Chainformation Admin User Guide
(Areas -Geographical)

Last Updated: December 23, 2023

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

Chainformation allows you to distinguish the local units working in a particular geographical region from other units in your organization by associating them to their respective geographical areas. (See Separate Manual on **Local Units**)

You could name these areas as different countries in which your organization has active business operations. These areas can be further divided into their sub areas and you could name these sub areas as different counties, regions or states in a specific country.

In this way, these internal substructures of a **Chainformation** platform with a role-based structure allows HQ as well as the regional and country managers of your organization to effortlessly manage the local units in their respective areas and sub areas effortlessly. You can also manage their central colleagues and share information with these colleagues in their regional isolated online work space. (See Separate Manual on **Roles Administration**)

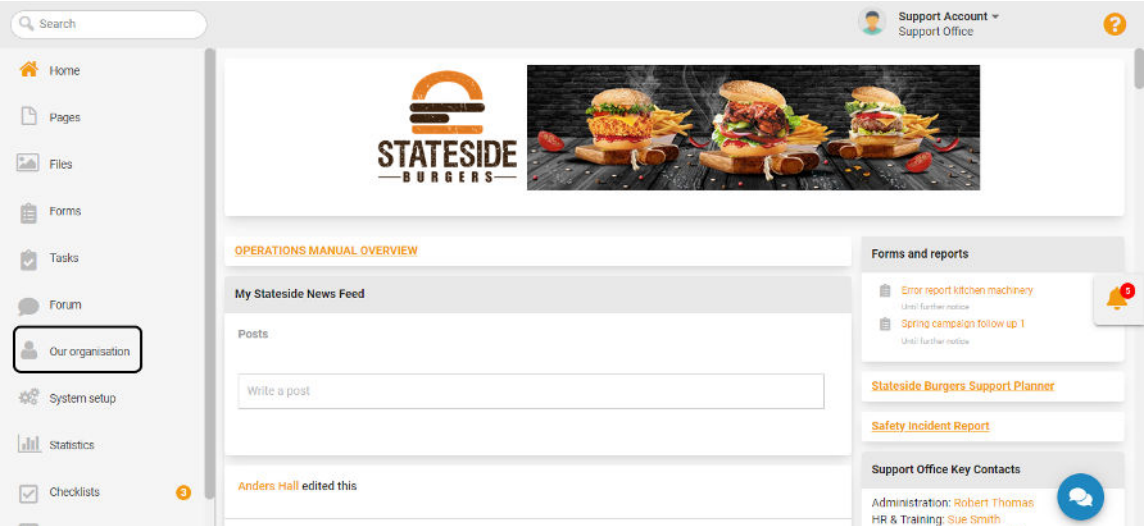
Here is a list of all the features of the **Areas** module that we will discuss in this manual.

- Create a New Area
- View the Existing Areas in Your Organization
- Review the Details of an Area
- Edit an Area
- Delete an Area

Create a New Area

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

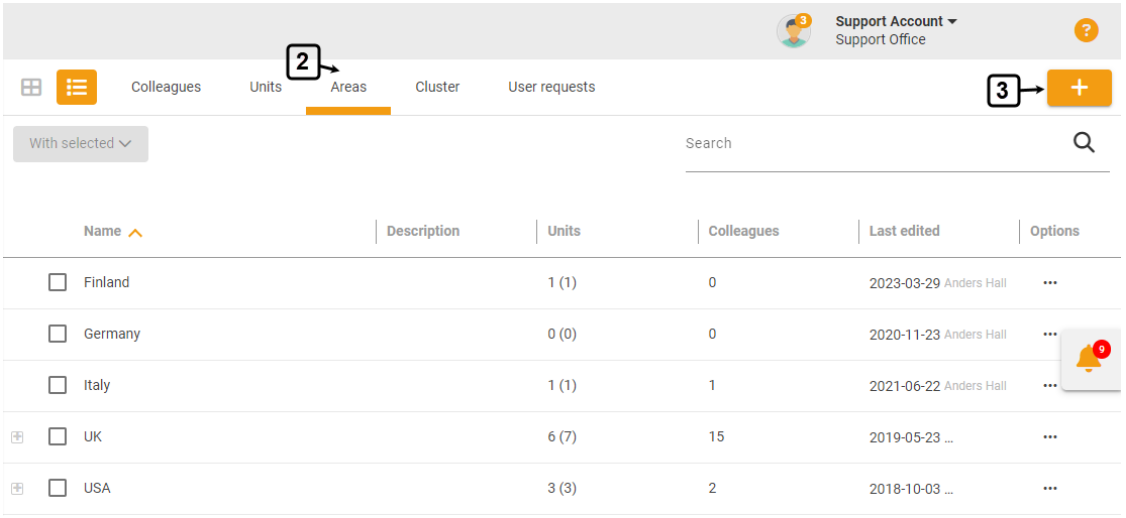
1. Click the **Our organization** button in the left-side menu to open the **Our organization** page.



