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LINQ™ Administration Guide for Direct Customers

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Table of Contents

| | | |
|-----|--|---|
| 1 | Welcome | 1 |
| 2 | Organisation Settings..... | 2 |
| 3 | User Management | 3 |
| 3.1 | Adding New Users | 3 |
| 3.2 | Bulk User Import | 4 |
| 3.3 | Editing User Details..... | 5 |
| 3.4 | Deleting Users..... | 6 |
| 4 | Feature Options | 7 |
| 4.1 | Blocking Guest Users..... | 7 |
| 4.2 | Blocking the sending of sketches to external organisations | 7 |
| 4.3 | Enable Viewer Mode | 7 |

1 Welcome

Welcome to the Administration Guide for LINQ Direct Customers.

If your organisation is a LINQ Consulting Partner, please refer to the Administration Guide for Consultant Partners.

This guide will provide you, the Administrator for your LINQ account, the ability to ensure that you can successfully manage LINQ for your business needs.

Most administrative functions are accessed from the Cog in the top right-hand corner of the menu bar:

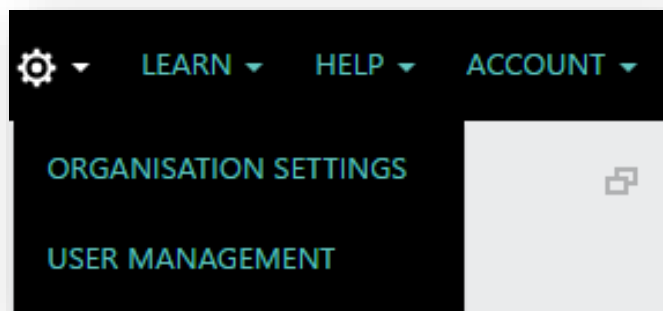


Figure 1 - The Administration Screens are accessed from the Cog

This will access the Administration screens. Note that if you cannot see the Cog, this means that you only have a User or Guest account; only LINQ Administrators can see the Cog.

2 Organisation Settings

This screen will have partially been populated for you when your LINQ account was created:

