

Chainformation Admin User Guide (Clusters)

Last Updated: December 15, 2021

Welcome to the **Chainformation** user guide. In this manual, we will learn how to manage the **Clusters** section on the **Our organization** page.

Chainformation allows you to create business clusters for your organization and add several local units from different geographical and business areas in these clusters. You can add several units operated/owned by the same franchisee/licensee in a cluster. (See Separate Instructions on **Local Units**)

For Central Admins, a cluster is an entity within Chainformation and makes it possible to share information to selected cluster(s). The local manager can effortlessly manage the local staff in all the units associated with their respective clusters. All features in Chainformation can be made available within a cluster e.g Checklists, Tasks, File sharing etc. Furthermore, the local users associated with different roles can share information with their selected colleagues in their respective clusters as well. (See Separate Instructions on **Roles Administration**)

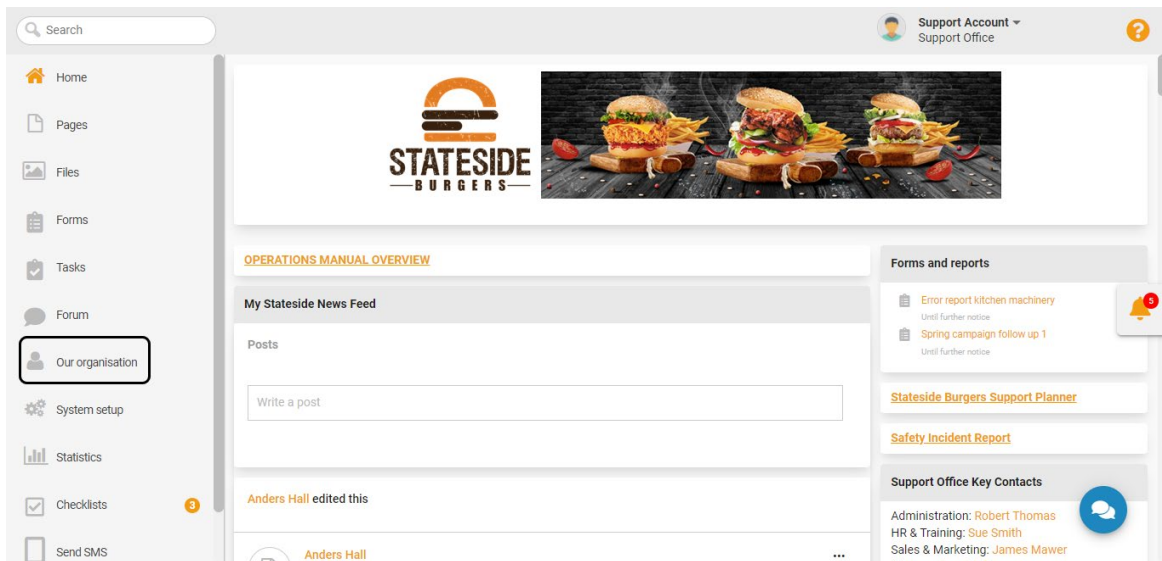
Here is a list of all the features of the **Clusters** module that we will discuss in this manual.

- Create a New Cluster
- View the Existing Clusters in Your Organization
- Review the Details of a Cluster
- Edit a Cluster
- Delete a Cluster

Create a New Cluster

Once you have logged in to the **Chainformation** platform, follow these navigation steps to **create a new cluster**.