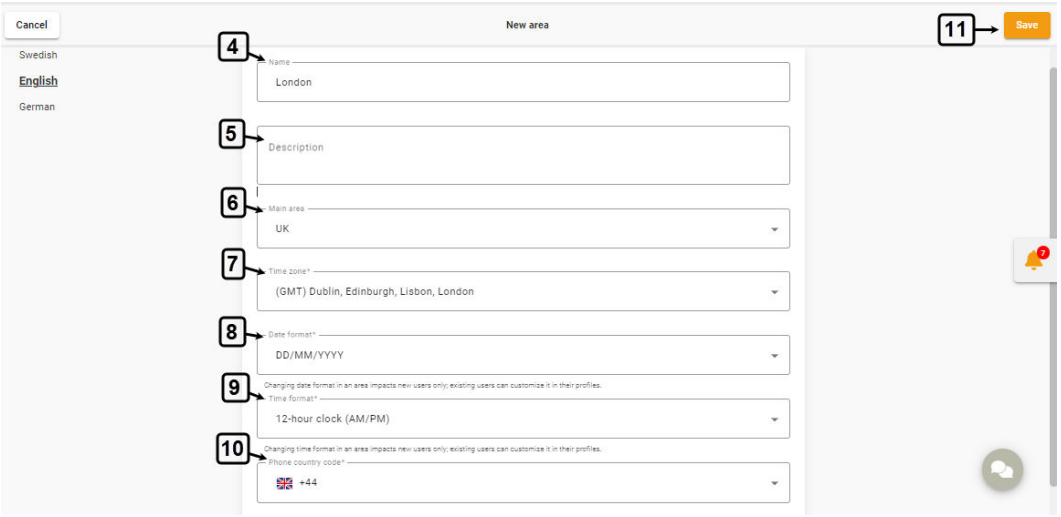
By default, you will be redirected to the **Colleagues** tab.

2. Click the **Areas** button from the header menu of the **Our organisation** page to open the **Areas** tab.

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



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



4. On the **New area** page, enter the **Name** of the new area.

5. Enter a brief **Description** (if applicable) of the new area.

6. Select an area from the **Main area** dropdown list if the new area will be a sub area of an existing main area.

Note: You cannot select an area in the **Main area** field that is already a sub area of another main area.

Remember, when you select such an area in the **Main area** field that has no sub areas before this, then all the units in the selected area will be moved to the new sub area. Furthermore, all the objects shared with the selected area will be shared with the new sub area as well.

7. Select the **Time zone** of the new area.

Note: In the **Time zone** dropdown list, you may not find the name of the city or region in which you are creating the new area. In this case, you should look for a nearby city/region whose time zone is the same as yours.

For example, if you are creating an area in England then you will select London in the **Time zone** field as all of England is in the same time zone.