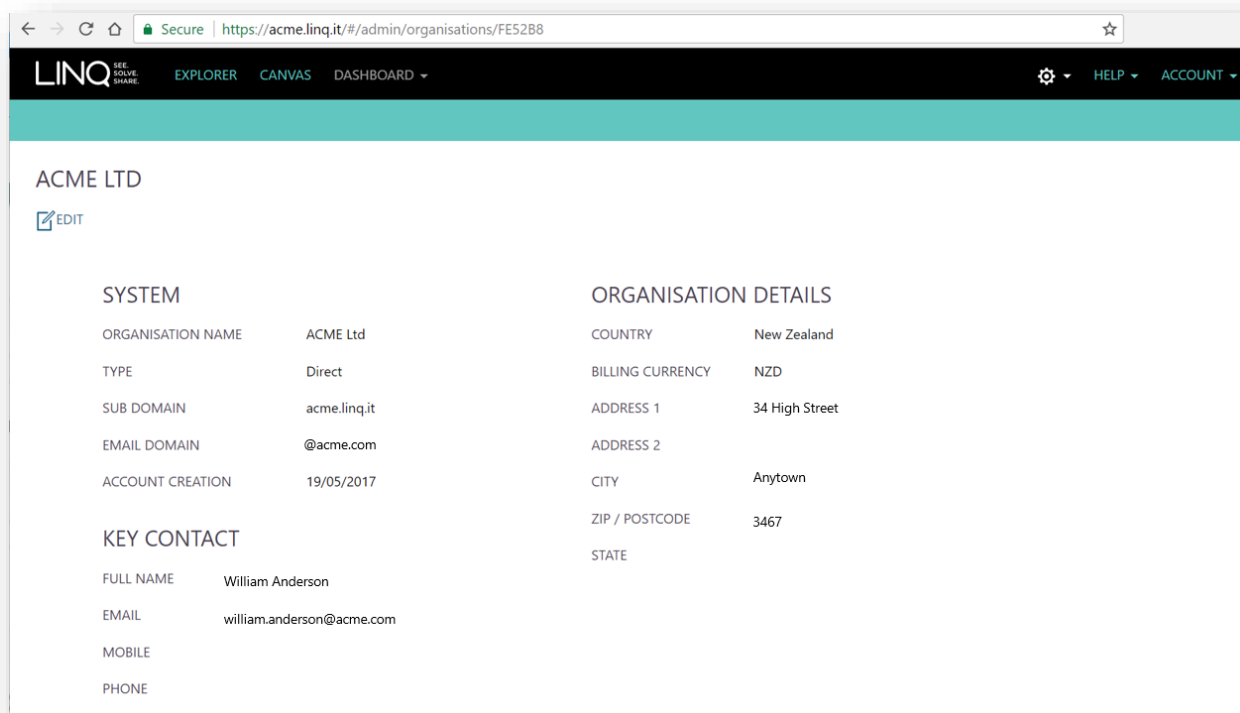


Figure 2 - Your pre-populated Organisation screen with the option to Edit your details

You can choose to edit details as necessary.

System fields which may not be edited include:

- Type of Account – this will be set to Direct
- Subdomain – this will be the URL used to access your account
- Country – this is your billing country and is set by your payment method
- Billing Currency – this is set by your organisation's country of origin

You should complete all other details, especially the Key Contact information.

Company Name may be edited. This will not affect the Subdomain which may not be changed.

The email domain may be edited. It will automatically update the email address of all users that matched the old email domain. Users will be notified of the change via an email to their updated email address. Users will be required to log in with their updated email address from that point onwards:

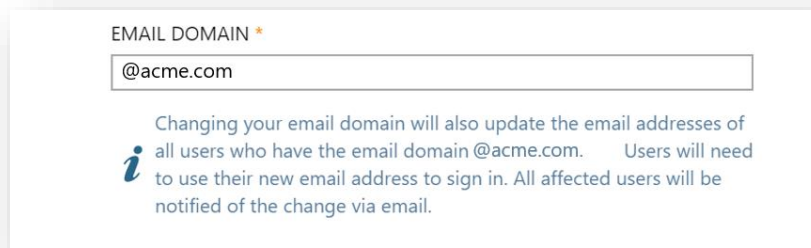


Figure 3 - Editing your email domain in the Organisation Settings screen

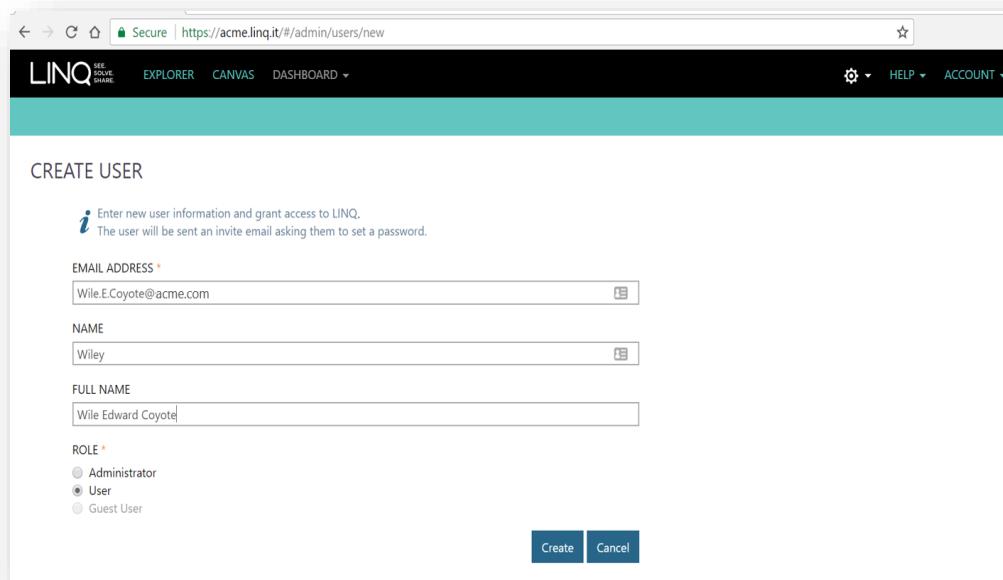
3 User Management

The User Management screen is where you create new user accounts and set the level of access those users have. You can also delete users from this screen.

