REMOTEXS ADMIN GUIDE
## CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>3</td>
</tr>
<tr>
<td>Document Overview</td>
<td>3</td>
</tr>
<tr>
<td>Admin Common Tasks via dashboard</td>
<td>3</td>
</tr>
<tr>
<td>Admin Dashboard</td>
<td>4</td>
</tr>
<tr>
<td>Main Elements of the RemoteXs Portal</td>
<td>5</td>
</tr>
<tr>
<td>Manage Content</td>
<td>6</td>
</tr>
<tr>
<td>Content – Database/E-Resources</td>
<td>7</td>
</tr>
<tr>
<td>Add or Edit Database/E-Resource</td>
<td>8</td>
</tr>
<tr>
<td>Content – Biblio</td>
<td>11</td>
</tr>
<tr>
<td>Add or Edit Biblio</td>
<td>12</td>
</tr>
<tr>
<td>Content – Tutorial</td>
<td>13</td>
</tr>
<tr>
<td>Add or Edit Tutorial</td>
<td>14</td>
</tr>
<tr>
<td>Manage Resource Group</td>
<td>16</td>
</tr>
<tr>
<td>Add or Edit Resource Group</td>
<td>18</td>
</tr>
<tr>
<td>Manage User Category</td>
<td>20</td>
</tr>
<tr>
<td>Add or Edit User Category/Group</td>
<td>24</td>
</tr>
<tr>
<td>Manage RemoteXs User</td>
<td>26</td>
</tr>
<tr>
<td>Add or Edit Single RemoteXs User</td>
<td>29</td>
</tr>
<tr>
<td>RemoteXs Mail Logs</td>
<td>31</td>
</tr>
<tr>
<td>Usage Reports</td>
<td>32</td>
</tr>
<tr>
<td>Support Contact Details</td>
<td>33</td>
</tr>
</tbody>
</table>
INTRODUCTION

DOCUMENT OVERVIEW
This document aims to clearly explain the common routine task that the Administrator may have to perform for the updates on the RemoteXs portal or monitor the usage. This may contain activities such as managing users, managing content, managing user categories, managing resource group etc.

ADMIN COMMON TASKS VIA DASHBOARD
Dashboard is designed to quickly access the common functionality that the admin may want to perform. Depending on the customization carried out for the Customer, Dashboard may have some variations.

Admin can have quick access to:

- Number of registered users that are active on the portal
- Count for the Disabled users accounts
- Users that are pending approval (available only on non-SSO implementation)
- Add Users (available only on non-SSO implementation)
- 10 last new accounts registered on the portal
- Number of concurrent sessions
- Recent Content added to the Portal
- Content Overview
- Link to Create Content

Link to the Usage Reports is also available from the Admin Dashboard.

Using the Service Request option, Admin can send the send request to RemoteXs Support Team.
**ADMIN DASHBOARD**

- **Shortcut Buttons** – Present on all pages Gives quick access to Dashboard, home and logout
- **Navigation Tabs** – Primary navigation tabs to create users, content, user and resource groups
- **User related dashboard shortcuts** – shortcuts for user related functions, Usage reports etc.
- **Content Related Shortcuts** – Shortcuts related to content on this site

Option available only on non-SOO implementation
Main Elements of the RemoteXs Portal

Following are the main elements of the Portal:

- **Content**
  - Databases/E-Resources – These are also the parent resources for other type of Resources such as eJournals, eBooks, Tutorials.
  - Biblio – Biblio content are the resources such as eJournals, eBooks etc.
  - Tutorials – Tutorials are the links to content in YouTube.
  - Announcements – Announcements is the message to users. Announcement can also be targeted to particular category of users

- **Resource Group** – The idea behind resource group is to organize Databases/E-Resources into various groups to manage the access those Databases. E.g. of Resource Groups are Finance Resources, Engineering Resources, Law Resources etc.

- **User Category** – Users can be organized into different user categories. Eg. Of User Categories are Faculty, Student, Staff, Research Staff, Law Faculty, Management Faculty etc. A RemoteXs User can belong to only one user category.

- **RemoteXs User** – RemoteXs User is that user who can login to the RemoteXs Portal and access the Resource to which they have access to.

