



# **NetDania**

## **Administration Web Console User's Manual**

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## 1. Introduction

This document specifies the functionality of the Administration Web Interface which is a web tool aimed for managing “NetStation Corporate” platform users.

“**NetStation Corporate**” is a multi-asset research and analyses platform for Windows and Mac. Considering their rights within the platform, there are two types of NetStation users:

- ❖ NetStation User - has access to his own NetStation account only.
- ❖ NetStation SuperUser - has access to his own NetStation account but, at the same time, can manage, through Alert Central, alerts (see/move/add/remove) for all users within his company. In addition, the SuperUser can configure the workspace to be displayed as default for all users.

Based on their admin rights we have identified two categories of Admin users who will have access to the “**Administration Web Interface**”:

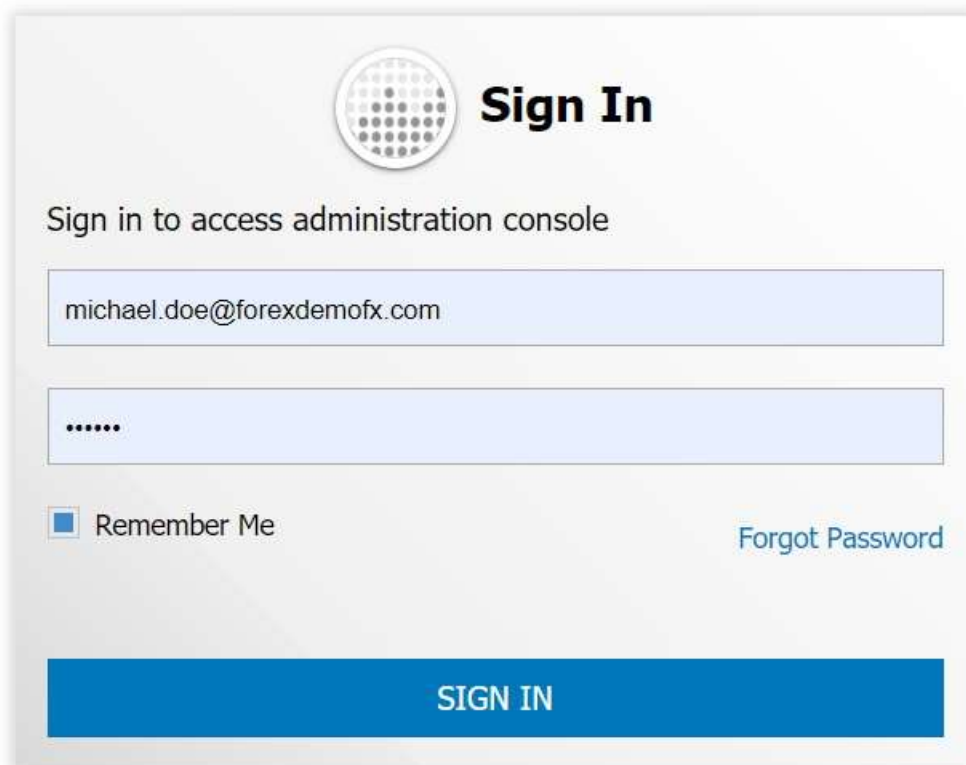
- ❖ Corporate Admin(s) - allowed to add/modify/delete/reinstate NetStation Users and SuperUsers accounts;
- ❖ SuperAdmin(s) - allowed to administrate Corporate Admin accounts and also to add/modify/delete/reinstate NetStation Users and SuperUsers

**NOTE:** All screenshots are created with demo data for explanation purpose only and therefore some of the screenshots may not match your specific data content.

## 2. Login to AdminWebConsole

For accessing the AdminWebConsole you should sign-in with the credentials provided by NetDania for this tool. These credentials could be remembered if the checkbox “Remember me” is checked!

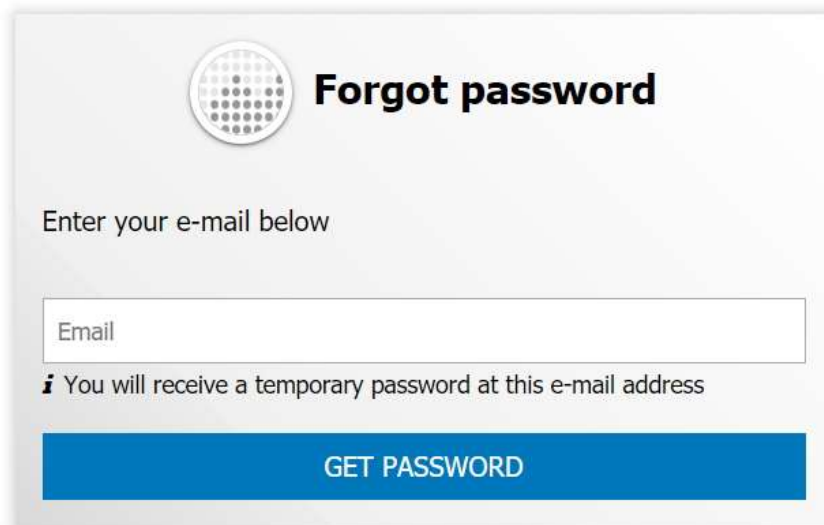
### 2.1 Sign In



The image shows a 'Sign In' form for the AdminWebConsole. At the top, there is a circular logo with a grid pattern and the text 'Sign In'. Below the logo, the text 'Sign in to access administration console' is displayed. The form contains two input fields: the first is for the email address, containing 'michael.doe@forexdemofx.com', and the second is for the password, represented by six dots. Below the password field, there is a checkbox labeled 'Remember Me' which is checked, and a link labeled 'Forgot Password'. At the bottom of the form is a large blue button with the text 'SIGN IN' in white capital letters.