8. Select the **Date format** of the new area.

9. Select the **Time format** e.g. 24-hour clock or 12-hour clock (AM/PM) of the new area.

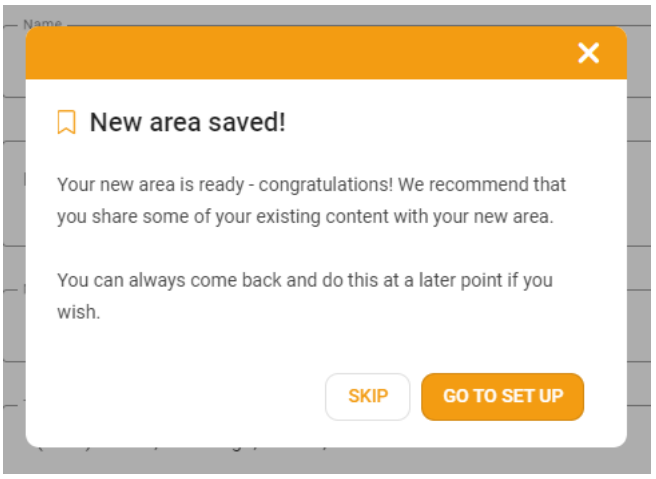
Note: The date and time format of an area will apply to new users whose current unit belongs to the selected area. However, these users can also select a different date and/or time format from their profile settings later. See the User Guide for **Colleagues**

10. Select the **Phone country code** of the new area.

11. Once you have entered all the required details of the new area, click the **Save** button in the top-right corner of the page to add this area to your organisation.

The new geographical area has been added to your organisation and you can associate the new or existing local units with it from now on. See the User Guide for **Units**

After you save the new business area, a pop-up message will show up suggesting you share some of your existing content with this area.



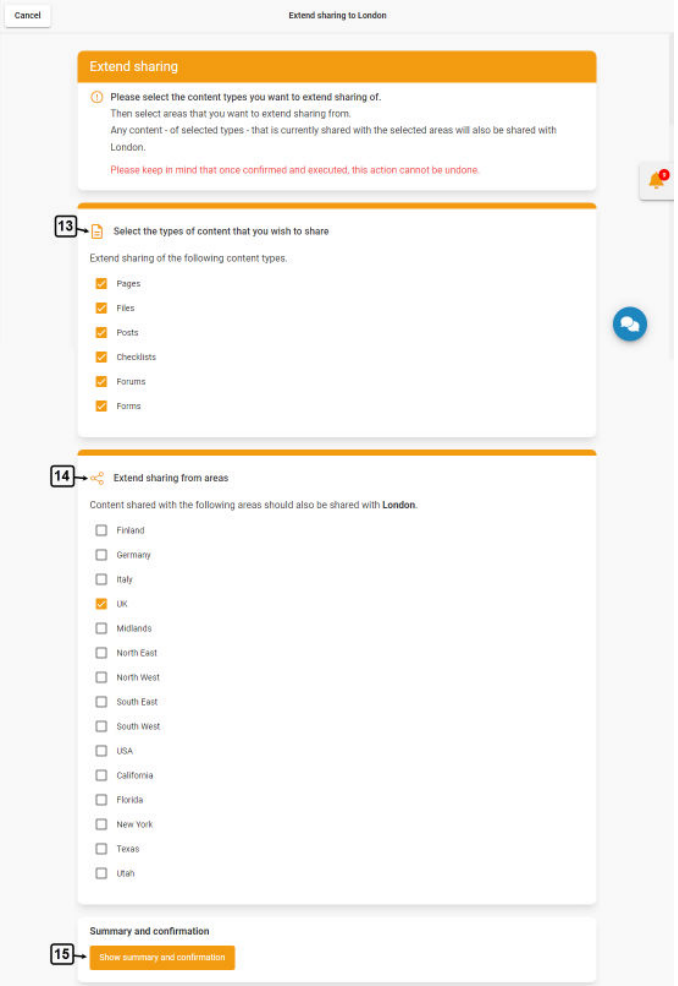
If this is the very first geographical area you have created in your organisation and you do not have any content to share with it for now or want to share the content with it at a later point, you can simply **skip** this message.

12. However, if you have already added some other areas before this one and there is some existing relevant content that could be valuable for the current area, then you should click the **GO TO SETUP** button.