3.1 Adding New Users

From the user management screen, you can create a user with the CREATE USER button. When you create a user you will need the following information to create an account:

- Email Address
- Name; Preferred Name
- Full Name
- Role



4 - the Create User screen

Figure

Access to LINQ is determined from the user's email address. Users whose email address belongs to the organisation's registered email domain may be added as one of the following:

- Administrator – full control of all aspects of LINQ as described in this guide
- User – a user with no administrative access

A user whose email address does not belong to the organisation's registered email domain (for example, a contractor) may be invited into the account as a Guest User. Guest Users can access the same LINQ capabilities as a regular User.

In Figure 5 below, a user external to Acme.com has been created, who can only be assigned a Guest role:

CREATE USER

i Enter new user information and grant access to LINQ.
The user will be sent an invite email asking them to set a password.

EMAIL ADDRESS *
Road.runner@meepmeep.com

NAME
Road

FULL NAME
Roadway Runner

ROLE *
 Administrator
 User
 Guest User

Create Cancel

Figure 5 – Road Runner added as a Guest user

Note that an organisation can request to block the creation of Guest Users. If LINQ prevents you from adding a Guest User, please ask the primary LINQ Admin if a block is in place. Alternatively, submit a support ticket and we will confirm your status.

3.2 Bulk User Import

Many users can be added at once using the 'Import Users' tool.

IMPORT USERS

STEP 1 - GENERATE
Use the CSV template below. 'Email' is a required column.
DOWNLOAD TEMPLATE

STEP 2 - IMPORT

Drag and drop a CSV file here
OR CHOOSE A FILE

Create Cancel

Figure 6 - Bulk User Import screen

This requires a correctly formatted CSV file to be imported. The template can be downloaded using the 'DOWNLOAD TEMPLATE' link. The required structure is:

| Email (required) | Name | Full Name |
|-----------------------|-------|--------------|
| Bob.jones@acme.com | Bob | Robert Jones |
| Sarah.walker@acme.com | Sarah | Sarah Walker |
| John.smith@acme.com | John | John Smith |

Once the necessary information has been added, the CSV file may be uploaded by dragging and dropping or choosing the file. The added users can now be reviewed with an opportunity to identify and fix errors. Note that the role cannot be changed from 'User' to 'Admin' at this point; this must be done as an individual edit later. If an external e-mail is used, the role is 'Guest' and this cannot be changed.

The screenshot shows the 'IMPORT USERS' interface with four steps: GENERATE, IMPORT, PREVIEW, and CREATE. In the PREVIEW step, a table displays user data from a CSV file. One row is marked as an error due to an invalid email address.

| EMAIL * | NAME | FULL NAME | ROLE | |
|-----------------------|-------|--------------|------|-----------------------|
| bob.jones@acme.com | Bob | Robert Jones | USER | |
| sarah.walker@acme... | Sarah | Sarah Walker | USER | |
| john.smith@acme.co... | John | John Smith | USER | |
| not an e-mail | Bad | Bad User | USER | Invalid email address |

Figure 7 - Reviewing a Bulk Import

Note that adding users may incur additional monthly subscription charges depending on your pricing agreement with LINQ Ltd. Please ensure that you understand the pricing implication before importing bulk users.

3.3 Editing User Details

You can edit user details using the Edit tool against each user record, or view the user details by clicking on the user's Full Name.

It is important to note that there are limitations regarding the editing of e-mail addresses. An e-mail address can only be edited within the domain. An Admin or User cannot change to an outside e-mail address; a Guest User cannot change to an inside e-mail address.

If an Admin or User is leaving the organisation to become a consultant (for example), the recommended process is:

1. Invite the soon-to-be consultant as a Guest user (using the Create New User process above)
2. Transfer sketches from the Admin/User account to the Guest account
3. Delete the Admin / User account

Note that there must be at least one Admin account. It isn't possible to change the status of the 'last' Admin, nor is it possible to delete the last Admin.

3.4 Deleting Users

You may delete a user from the USERS screen; please note that doing so will delete all unshared sketches owned by the user. You should ensure that any important content has been shared with at least one other user before deleting if this is of concern, as shared sketches will be reassigned to the LINQ Administrator when the user is deleted.