Note:

*To have User in the Portal, you must have a User Category defined for that user.*

*To have User Category in the Portal, you must have the Resource Group defined for that user category.*

*To have the Resource Group in the Portal, you must have the Content defined in the portal for that resource group.*
MANAGE CONTENT

Admin can manage (Create, Delete, Publish, UnPublish) Content. Admin can also create and update the content via the Bulk upload feature.

By clicking on the “content” tab on the primary navigation tabs, you will reach the content administration module.

The type of content that can created by default are: Databases, Biblio content ( Journals, Ebooks ), Tutorials, Announcements.

Content can be filtered by:

- Published: by default this filter is set to “Yes”. This shows all content which is active. To view, unpublished (in-active) content, set the filter to “No” and click “Filter” button
- Contains: This Contains filter can be used to filter content by the title and description of the Content.

Content Bulk Operations can be performed by:

1) Content items can be selected by checking the check-boxes
2) Selecting the operation to perform from the operations drop down and selecting “Execute” Button

The operations that can be performed are: Delete Item, publish content and Un-publish content
CONTENT – DATABASE/E-RESOURCES

- Content type tabs – Select the type of content to administer (E-resource, Journal, Tutorial)
- Add New Database – Add new single database
- Bulk Import Databases – Bulk Import Databases from excel template
- filtering of content – Filter the content either by published status or by text it contains
- Operations for content – Perform bulk operations on selected content
- Content grid – Content is listed here. Editing can be done by clicking edit. Bulk operations can be performed by selecting check-boxes and selecting the required operation
ADD OR EDIT DATABASE/E-RESOURCE

By Clicking on the “Add new Database” button on the Database content administration page, you will reach the “Create Database” page shown here. The fields to create a database are:

- **Database Name**: add the required database name
- **Database Landing Page**: The URL where the User should land on clicking the URL in the portal (the title for this field is optional)
- **Database Description**: This is the description which the user will see on the detailed page of the Database
- **Tags**: these are tags to classify the database, This is optional but recommended. To add multiple tags, add the tags with a “,” (comma) between tags. Eg “JSTOR, Humanities, Archive”
- **Host/Domain to be Proxied**: This is the setting required for the proxy. This is essential for the resource to work via the proxy. The details of this field are given in the next page.
- **Resource Category**: This is for classifying resources in the front end
- **Authentication Settings**: This is set as “IP authentication” by default. The password based authentication is an advanced topic. This will be configured by the RemoteXs team on request.
- **Saving options buttons**: You can chose to publish (which will save and publish). Save as draft (which will save and not publish) and Preview (Which will show a preview of the page).
Databases Settings: Host/Domain to be Proxied

As mentioned earlier, The “Host/Domain to be Proxied” is critical for allowing a resource to be proxied by RemoteXs.

If only one primary domain has to be proxied by the proxy (eg: www.example.com) the rewrite settings has to be set as “proxy only specific host” and the URL has to be set as “www.example.com”.

If a website has other sub-domains which need to be proxied, (eg: aop.oxfordjournals.org, adaptations.oxfordjournals.org, etc) then the re-write settings has to be set as “Proxy all hosts for this domain” and URL has to be set as “oxfordjournals.org”. This will make the proxy fetch pages from all sub domains of oxfordjournals.org

Please note that the “Host/Domain Name” has to be entered without http:// or https://
By Clicking on “Bulk Import Databases” button on the database content admin page, You will reach the database bulk import page. A Excel import template can be downloaded by clicking the link. Once the template has been filled as required, you can upload the file by selecting file and clicking the “import” button.
By clicking on the “Biblio” tab in the content type tabs, you will be taken to the Biblio administration page. Here you can add, edit, filter Journals (And ebooks). The adding, editing, filtering and bulk importing of journals is similar to that of Databases (E-Resources).
ADD OR EDIT BIBLIO

By clicking “Add new Journal” you will land on the page shown above. You will have to select the publication type – which can either be either “journal” or “ebook”. The rest of the fields is dependent on the type. The fields can be filled as required. The required fields are “Title”, “resource URL” (under location tab) and “Parent Resource”.