Extend Sharing of the Existing Content to the New Area

Now, you will be redirected to the **Extend sharing** page for the selected area where you can share existing pages, files, feed posts, checklists, forums, and forms with the recently created area.

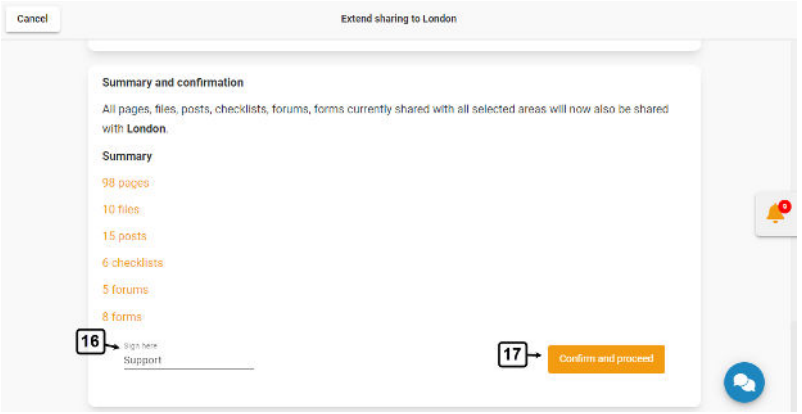
You can share this content with the current area by extending the sharing selection for the content already shared with some other areas in your organisation.



13. **Select the types of content that you wish to share** with the current area.

14. Under the **Extend sharing from areas** list, select the areas content shared with them you also want to share with the current area.

15. Now click the **Show summary and confirmation** button to review the number of each content type that will be shared with the current area once you confirm this action.



Note: Once you have confirmed the selections made on the **Extend sharing** page for the current area, the system will automatically share the selected content items shared with the selected areas, with the current area as well.

However, these selections will be valid only for the existing content and will not apply to any new page, file, post, checklist, forum, or form shared with the selected areas in the future.

Remember, you cannot undo this action from this page once it has been executed if you decide to stop sharing the content shared with the current area in the future.

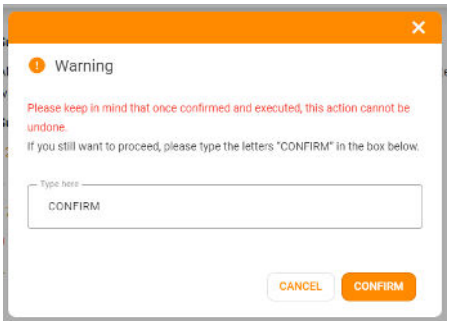
Instead, you will have to stop sharing this content with the current business area one by one by changing the **sharing selection** of each page, file, post, checklist, forum, and form shared directly from the **Extend sharing** page. See the User Guide for **Sharing Selection**

Therefore, carefully review the content types and areas you have selected on the **Extend sharing** page.

16. Once you have reviewed your selections, enter your digital signature in the **Sign here** field in the bottom-left corner of the page.

17. Click the **Confirm and proceed** button in the bottom-right corner of the page to execute the changes you have made.