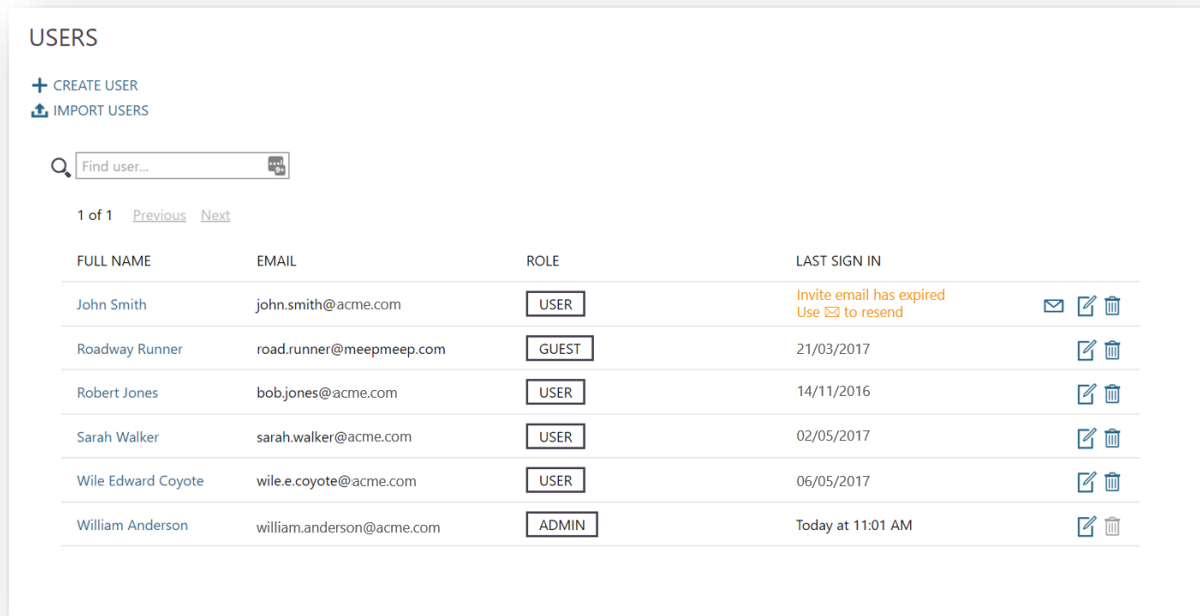


Figure 8 - the User screen from which you add and delete users

4 Feature Options

At LINQ Ltd, we can control other aspects of your LINQ experience based on your specific organisation needs. Your Administrator cannot access these options; a request needs to be submitted as a Support Ticket to change these settings.

4.1 Blocking Guest Users

An organisation can request LINQ Ltd to block the creation of Guest Users. This is one way of ensuring that LINQ sketches are secured from external access. However, note that with this block in place, it would require that consultants working in the organisation have organisational e-mails to access LINQ.

This action only blocks the creation of new Guest Users. If blocking is initiated as LINQ is being introduced, there will be no Guest Users. If the block is introduced later, any existing Guest users would continue to be able to access LINQ. If the organisation wishes to remove existing Guest user access, these users will need to be deleted manually using the process outlined above.

4.2 Blocking the sending of sketches to external organisations

An organisation can request that LINQ prevent sketches from being copied to LINQ Users in external organisations. This is the second way of ensuring that sketches are only accessible by employees with LINQ access.

This action only blocks the sending of copies in the future; it does not retrieve previously sent sketches.

Please also note that any LINQ content that has been incorporated in PowerPoint, Word or Excel can be shared like any other document; this feature does not affect document-based sharing

4.3 Enable Viewer Mode

As the LINQ Platform evolves, we will be introducing entirely new ways of sharing LINQ Insights. The first stage of that is the ability to publish LINQ content into a simple Viewer application. This is a capability that will evolve quickly and will allow the sharing of LINQ Insights into a simple, interactive presentation that can be used by Decision Makers.

Viewer packs are available at additional cost. Please contact LINQ Ltd if you are interested in enabling the Viewer Mode.