Step for the Bulk upload of the Biblio Records are same as the Database Content. The value for the field “Type” in the bulk upload excel sheet for different biblio records should be: “100” for Ebook and “131” for Journals.
By clicking on the “tutorial” tab in the content type tabs, you will be taken to the journals administration page. Here you can add, edit, filter tutorials (youtube videos). The adding, editing, filtering of tutorials is similar to that of Databases (E-Resources)
**ADD OR EDIT TUTORIAL**

By clicking on “Add Tutorial” button on the Tutorial content admin page, you will reach the “create tutorial” page. The fields required are: Title, Web Media, Body, Tags. The web Media is the URL of the youtube video. After filling the details, select Publish to save and publish the tutorial. To link the tutorial to Databases, enter the Database Name value in the Parent Resource.

Upon clicking the browse button for Web Media, a modal dialog box will open to enter the URL for the Media resource.
Enter the URL for tutorial media resources. Currently it only support the YouTube videos.
MANAGE RESOURCE GROUP

Resource groups are used to group proxy resources. This is useful to restrict access to particular resources to particular user groups. For example: you can make a “Faculty Resources” group and add resources which should be assigned only to faculty user category.

Admin can assign multiple resource group to one user category.

For example:

Admin can create resources groups such as

- “Common Resources” group for resources which everyone has access
- “Faculty Resources” group for resources which only Faculty may have access.
- “Research Resources” group for resources which only Faculty and Researcher may have access.

Admin may then assign

- “Common Resources” group to all user categories.
- “Common Resources” and “Research Resources” to user categories who are involved in Research
- “Common Resources”, “Research Resources” and “Faculty Resources” to Faculty user categories who are involved in Research.

Note: Resource groups are just only for admin to organize resources into groups for making the access control simple. The Resource groups are not used anywhere in the usage reports nor the users can know what resource groups they have access to.
- **Add New Resource group** – To add a new Resource Group
- **Bulk Import Resource Groups** – Bulk import groups with excel template
- **Filter by group name & description** – to filter the list of groups
- **Operations** – bulk operations for resource groups
- **Grid** – The list of resource groups, multiple can be selected by selecting checkboxes and selecting the required operation
**Add or Edit Resource Group**

Name of the resource group to create

Resources Available – Attach resources available in this resource group (select multiple). Once selected, the item turns gray in dropdown.

Description of the resource group
By Clicking on “Bulk add Resource Group” button on the Resource Group admin page, You will reach the Resource Group bulk import page. A Excel import template can be downloaded by clicking the link. Once the template has been filled as required, you can upload the file by selecting file and clicking the “Import” button.
**Manage User Category**

The terminologies “User Group” and ‘User Category” are interchangeably used in the RemoteXs Portal, though both means the same thing.

By clicking on the “User Groups” tab in the primary navigation tab, you will reach the User Category/Group administration module

- User Category/Group are used to group users into a particular category. Eg: students, Faculty etc.
- User Category/Group allow admin to set a Daily data download limit, account expiration date etc for particular user group
- User Category/Group are also used for generating category based usage reports
- Resource Groups are added to User Category to allow users access to a set of resources (databases)

The “User Category” may have to be defined depending on the implementation.

In general, the “User Category” name can be defined based on what admin wish to.

For Example: “Faculty”, “Student”, “Staff”

Admin manually assigns this category to the RemoteXs User in the Portal.

But in case of Single-Sign On or External Authentication implementation, where the user information comes from the external authentication system, “User Category” name has to be defined such that user can be automatically mapped to the right User Category.

Here, “User Category” needs to be defined as comma separated value of multiple attribute that can be received as part of user information during the authentication process. Order in which the attribute value is used for defining the “User Category” is predetermined with the consent and understanding of the Customer.
Example 1: Attribute used for mapping the user to “User Category” are: “Batch”, “Department”, “User Type”

“User Category” values may be:

<table>
<thead>
<tr>
<th>Mechanical, Faculty</th>
<th>Aeronatics, Faculty</th>
<th>Ph.D, Student</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mechanical, Staff</td>
<td>Aeronatics, Staff</td>
<td>Faculty</td>
</tr>
<tr>
<td>2015, Mechanical, Student</td>
<td>2015, Aeronatics, Student</td>
<td>Common Access</td>
</tr>
<tr>
<td>2016, Mechanical, Student</td>
<td>2016, Aeronatics, Student</td>
<td></td>
</tr>
</tbody>
</table>

Base on the value received from the authentication, the user category may get mapped to the user.

In this case, first User attributes “Batch”, “Department”, “User Type” are tried to be mapped to the User Category value. If found, user is assigned that category.