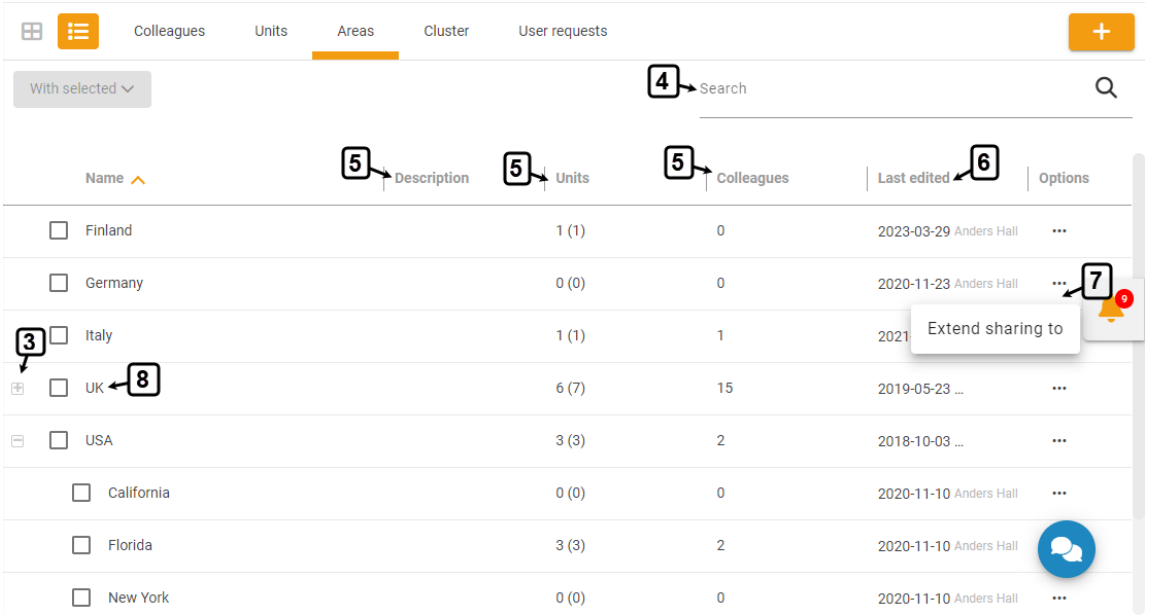
18. Type the letters "**CONFIRM**" in the warning field shown on the screen and click the **CONFIRM** button to extend sharing of the selected content items to the current area.



View the Existing Areas in Your Organization

1. Access the **Areas** tab on the **Our organization** page by following the navigation steps as demonstrated in the previous section.

2. On the **Areas** page, you can view all the existing areas in your organization.



3. You can view the sub areas of a main area by clicking the **Expand** (**+**) button next to its name.

4. You can also use the **Search** field to find an area based on any of the available data/information. <u>See the User Guide for **Search**</u>

5. You can see the description of each area, the number of units in it and the number of colleagues associated with these units on the **Areas** page.

Note: The number enclosed in brackets next to an area name in the **Units** column shows the total number of units in this area. Whereas, the number before brackets indicates how many of these units are active.

6. You can also see when and who has last edited an area.

7. You can share existing content with a business area by clicking the **Extend sharing to** button from its **Options** menu.

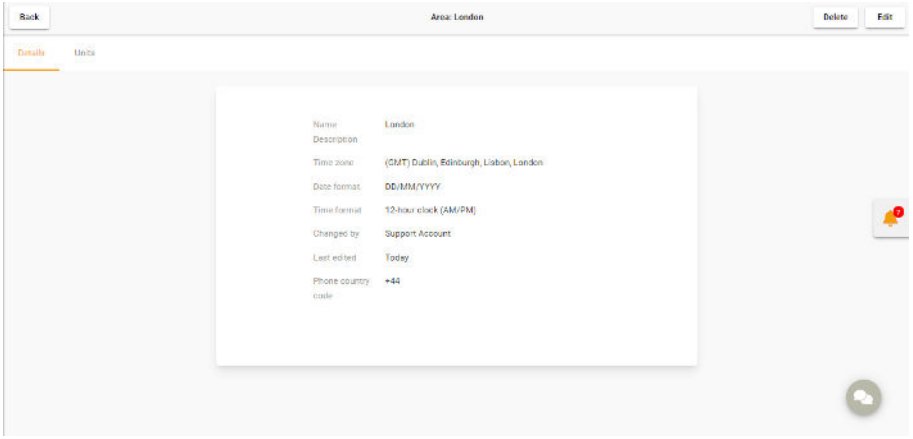
This will open the **Extend sharing** page for the selected area where you can share the existing content with it by extending the sharing selection for content already shared with some other business areas. <u>See the User Guide for **Extend Sharing to a Area**</u>

8. Click the name of an area to view its details.

This will open the selected **Area** page where you can view its complete description, time zone and details of all the units in this area.