Please note that “Remember Me” functionality will not be available in case the browser cache will be deleted. If you don’t remember the password, click on the “Forgot Password” option from the “Sign-in” form.

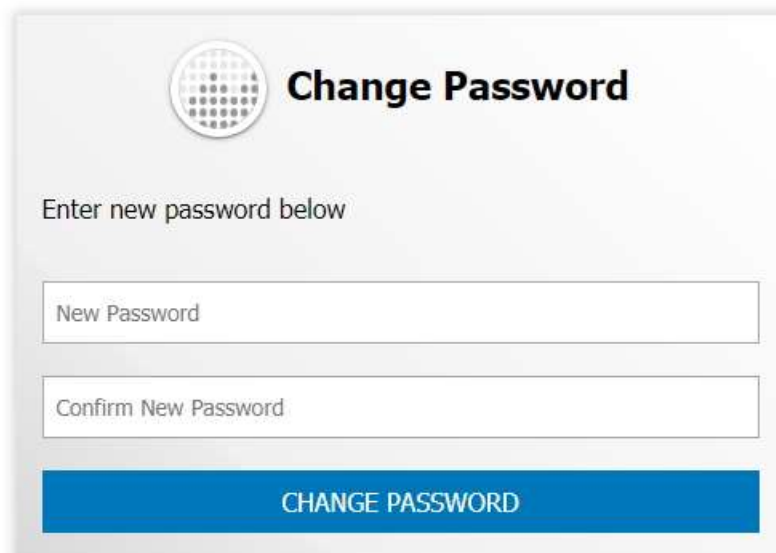
## 2.2 Forgot password



The image shows a 'Forgot password' form. At the top left is a circular logo with a grid of dots. To its right is the title 'Forgot password' in bold. Below the title is the instruction 'Enter your e-mail below'. There is a single text input field with the placeholder text 'Email'. Below the input field is an information icon (a lowercase 'i' in a square) followed by the text 'You will receive a temporary password at this e-mail address'. At the bottom of the form is a blue button with the text 'GET PASSWORD' in white capital letters.

In the “Forgot password” page, you should specify the email address where to receive a temporary password. Once pressed “Get Password” button an email with a temporary password will be sent at the email you’ve just entered.

At the first login with the temporary password received by email you will have to change and then confirm a new password.



The image shows a 'Change Password' form. At the top left is a circular logo with a grid of dots. To its right is the title 'Change Password' in bold. Below the title is the instruction 'Enter new password below'. There are two text input fields: the first one has the placeholder text 'New Password' and the second one has the placeholder text 'Confirm New Password'. At the bottom of the form is a blue button with the text 'CHANGE PASSWORD' in white capital letters.

## 3. AdminWebConsole Admins

### 3.1 Corporate Admin

Each company' account has to be created by NetDania. If existing, all current NetStation users have been assigned respectively to each company.

**Corporate Admins** can add / modify / remove / reinstate **NetStation** Users and **NetStation** SuperUsers. They will see these types of NetStation users within the console.

netdania michael.doe@forexdemofx.com Sign out

Company Ltd.

View users Add user

Users filter

User  Search

Show Active Users

Users 5

#	First Name	Last Name	Email	Country	SuperUser*	Registration Date
<a href="#">Edit</a> 1	Billy	Doe	billy.doe@forexdemofx.com	DENMARK	False	2020-05-06 03:30:07
<a href="#">Edit</a> 2	Bob	Doe	bob.doe@forexdemofx.com	UNITED KINGDOM	False	2020-05-06 03:48:56
<a href="#">Edit</a> 3	Brian	Doe	brian.doe@forexdemofx.com	FRANCE	True	2020-05-06 05:00:13
<a href="#">Edit</a> 4	George	Doe	george123@forexdemofx.com	UNITED KINGDOM	False	2020-05-11 06:18:31
<a href="#">Edit</a> 5	Jane	Doe	jane123@forexdemofx.com	UNITED KINGDOM	False	2020-05-11 06:18:29

\* Super user can setup NetStation default workspace and manage all user alerts.

Export columns

First Name  Last Name  Email  Country  SuperUser

Registration Date

Export

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(AdminWebConsole for Corporate Admin - Default page - View users)

### 3.1.1 View NetStation Users

AdminWebConsole default page is **View Users** and it's split in 3 sections:

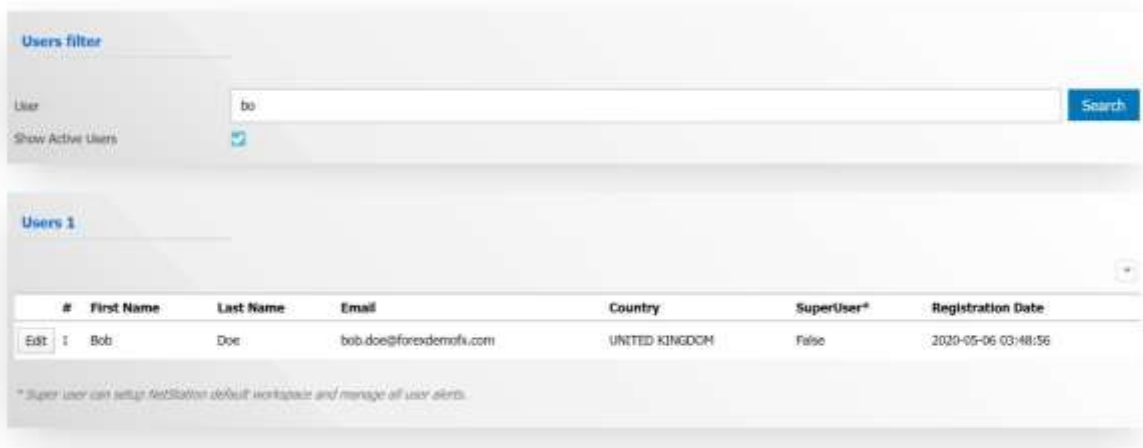
1. **Users filter** – Users can be filtered based on various criteria: **User** name, **User** email, current state **Active/All (Active&Inactive)**;
2. **Users** – Display **users registered under your company** considering the criteria applied at 1;
3. **Export columns** – Once the filter applied and the table of users built, from this section you will have the possibility to export the result as CSV file (CSV format is known by MS Word, Libre/Open Office, etc) with the desire columns. By default, all options “First Name, Last Name etc” are checked.

#### 3.1.1.1 Users filter

Users can be filtered based on a keyword (searching for First Name, Last Name or Email) or by their state.

The list of users will only refresh after pressing the Search button. In case the text field value is empty when doing so all the users will be displayed.

**Show Active Users** checkbox will show only active users when checked or users from “all time” if unchecked.



(Filtering example of **User** contains “bo”)

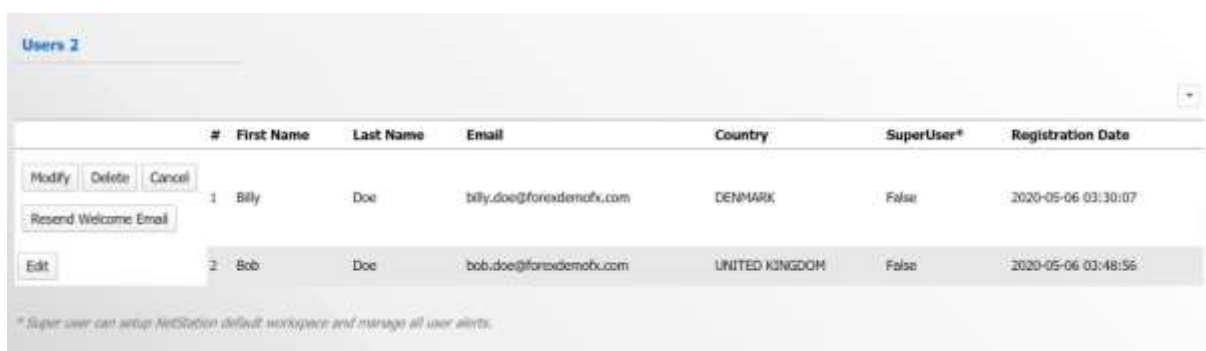
#### 3.1.1.2 Users

This panel displays registered users from your company (filtered or not). Columns displayed are the same with export columns: *First Name, Last Name, Email, Country, SuperUser\*, Registration Date*.

*\* SuperUser can setup NetStation default workspace and manage all user alerts.*

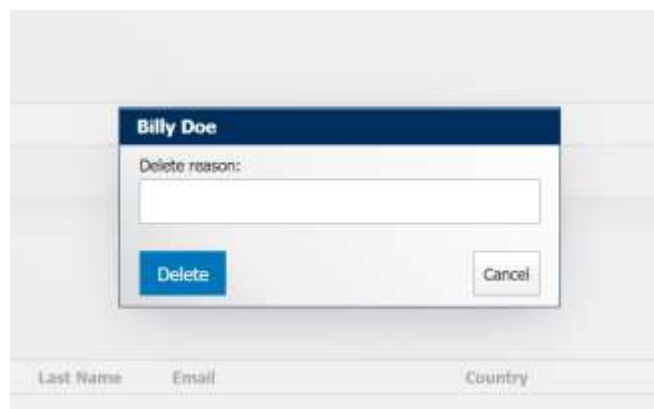
*\* Users Grid is responsive. On mobile devices you should swipe left/right to see all columns. Also, you can use column toggle (if is available) to show/hide columns.*

Each user row has the Edit button displayed on the first column which when selected gives the option to **Modify, Delete, Resend Welcome Email** to the user or **Cancel** the Edit action. In case All users are displayed - **“Show Active Users”** option is unchecked- for the deleted accounts will be available the reinstate option.



(Expanded Options box after pressing the **Edit** Button)

- **Modify** will redirect to Edit User details - First & Last Name, Country, Password or if is SuperUser or not;
- **Delete** will ask you to confirm deleting the user and also specify a mandatory delete reason;



- **Cancel** will refresh the page and close the Edit options for the user;
- **Resend Welcome Email** will resend the welcome email containing the user credentials and the link to NetStation Corporate. A new password for the user is required when

doing so. The **Welcome Email** will be also sent to you as a proof it has been sent from our system.