If not found, then User attributes “Department”, “User Type” are tried to be mapped to the User Category value. If found, user is assigned that category.

If not found, then User attribute “User Type” is tried to be mapped to the User Category value. If found, user is assigned that category.

Let say:

- Values received for User111 are “User111”, “user111@example.org”, “2015”, “Mechanical”, “Student”. User will be mapped to User Category “2015, Mechanical, Student”.
- Values received are “User222”, “user222@example.org”, “2016”, “Aeronatics”, “Student”. User will be mapped to User Category “2016, Aeronatics, Student”.
- Values received are “User2”, “user2@example.org”, “”, “Aeronatics”, “Faculty”. User will be mapped to User Category “Aeronatics, Faculty”.
- Values received are “User43”, “user43@example.org”, “”, “Aeronatics”, “Staff”. User will be mapped to User Category “Aeronatics, Staff”.
- Values received are “User31”, “user31@example.org”, “”, “Civil”, “Faculty”. User will be mapped to User Category “Faculty”.
- Values received are “User432”, “user432@example.org”, “”, “Ph.D”, “Student”. User will be mapped to User Category “Ph.D, Student”.
**Example 2:** Another example for Single-Sign On or External Authentication implementation for a Non-Educational Organization

RemoteXs Portal is authenticated against Customer’s Single-Sign On system, and following attribute of the User are sent to the RemoteXUs Portal post Authentication: UserName, EmailAddress, User Department, User City, Country.

Implementation can be defined such that User can be assigned to User Category based on “User Department”, “User Type”, and “User Organization” by mapping the values received to the User Category name defined in that particular order.

“User Category” values may be:

<table>
<thead>
<tr>
<th>Aviation, Lynn, US</th>
<th>HealthCare, Lynn, US</th>
<th>General Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aviation, Bangalore, IN</td>
<td>Pharmaceutical, Sterling, US</td>
<td>Construction, San Francisco, US</td>
</tr>
<tr>
<td>HealthCare, Bangalore, IN</td>
<td>Pharmaceutical, Florence, Italy</td>
<td>Construction, Ahmedabad, IN</td>
</tr>
<tr>
<td>HealthCare, London, UK</td>
<td>Pharmaceutical, Frankfurt, DE</td>
<td></td>
</tr>
</tbody>
</table>

Let say:

- User1 values are: “User1”, “user1@example.org”, “Aviation”, “Lynn”, “US”
  User will be mapped to User Category: “Aviation, Lynn, US”
- User2 values are: “User2”, “user2@example.org”, “Aviation”, “Bangalore”, “IN”
  User will be mapped to User Category: “Aviation, Bangalore, IN”
- User3 values are: “User3”, “user3@example.org”, “HealthCare”, “Bangalore”, “IN”
  User will be mapped to User Category: “HealthCare, Bangalore, IN”
- User4 values are: “User3”, “user3@example.org”, “Human Resource”, “Bangalore”, “IN”
  User will be mapped to User Category: “General Access”
- User4 values are: “User3”, “user3@example.org”, “Construction”, “Ahmedabad”, “IN”
  User will be mapped to User Category: “Construction, Ahmedabad, IN”
Add new User Category – Add a single user category

- Bulk Import User Categories – Bulk import user categories from Excel Template
- Filter by Group Name – Filter the User groups by name of group
- Operations – Performing operations on the User Groups.
- User Group Grid – The list of user groups. Editing can be done by clicking edit. Bulk operation can be performed by selecting check-boxes and selecting the required operation
The fields to create a user category (user group) are: Name, Category user Expire date – this is the date on which the users of this category will expire, Description, Attached Resource Groups – attach resource groups to which this user group as access to Data Limit – the daily data limit for the users of this category in MB.
User Category/Group Bulk Upload

By Clicking on “Bulk add User Category/Group” button on the User Category/Group admin page, You will reach the User Category/Group bulk import page. A Excel import template can be downloaded by clicking the link . Once the template has been filled as required, you can upload the file by selecting file and clicking the “Import” button.
**Manage RemoteXs User**

By clicking on the “RemoteXs Users” tab on the primary navigation tabs, you will reach the User administration module.

The User administration module is used for managing everything related to users. Tasks such as adding, approving, disabling, deleting, emailing etc can be done with this module.

