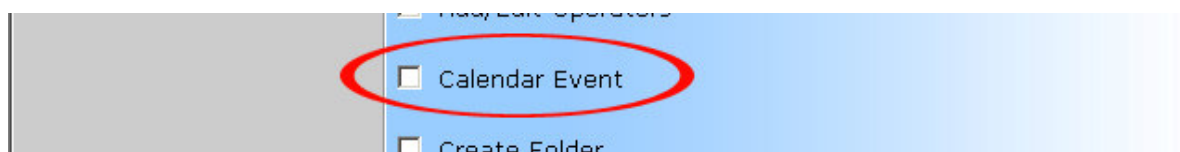
Allow this function by checking the check box next to the add/edit Users heading as highlighted in the circle above.

Add/Edit Operators



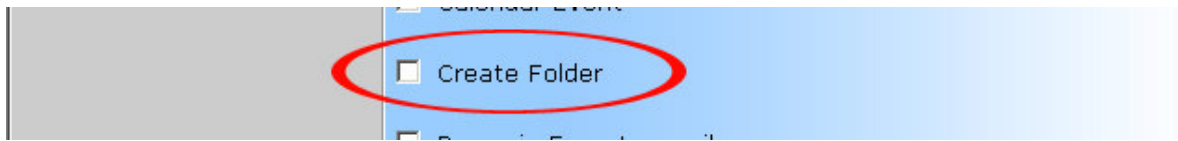
This function will enable your User to add and edit Operator Users. Allow this by checking the check box next to the add/edit operators heading as highlighted above.

Calendar Event



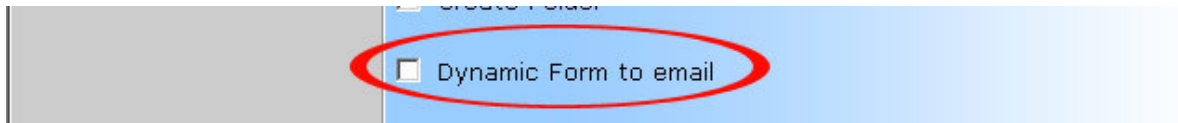
This enables your User to have access to the calendar event function. To enable this check the calendar event check box next to the calendar event heading has highlighted above.

Create Folder



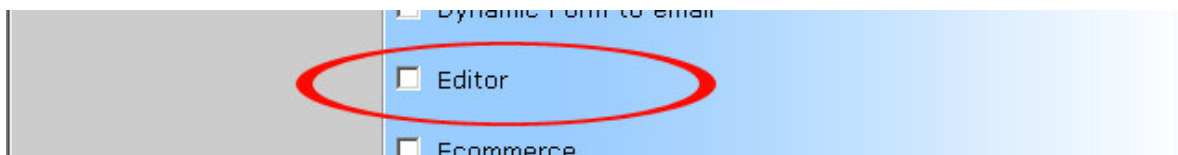
This will enable your Users to create folders inside the e-c Toolset. To enable this check the calendar event check box next to the create folder heading as highlighted above.

Dynamic Form to Email



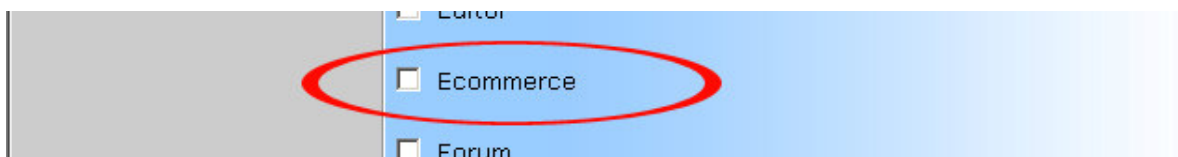
This will enable your Users to create dynamic forms to email. To enable this you will need to check the check box next to the Dynamic form heading, as highlighted above.