**Billy Doe**

A new password is required when resending welcome email.  
Enter the new password below:

**Resend Welcome Email** Cancel

Last Name    Email    Country

### Show/Hide columns

Users grid columns can be hidden or displayed by clicking on the top/right arrow. This would especially useful in case the console is accessed from mobile devices. Columns visibility options will be saved so if you refresh the page or return to “View Users” page, you’ll see the same columns order/visibility.

#	First Name	Last Name	Email	SuperUser*	Registration Date
<input type="button" value="Edit"/> 1	Bob	Doe	bob.doe@forexdemofx.com	False	2020-05-06 03:48:56

- Email
- Country
- SuperUser\*
- Registration Date

\* Super user can setup NetStation default workspace and manage all user alerts.

*(Country columns is hidden. Check Country column from Options list for be displayed again)*

### Sorting users

Users can be sorted (ascending/descending) by clicking on the header of the table columns. Sorting can be done for a single column at once and it is available for each and every column. Selected column will be colored in blue and an arrow will be displayed corresponding to the sorting type (ascending/descending).

#	First Name	Last Name	Email	Country	SuperUser*	Registration Date
<input type="button" value="Edit"/> 1	Brian	Doe	brian.doe@forexdemofx.com	FRANCE	True	2020-05-06 05:00:13
<input type="button" value="Edit"/> 2	Bob	Doe	bob.doe@forexdemofx.com	UNITED KINGDOM	False	2020-05-06 03:48:56
<input type="button" value="Edit"/> 3	Billy	Doe	billy.doe@forexdemofx.com	DENMARK	False	2020-05-06 03:30:07

\* Super user can setup NetStation default workspace and manage all user alerts.

*(Users will be sorted by First Name descending)*

## Pagination

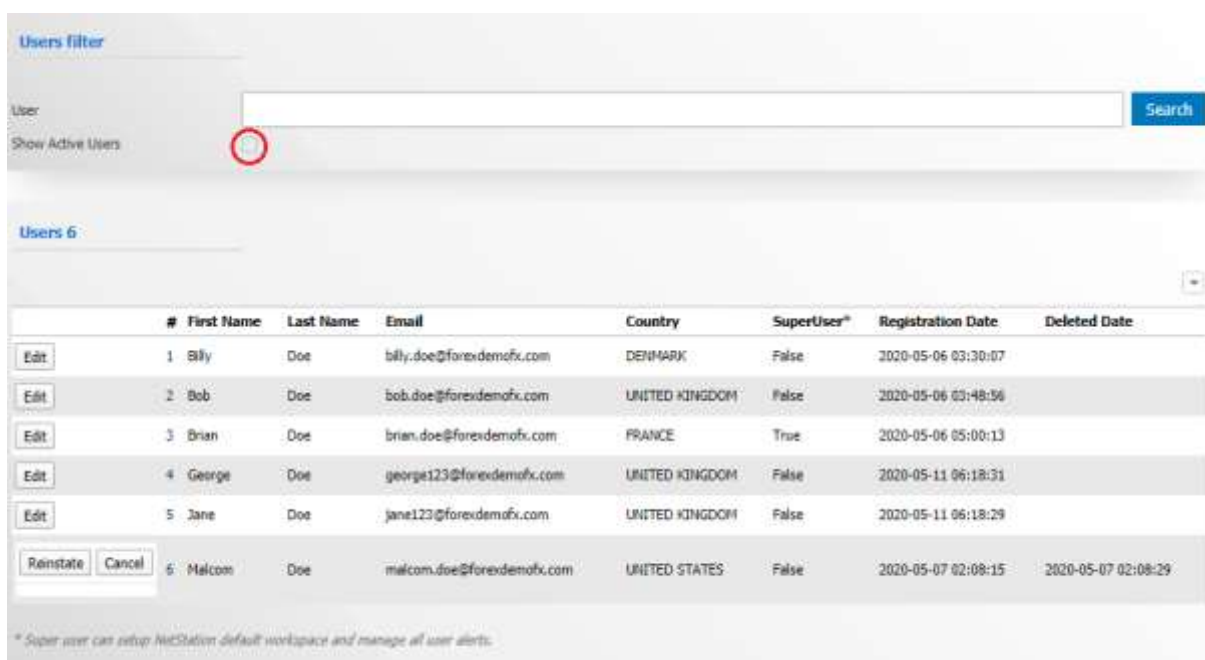
If your company has more than 20 users then users' grid will be displayed with pagination. If you have more than 60 users then it recommended to find a user by searching or/and using sorting columns.



(Pagination for a Company with more than 200 users)

### 3.1.1.3 Inactive/Deleted Users

If "Show Active Users" checkbox is unchecked then the users' grid will be updated and it will show a list of users "all time" of your company (active and deleted). In this case, for those deleted, a new column will be displayed with the "Deleted Date".