Review the Details of an Area

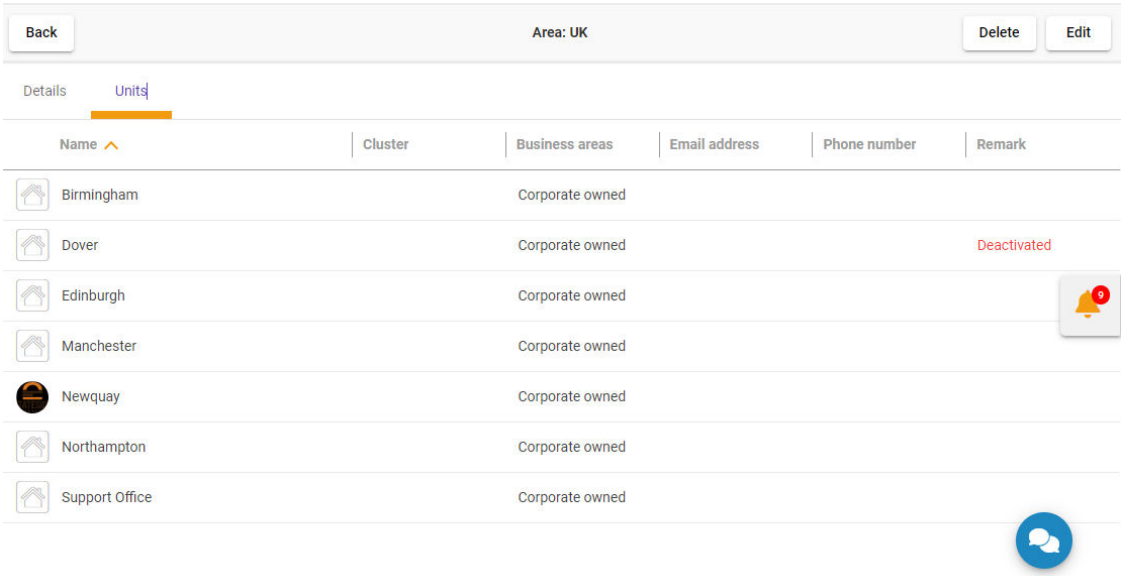
1. On the **Details** tab of the selected **Area** page, you can review its name, complete description (if any), time zone, date format, and country code. Furthermore, you can also view when and who has last edited it.



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

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

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 **Area** page. See the User Guide for **Units**



4. You can edit or delete an area by clicking the respective button in the top-right corner of the selected **Area** page.

Edit an Area

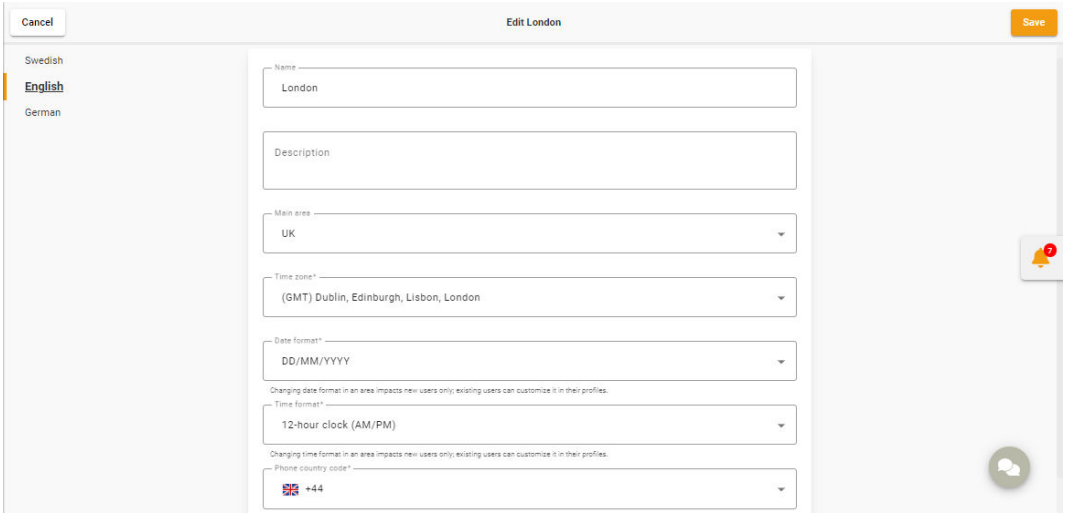
1. On the **Edit Area** page, you can update its name, description, time zone, date format, phone country code and main area as demonstrated in the previous section. See the User Guide for **Create a New Area**