Editor



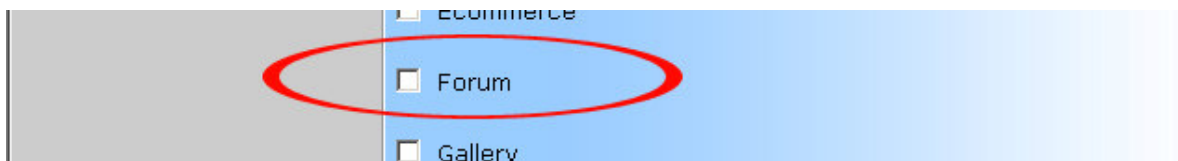
This will enable your Users to edit and maintain the data on your pages. To enable this check the check box next to the editor heading as highlighted above.

Ecommerce



This enables the User to access the ecommerce function of the toolset. To enable this check the check box next to the ecommerce heading as highlighted above.

Forum



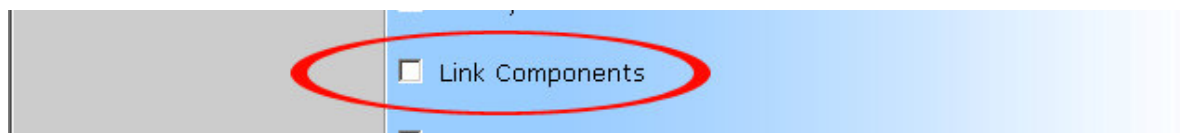
This will enable your User to have access to the forum function. To enable this check the check box next to the forum headings highlighted above.

Gallery



This will allow your Users access to the gallery function. To enable this check the gallery check box next to the gallery heading as highlighted above.

Links Component



This will enable your User's access to the links component of the toolset. To enable this check the check box next to the link component heading as highlighted above.

Manual News



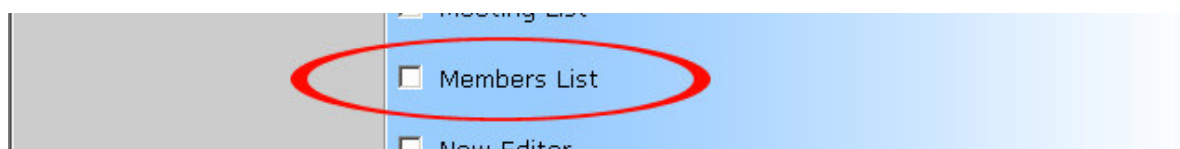
With this component your Users will be able to add and edit manual news. To enable this check the check box next to the manual news heading as highlighted above.

Meeting List



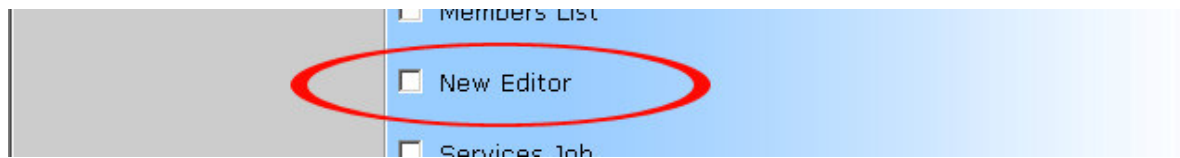
With this component your User will be able to add and edit the meeting list function. To enable this check the check box next to the meeting list heading as highlighted above.

Members List



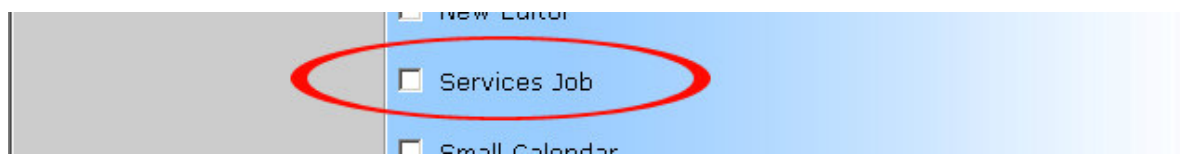
This function allows your Users to edit the members lists section of e-c. To enable this check the check box next to the members list heading as highlighted above.