Users filter

User  Search

Show Active Users

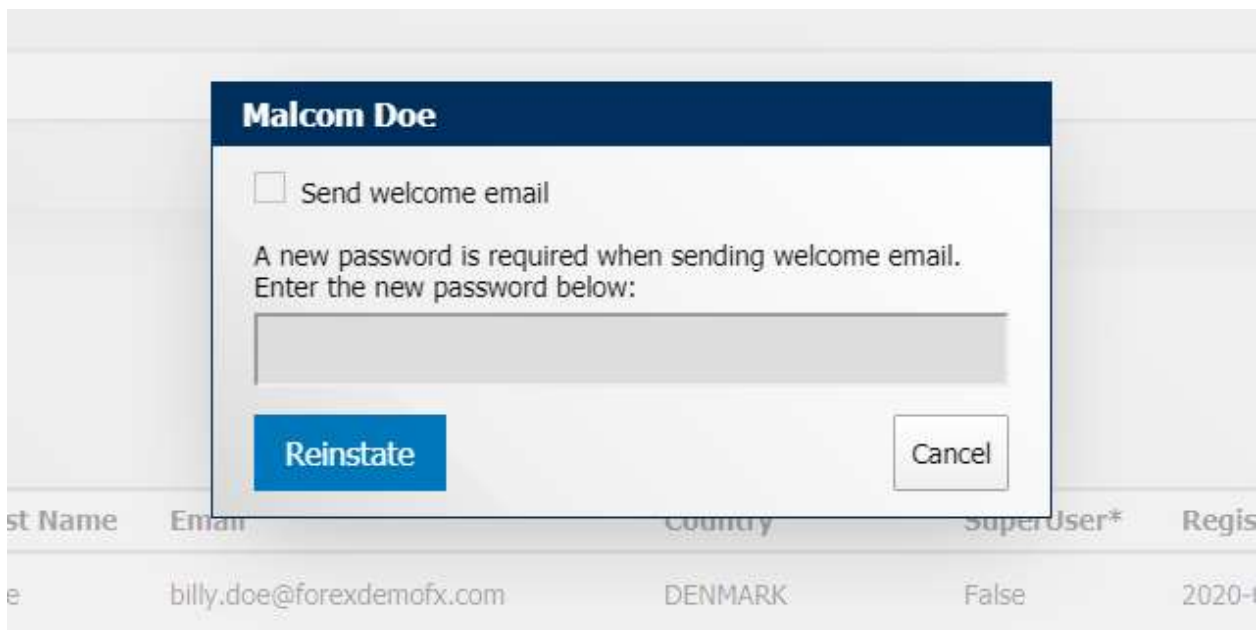
Users 6

	#	First Name	Last Name	Email	Country	SuperUser*	Registration Date	Deleted Date
Edit	1	Billy	Doe	billy.doe@forexdemo.fx.com	DENMARK	False	2020-05-06 03:30:07	
Edit	2	Bob	Doe	bob.doe@forexdemo.fx.com	UNITED KINGDOM	False	2020-05-06 03:48:56	
Edit	3	Brian	Doe	brian.doe@forexdemo.fx.com	FRANCE	True	2020-05-06 05:00:13	
Edit	4	George	Doe	george123@forexdemo.fx.com	UNITED KINGDOM	False	2020-05-11 06:18:31	
Edit	5	Jane	Doe	jane123@forexdemo.fx.com	UNITED KINGDOM	False	2020-05-11 06:18:29	
Reinstate Cancel	6	Malcom	Doe	malcom.doe@forexdemo.fx.com	UNITED STATES	False	2020-05-07 02:08:15	2020-05-07 02:08:29

\* Super user can setup NetStation default workspace and manage all user alerts.

(Display all users – active or inactive/deleted)

## Reinstate Button



Deleted users could be reactivated using the **Reinstate** option. This function is applicable for a single user at once. When selecting the "Reinstate" button a new password is required for that specific user. The welcome email can also be (re)sent to the user by checking the "Send welcome email checkbox". Selecting the Cancel button will revert to the previous screen without performing any actions.

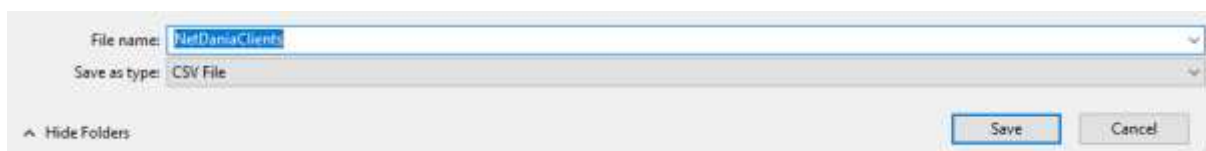
### 3.1.1.4 Export columns

Columns for export are: *First Name, Last Name, Email, Country, SuperUser\*, Registration Date*. If the company has multiple user types then also the *User Type* column will be displayed/available for export. A *User Type* refers to different settings/package for some *Users* (e.g. Professional News, Additional data, etc.)

If the option **Show Active Users** is unchecked then the *Deleted Date* column will also be available as deleted users will be included in the list.

The desired columns (checked) can be exported. By default, all columns are checked.

After pressing the **Export** button you'll see a "Save As" Dialog box. The export will be finished and saved on disk as CSV file only after you will press the Save button.



(By default, file name is **NetDaniaClients.CSV**)

If the browser option to ask where to save each file before downloading is deactivated then the file will automatically be saved to the predefined downloads location.