Remember, changing the main area of a sub area will transfer all the units in it to a new region that may cause multiple unwanted changes in the new as well as previous region. Therefore, we strongly recommend you should never change the main area of a sub area once you have established some local units in it.

On the other hand, if you haven't activated any unit in an area yet, then changing its main area wouldn't be a problem. However, when you change the main area of a sub area, don't forget to update its time zone accordingly (if required).

Note: You cannot make an area a sub area of another area if it is already a main area i.e. there are some existing areas that are its sub areas.

2. Once you have edited all the information you want to update for the selected area, click the **Save** button in the top-right corner of the page to save all the changes you have made.



Delete an Area

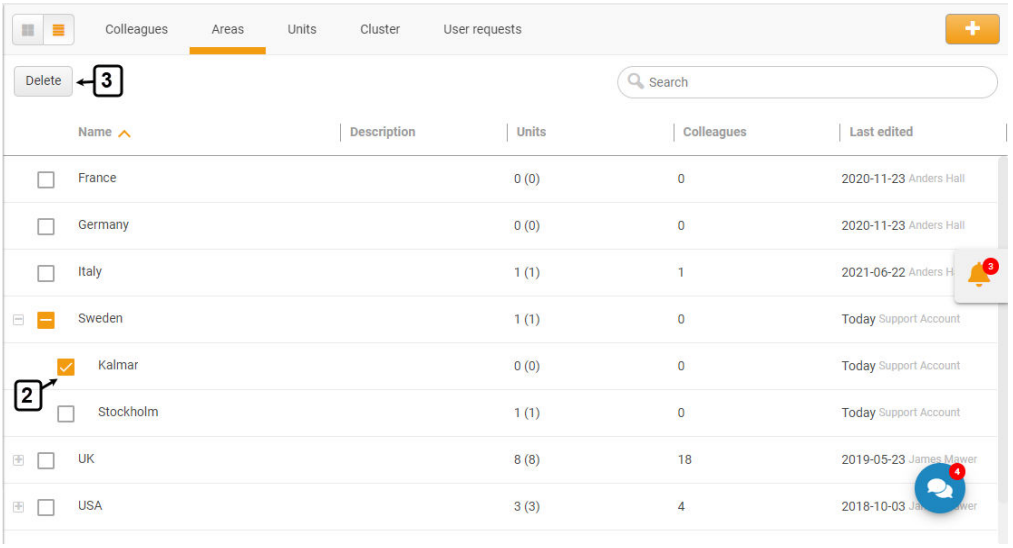
Remember, there is no **Trash** folder for the **Areas** module on the **Chainformation** platform from which you can restore a deleted area. However, you can transfer all the relevant data to another area before deleting an area.

Now, follow the navigation steps demonstrated below to delete an area if you do not have any active business operations in it anymore and want to remove it from your organization.