New Editor



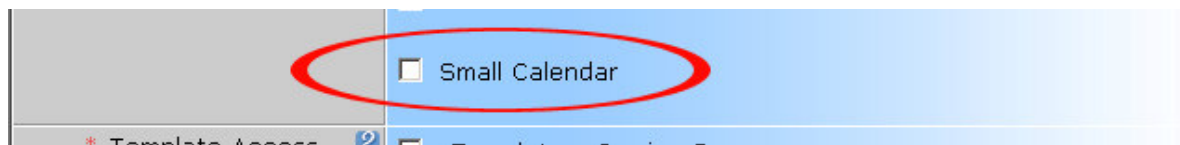
This will allow the User access to the New Editor. To enable this check the check box next to the new editor heading as highlighted above.

Service Jobs



This will allow your Users access to the service jobs function. To enable this check the check box next to the new editor heading as highlighted about.

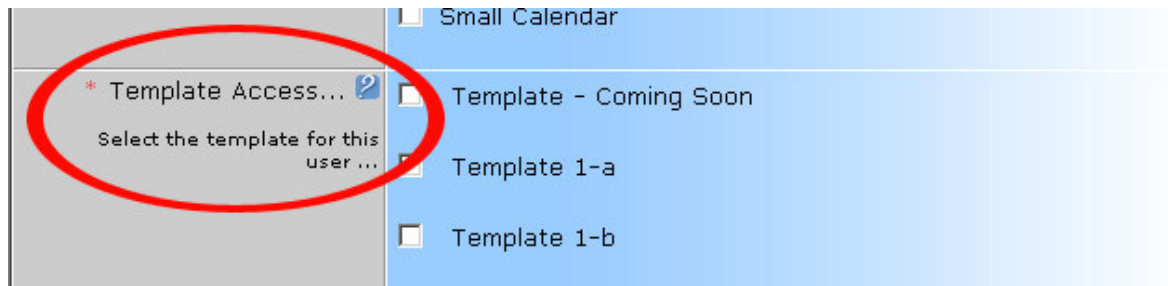
Small Calendar



This function allows your Users access to the small calendar function. To enable this function check the check box next to the small calendar heading as highlighted above.

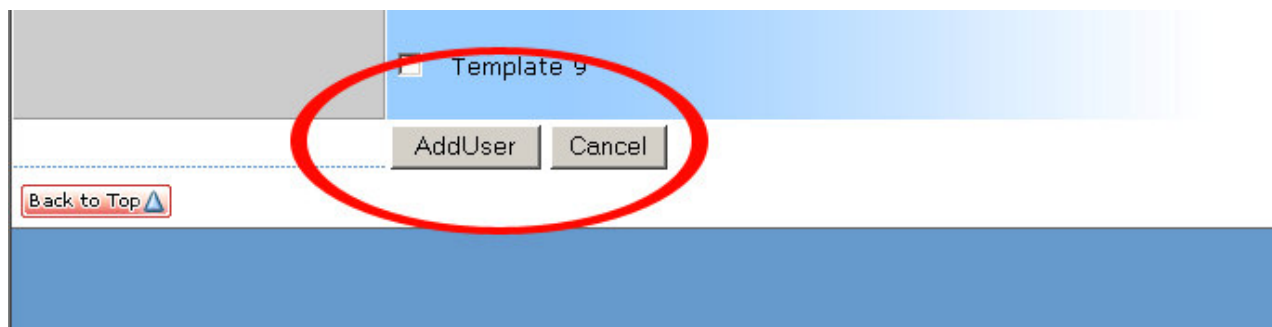
As I have outlined above there are a lot of options available when setting up your Users you do not have to use them all and you can make it so that even though they are able to access the functions they are only editors, which means that they will not be able to make the final decision on the updates they have made. This may be left up to someone else. Another option is that you give the User access to all the functions, but restrict them too only being able to edit a single page on the web-site. There are a lot of options and they are all completely under your control.

Template Access



This area lets you control the template access that your Users will use to update your site. If you don't want your Users to change the look of your site then only give them access to the main template, However if you would like your User to be able to control the way the over site looks then give them access to all of the templates once again you are in control of this. To allow a User accesses to a template check the check box next to the appropriate template heading.