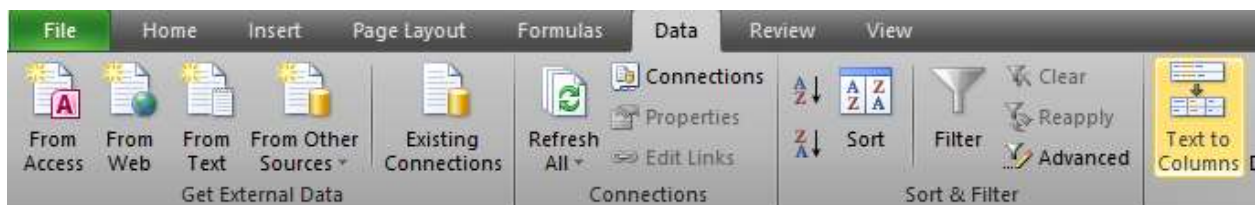
Sample columns selection as below:

will produce a CSV file like the following one:

	A	B	C	D	E	F	G	H	I
1	First Name;Last Name;E-mail;Country;SuperUser;Registration Date;								
2	Billy;Doe;billy.doe@forexdemofx.com;DENMARK;False;2020-05-06 03:30:07;								
3	Bob;Doe;bob.doe@forexdemofx.com;UNITED KINGDOM;False;2020-05-06 03:48:56;								
4	Brian;Doe;brian.doe@forexdemofx.com;FRANCE;True;2020-05-06 05:00:13;								
5	George;Doe;george123@forexdemofx.com;UNITED KINGDOM;False;2020-05-11 06:18:31;								
6	Jane;Doe;jane123@forexdemofx.com;UNITED KINGDOM;False;2020-05-11 06:18:29;								

Within Microsoft Excel the values can be separated to columns by following the steps below:

1. Select Data -> Text to Columns



2. Within the wizard select Delimited and click Next.

3. Select Semicolon and click Finish.

Convert Text to Columns Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

Tab

Semicolon

Comma

Space

Other:

Treat consecutive delimiters as one

Text qualifier: "

Data preview

First Name	Last Name	E-mail	Country	SuperUser
Billy	Doe	billy.doe@forexdemofx.com	DENMARK	FALSE
Bob	Doe	bob.doe@forexdemofx.com	UNITED KINGDOM	FALSE
Brian	Doe	brian.doe@forexdemofx.com	FRANCE	TRUE
George	Doe	george123@forexdemofx.com	UNITED KINGDOM	FALSE

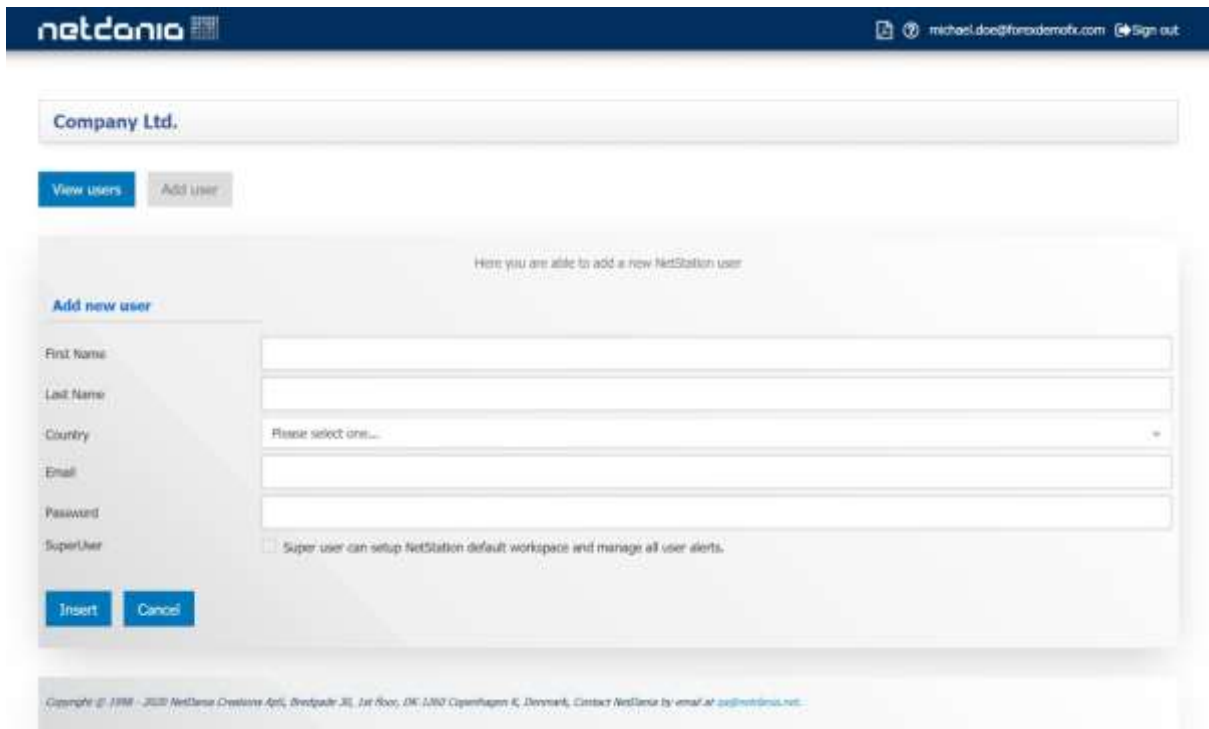
Buttons: Cancel, < Back, Next >, Finish

After performing the steps above the document should look like this:

	A	B	C	D	E	F
1	First Name	Last Name	E-mail	Country	SuperUser	Registration Date
2	Billy	Doe	billy.doe@forexdemofx.com	DENMARK	FALSE	5/6/2020 3:30
3	Bob	Doe	bob.doe@forexdemofx.com	UNITED KINGDOM	FALSE	5/6/2020 3:48
4	Brian	Doe	brian.doe@forexdemofx.com	FRANCE	TRUE	5/6/2020 5:00
5	George	Doe	george123@forexdemofx.com	UNITED KINGDOM	FALSE	5/11/2020 6:18
6	Jane	Doe	jane123@forexdemofx.com	UNITED KINGDOM	FALSE	5/11/2020 6:18