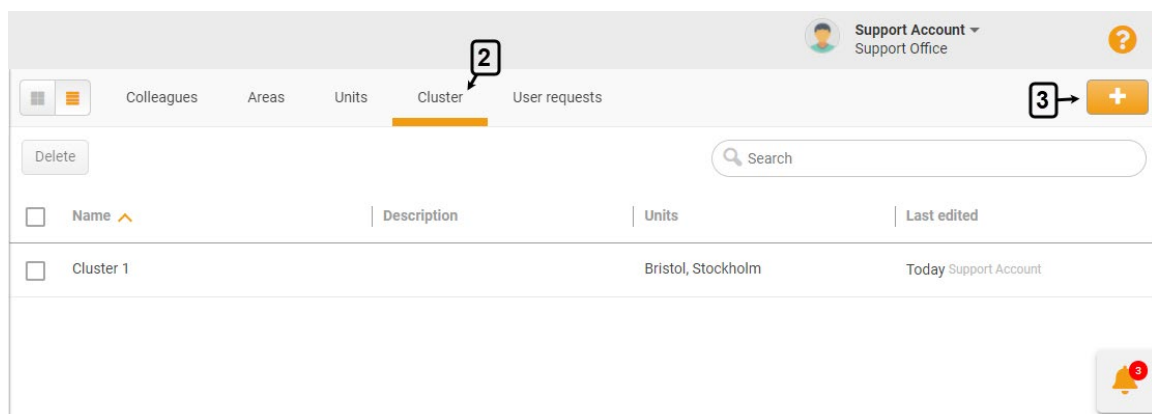
1. Click the **Our organization** button in the left-side menu to open the **Our organization** page.



By default, you will be redirected to the **Colleagues** tab.

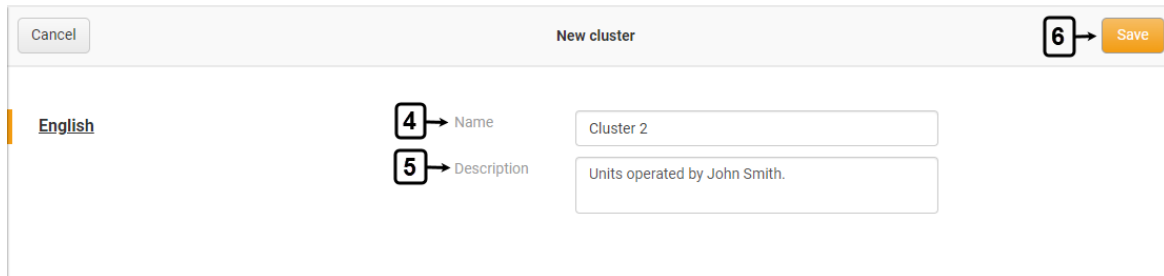
2. Click the **Clusters** button from the header menu of the **Our organization** page to open the **Clusters** tab.

3. Click the (+) icon in the top-right corner of the **Clusters** page to create a new cluster.



This will open the **New cluster** page.

4. On the **New cluster** page, enter the **Name** of the new cluster.
5. Enter a brief **Description** (if applicable) of the new cluster.
6. Once you have entered all the required details of the new cluster, click the **Save** button in the top-right corner of the page to add this cluster to your organization.



Cancel New cluster Save

English

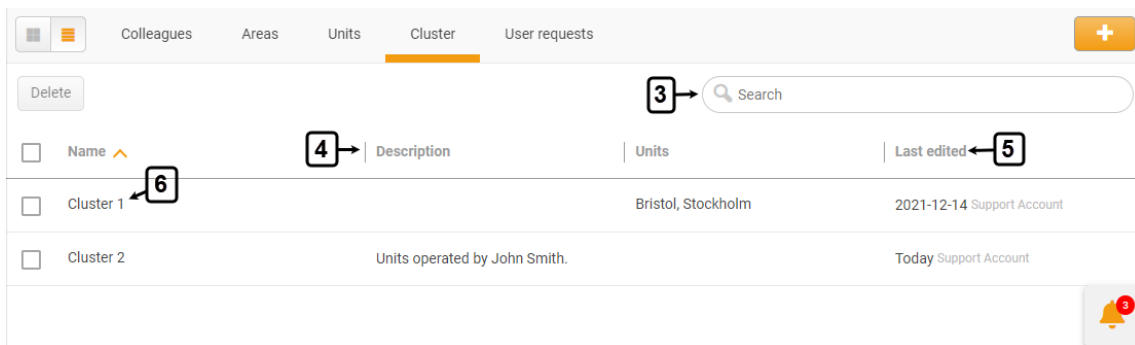
4 → Name Cluster 2





5 → Description Units operated by John Smith.