Confirming User



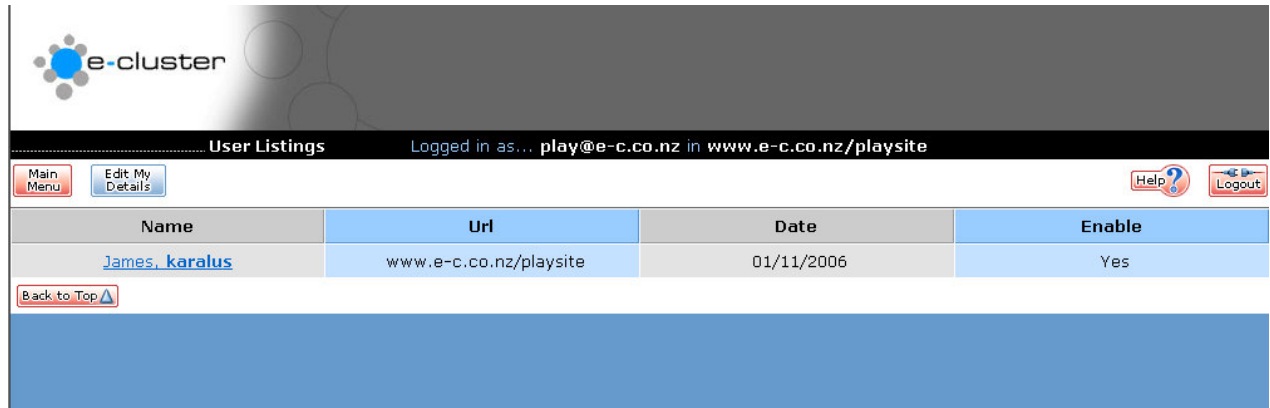
Once you feel that everything is good to go and all the required fields have the correct data in them you can either confirm that it is all ok by clicking the add User button which will add the User to your site, or you can click the cancel button which will take you back to the main menu screen. This is highlighted above.

Note: - Make sure all your fields are filled in correctly or you will have to do this all over again from the start. Not very fun.

Edit My Users

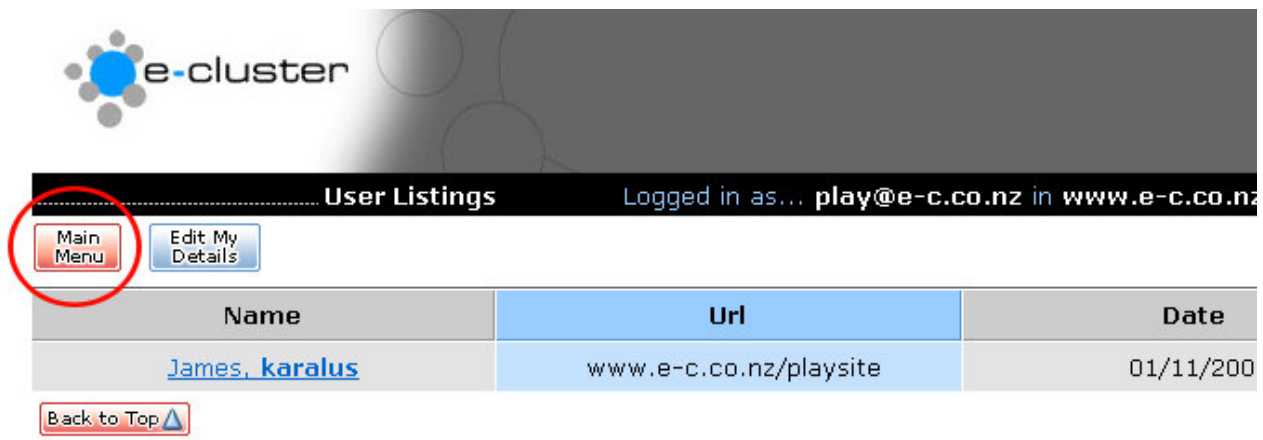


Now we are going to look at the editing of the Users that you have set up. You will need to click the edit button which is highlighted above. This will take you to the main screen where your Uses should be located. User are sorted in alphabetical order by their last names.