### 3.1.2 Add NetStation user

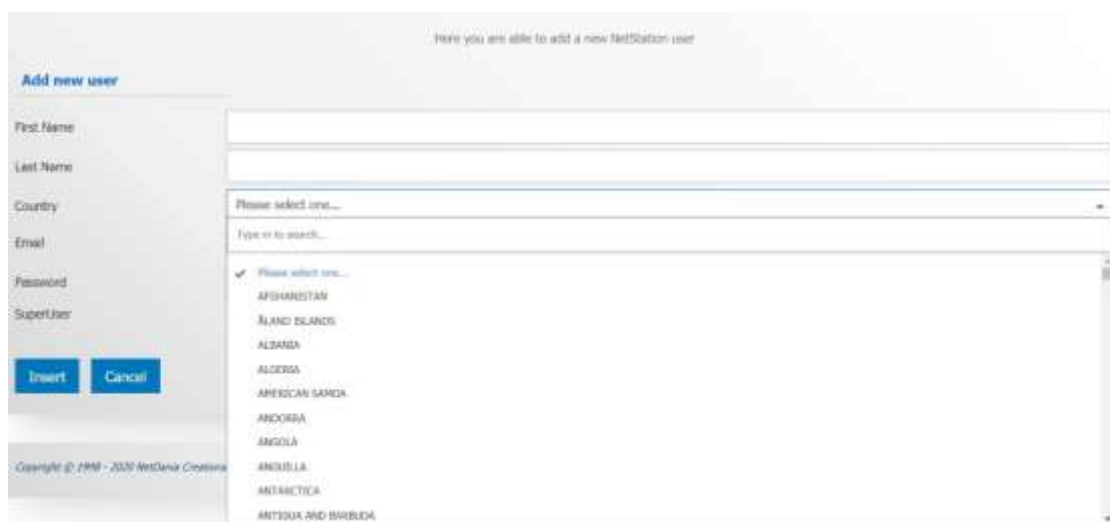
The Add user form includes all the fields available also within the Edit user form. All the fields are mandatory.



(Add new user form)

If you want to add a user that can configure **NetStation** the default workspace for all users and who can manage alerts (see/move/add/remove) set by all his colleagues then you should check option **“Super user can setup NetStation default workspace and manage all user alerts”**.

For the Country section a drop-down menu containing the countries that can be selected is available.



(Country drop-down options)

In case one or more of the fields are missing they will be marked with red, as “Required”:

The screenshot shows the NetDania web console interface. At the top, the NetDania logo is on the left, and the user's name 'michael.doe@forademo.com' and a 'Sign out' link are on the right. Below the header, a search bar contains 'Company Ltd.'. Two buttons, 'View users' and 'Add user', are visible. The 'Add user' button is active, leading to a form titled 'Add new user'. The form contains the following fields: 'First Name', 'Last Name', 'Country' (a dropdown menu), 'Email', 'Password', and 'SuperUser' (a checkbox). Each of the first five fields has a red asterisk and the word 'Required' next to it. The 'SuperUser' checkbox is unchecked, and its label includes a tooltip: 'Super user can setup NetStation default workspace and manage all user alerts.' At the bottom of the form are 'Insert' and 'Cancel' buttons.

(Form submitting with no data filled in)

After successfully adding the user, the following message will appear:

“User registered successfully! A confirmation email has been sent to the new user email address. You will receive a copy of this email also.”

You can add a new user from same page using the Add user form or just go to “View users” list.

### 3.2 Super Admin

Your company has been inserted by NetDania and all company NetStation users have been assigned.

**Super Admin** is allowed to add **Corporate Admins** and also to add / modify / delete / reinstate NetStation Users and NetStation SuperUsers.

Company Ltd.

View users

Add user

Manage Corporate Admins

Users filter

User

Search

Show Active Users

Users 5

#	First Name	Last Name	Email	Country	SuperUser*	Registration Date
<a href="#">Edit</a> 1	Billy	Doe	billy.doe@forexdemofx.com	DENMARK	False	2020-05-06 03:30:07
<a href="#">Edit</a> 2	Bob	Doe	bob.doe@forexdemofx.com	UNITED KINGDOM	False	2020-05-06 03:48:56
<a href="#">Edit</a> 3	Brian	Doe	brian.doe@forexdemofx.com	FRANCE	True	2020-05-06 05:00:13
<a href="#">Edit</a> 4	George	Doe	george123@forexdemofx.com	UNITED KINGDOM	False	2020-05-11 06:18:31
<a href="#">Edit</a> 5	Jane	Doe	jane123@forexdemofx.com	UNITED KINGDOM	False	2020-05-11 06:18:29

\* Super user can setup NetStation default workspace and manage all user alerts.