The new cluster has been added to your organization and you can associate the new or existing local units with it from now on. [See the User Guide for Units](#)

View the Existing Clusters in Your Organization

1. Access the **Clusters** tab on the **Our organization** page by following the navigation steps as demonstrated in the previous section.
2. On the **Clusters** page, you can view all the existing clusters in your organization.
3. You can also use the **Search** field to find a cluster based on any of the available data/information. See the User Guide for Search
4. You can see the description of each cluster and all the units in it on the **Clusters** page.
5. You can also see when and who has last edited a cluster.
6. Click the name of a cluster to view its details.

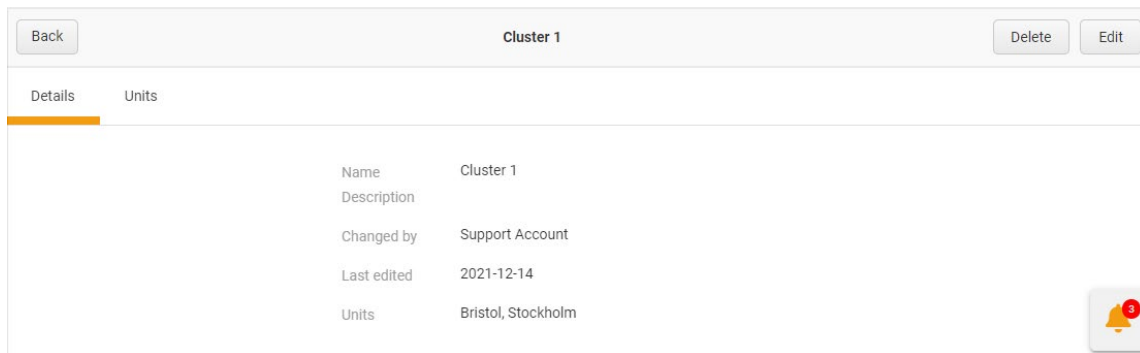


<input type="checkbox"/> Name 	 Description	Units	Last edited 
<input type="checkbox"/> Cluster 1 		Bristol, Stockholm	2021-12-14 Support Account
<input type="checkbox"/> Cluster 2	Units operated by John Smith.		Today Support Account

This will open the selected **Cluster** page where you can view its complete description and details of all the units in this cluster.

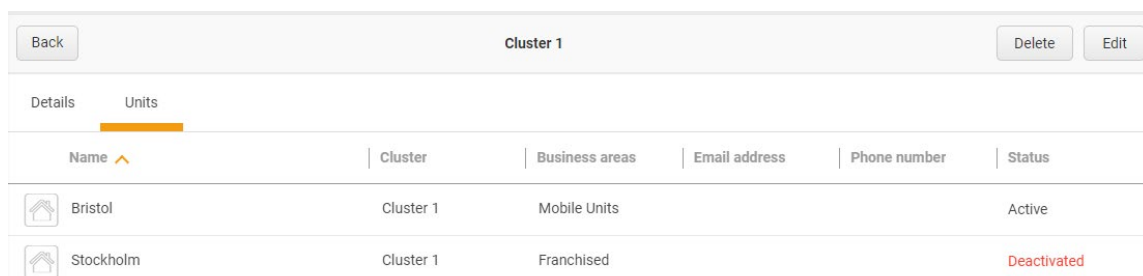
Review the Details of a Cluster



1. On the **Details** tab of the selected **Cluster** page, you can review its name, complete description and units in it. Furthermore, you can also view when and who has last edited it.



2. On the **Units** tab of the selected **Cluster** page, you can view the names of all the units associated with this cluster. Furthermore, you can view the business area, email and phone number of each unit.

You can also view the status of each unit i.e. whether it is currently active or not.



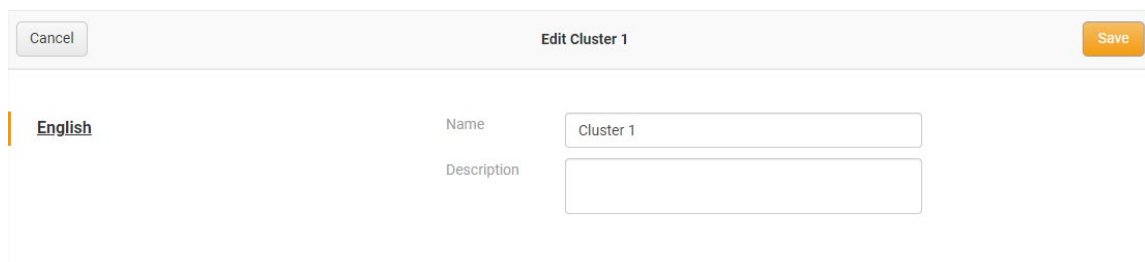
Name	Cluster	Business areas	Email address	Phone number	Status
 Bristol	Cluster 1	Mobile Units			Active
 Stockholm	Cluster 1	Franchised			Deactivated