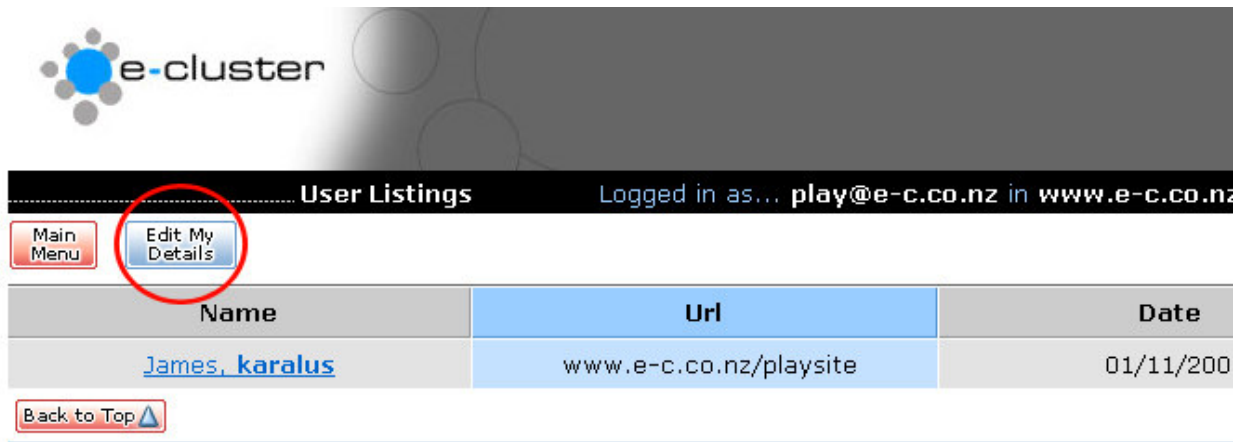


Above is the screen you should see once you have click the edit User button.

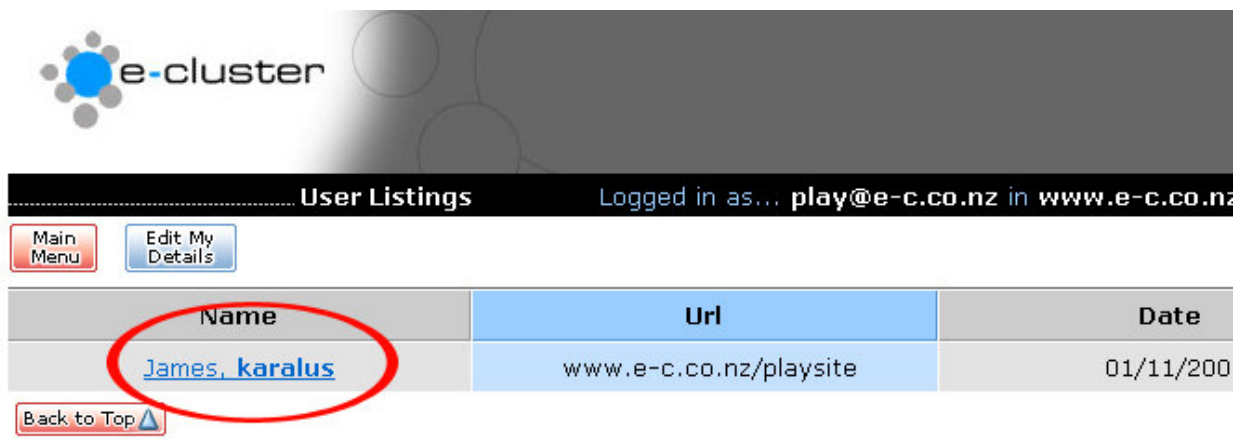
Areas To Note.



If you have accessed the edit Users screen and no longer wish to be here then click on the main menu button this will take you back to the main e-c menu. This button is highlighted in the image above.



Pictured above is how you access the option of editing your details. Highlighted above is the button you will need to click on in order to access the "My details" screen. Have a look at the "My details" help doc to find out more information about this.



To edit a User is really very simple. Click on the Users name and you will be taken to the edit Users main menu, which is exactly like the add User screen except the fields will contain your Users information. From here you are able to add, restrict or change the Users information. It is exactly the same as what we covered above so if you get stuck go back through this document and you should be able to locate your answers.

We hope that the above has given you a good overview of what is possible with the e-c toolset. What's more you can even try it out for yourself completely free.

Simply visit our website to find out how www.e-c.co.nz

Or contact us on:-

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