Export columns

First Name

Last Name

Email

Country

SuperUser

Registration Date

Export

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(AdminWebConsole for Super Admin - Default page - View users)

### 3.2.1 View NetStation users

This function is similar to the one used by Corporate Admins (same layout/views/texts/options). [See details](#)

### 3.2.2 Add NetStation user

Similar to **Corporate Admin**. [See details](#)

### 3.2.3 Manage Corporate Admins

The screenshot shows the NetDania web console interface. At the top, the NetDania logo is on the left, and the user's name 'John.doe@forexdemo.fi.com' and a 'Sign out' button are on the right. Below the header, there is a search bar containing 'Company Ltd.'. Underneath, there are three buttons: 'View users', 'Add user', and 'Manage Corporate Admins'. A blue button labeled 'Add Corporate Admin' is also visible. The main content area features a table with the following columns: '#', 'First Name', 'Last Name', 'Email', and 'Company Title'. The table contains two rows of data:

#	First Name	Last Name	Email	Company Title
1	Michael	Doe	michael.doe@forexdemo.fi.com	
2	Peter	Doe	peter.doe@forexdemo.fi.com	

Each row has an 'Edit' button in the first column. Below the table, there is a note: '\* Corporate Admin can add/modify/remove/reactivate NetDania users and SuperUsers'. At the bottom, there is a copyright notice: 'Copyright © 1997 - 2019 NetDania Oyj. All rights reserved. Contact NetDania by email at [info@netdania.net](mailto:info@netdania.net)'.

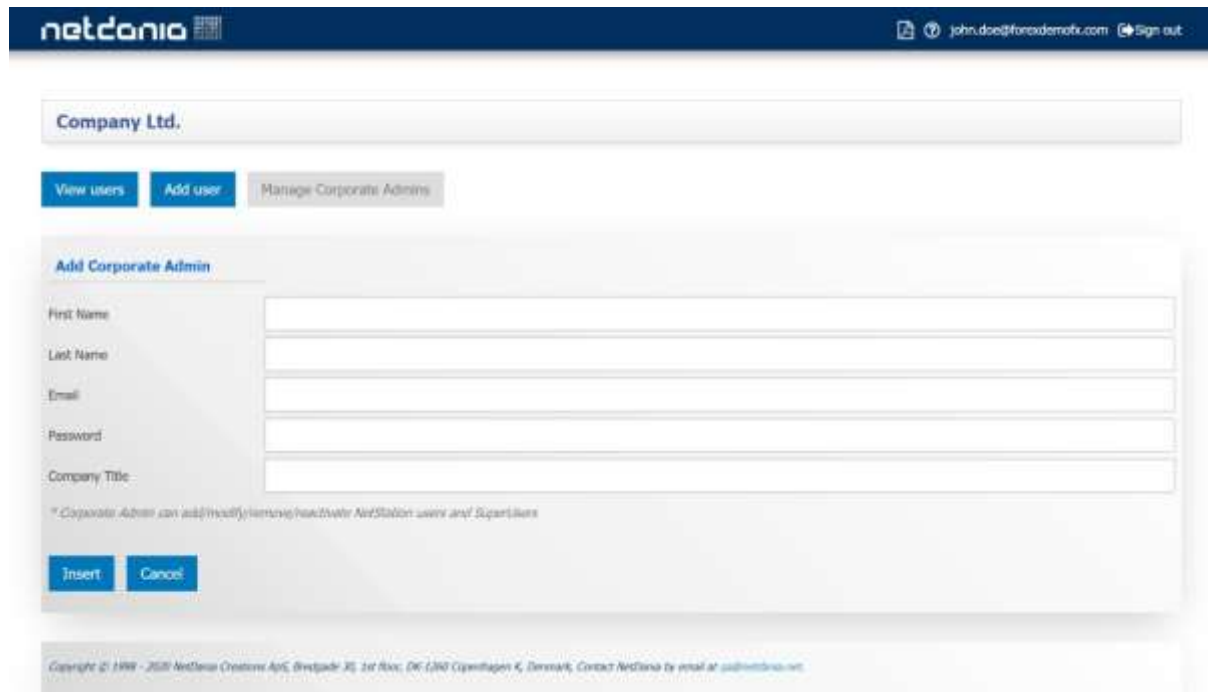
In this section you'll see the person(s) registered as **Corporate Admin(s)**. At any time, you can add a Corporate Admin by pressing the button "Add Corporate Admin".

Similar to "View users" section, you can:

- select the Edit button displayed on the first column which when selected gives the options to Modify/Delete the admin user or Cancel the Edit action;
- sort columns;
- view pagination.

### 3.2.3.1 Add/View Corporate Admin

The Add Corporate Admin form includes all the fields available also within the “Edit user” form.



(Add new Corporate Admin form)

All form fields are compulsory.

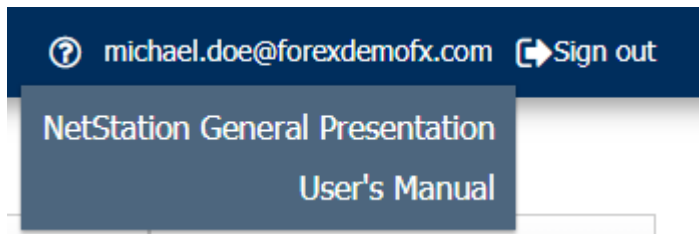


(Form submitting with no data filled in)

After successfully adding the Corporate Admin user, you will be redirected to the Corporate Admin list.

You can add a new Corporate Admin or just go to “View users” list.

## 4. References



At any time, by selecting the links displayed at the top right side of the page you can download the latest versions of our user-guides for:

- [NetStation](#);
- [The AdminWebConsole](#)

## 5. Support

For any questions or suggestions do not hesitate to contact us at the email address [qa@netdania.net](mailto:qa@netdania.net).