3. You can review other details of a unit and the users associated with it as well by clicking its name on the **Units** tab of the selected **Cluster** page. [See the User Guide for Units](#)

4. You can edit or delete a cluster by clicking the respective button in the top-right corner of the selected **Cluster** page.

Edit a Cluster

1. On the **Edit Cluster** page, you can update its name and description as demonstrated in the previous section. See the User Guide for **Create a New Cluster**
2. Once you have edited the information you want to update for the selected cluster, click the **Save** button in the top-right corner of the page to save all the changes you have made.



Cancel Edit Cluster 1 Save

English

Name Cluster 1

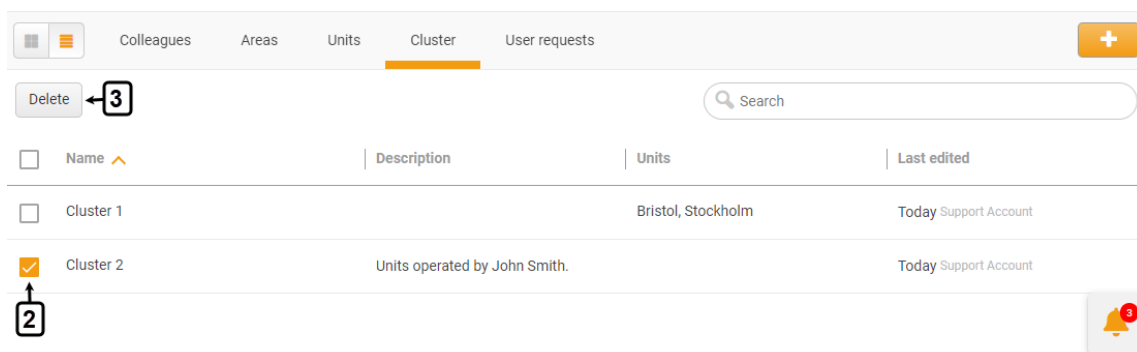
Description

Delete a Cluster

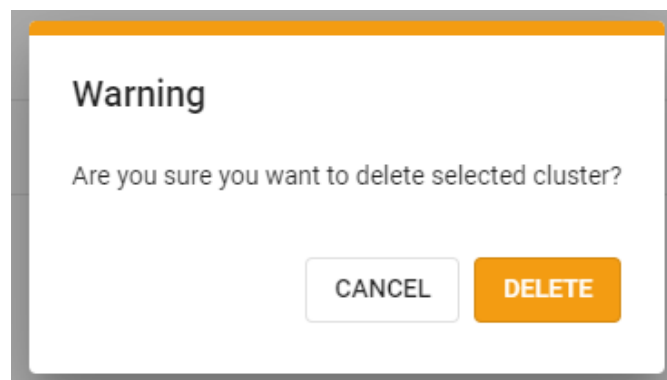
Remember, there is no **Trash** folder for the **Clusters** module on the **Chainformation** platform from which you can restore a deleted cluster. Therefore, when you delete a cluster, the system will delete all the information related to it permanently.

Now, follow the navigation steps demonstrated below to delete a cluster if you do not have any active units in it anymore and want to remove it from your organization.

1. Access the **Clusters** page by following the navigation steps as demonstrated in the previous section.
2. Navigate to the cluster you want to delete and **check** the **checkbox** next to its name.
3. Click the **Delete** button above the list of clusters.



4. You can also delete a cluster by clicking the **Delete** button in the top-right corner of the **Cluster** page you want to delete.
5. Click the **DELETE** button in the pop-up message shown on the screen to delete the selected cluster.



Remember, the system will delete a cluster even if there are still some units in it. However, this will not leave any other effect on the associated units.