The user administration module also allows the bulk operation for certain tasks as explain later.

In General, User are created in the RemoteXs portal using the Bulk upload or add Single user entries.

Some Customers may have also opted for Online User Registration process. This may need a user approval process. Auto-approval may have be setup if the email address of the user belongs to Customer’s email address domain. Else, the admin manually approves the user.

Some Customers may have opted for Single-Sign On process or user authentication against their own system. In this case, the user may get created in the Portal upon the first time authentication of the User. Response received from this external authentication system is used to create the user in the system. This system must pass on certain attributes of the user that are mandatory for user creation process. Also, in such cases, “Add RemoteXs User” and “Bulk RemoteXs User Import” features may not be available.
- user status tabs – Select the type of user status to administer (Active, Disabled, Pending, Admin, Mail Logs)

- Add New RemoteXs User – Add new single RemoteXs User *(May not be available in some customer implementation)*

- Bulk Import Users – Bulk Import RemoteXs Users from CSV template *(May not be available in some customer implementation)*

- filtering of Users – Filter users by email, first name, last name and user category.

- Operations for Users – perform bulk operations on selected Users

- User grid – Users are listed here. Editing can be done by clicking edit. Bulk operations can be performed by selecting checkboxes and selecting the required operation

Depending on the Customer’s user process for the Portal, Operations may also have third action “Approve Account”
Users Bulk Operations can be performed by:

1) Users can be selected by checking the check-boxes

2) Select the operation to perform from the operations drop down and selecting “Execute” Button

The operations that can be performed are:

- Cancel user account
- change or set user data limit
- change user category
- change user expiration date
- send email
- send password reset email
- send welcome email

Admin can view and perform actions for Disabled User, Pending Approval Users, Admin Users by going to the respective tab.
ADD OR EDIT SINGLE REMOTEXS USER

The fields which are required for Adding a remotexs user is:

- **Display name**: Display name of the user
- **Email**: The users Email address
- **Password**: The password to set for the user
- **Status**: This is set as “Active” by default. Set to “blocked” if the user has to be blocked at time of creation
- **User Expiration**: optionally a user account expiry date can be set

*List continues on the next page...*
- About: About the user
- User Profile Image: A image for the users profile can be uploaded here
- First Name: First name of the user
- Last Name: Last name of the user
- User Categories: Category to which user belongs to.

Optional:

Gender – User gender can be added to the User Profile information

Daily Data Limit (in MB): Daily data download limit can be set for user
**RemoteXs Mail Logs**

By clicking the “Mail Logs” tab in the user admin module, you can view all emails which have been sent to your users (welcome emails, password reset email, web form submission and all other emails). You can view the sent email details by clicking the subject shown.

<table>
<thead>
<tr>
<th>Date sent</th>
<th>Mail key</th>
<th>To address</th>
<th>From address</th>
<th>Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thursday, March 17, 2016 - 2:31am</td>
<td>webform_submission</td>
<td><a href="mailto:m1@example.com">m1@example.com</a></td>
<td>“M1’s Customer” <a href="mailto:m1@example.com">m1@example.com</a></td>
<td>Form submission from: Suggestion for purchase</td>
</tr>
<tr>
<td>Thursday, March 17, 2016 - 2:31am</td>
<td>webform_submission</td>
<td><a href="mailto:m2@example.com">m2@example.com</a></td>
<td>“M2’s Customer” <a href="mailto:m2@example.com">m2@example.com</a></td>
<td>Thank you for your suggestions for purchase</td>
</tr>
<tr>
<td>Thursday, March 3, 2016 - 2:56am</td>
<td>webform_submission</td>
<td><a href="mailto:m3@example.com">m3@example.com</a></td>
<td>“M3’s Customer” <a href="mailto:m3@example.com">m3@example.com</a></td>
<td>Form submission from: Ask us</td>
</tr>
</tbody>
</table>
**Usage Reports**

To access Usage Reports, you can click on the “Usage Reports” link on the dashboard.
**SUPPORT CONTACT DETAILS:**

Support Email Id: [support@eclateng.com](mailto:support@eclateng.com)

Support Phone No.: +91-79-40057878

Contact Person: Mr. Umesh Nagori, Mr. Vineet Deshpande, Mr. Madhukar Pai