1. Access the **Areas** page by following the navigation steps as demonstrated in the previous section.

2. Navigate to the area you want to delete and **check** the **checkbox** next to its name.

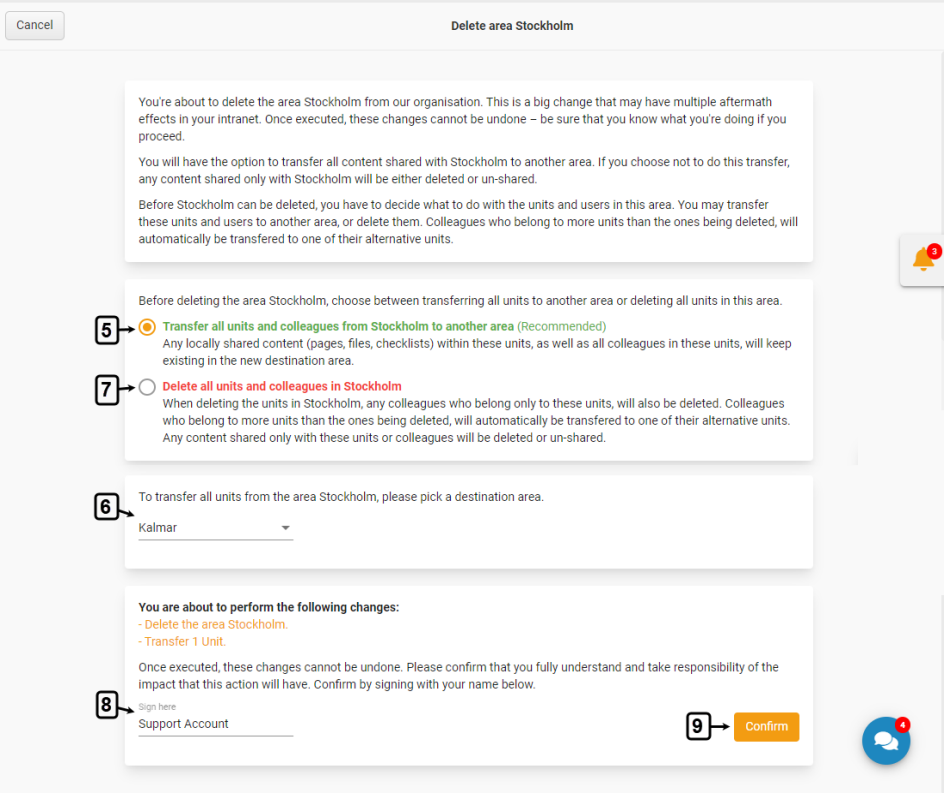
3. Click the **Delete** button above the list of areas.



4. You can also delete an area by clicking the **Delete** button in the top-right corner of the **Area** page you want to delete.

Remember, you cannot delete a main area until you have deleted all of its sub areas before or move them to another main area.

When you click the **Delete** button, you will be redirected to the **Delete area** page for the selected area.



On the **Delete area** page, you will have the option to transfer all the units in the selected area, the users associated with it and the content shared with it to another area.

5. Select the **Transfer all units and colleagues from the current area to another area** option to initiate the transfer process.

6. Pick a **destination area** to which you want to transfer the above mentioned objects.

Now, all the units in the current area, your colleagues associated with these units and any locally shared content (pages, files, checklists) in these units will keep existing in the destination area.

On the **Delete area** page, you can also choose to delete the selected area and its relevant data permanently if it is no more important for your organization.

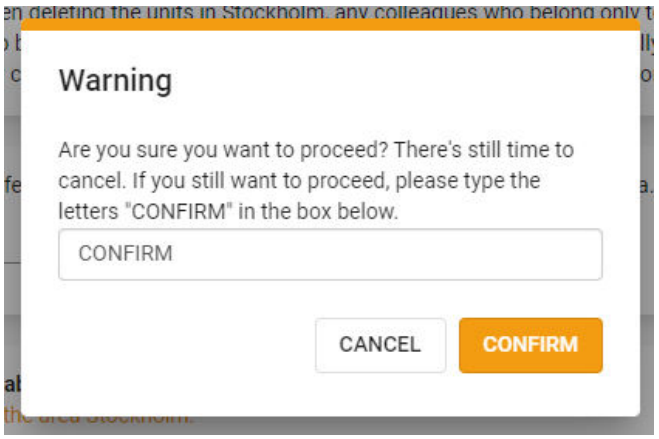
7. Select the **Delete all units and colleagues in the selected area** option to delete these objects permanently.

When you choose to delete the units in an area, all the users who belong only to these units will also be deleted. However, your colleagues who belong to more than one unit and at least one of these units is in another area, will automatically be transferred to one of their alternative units.

Furthermore, any content shared only with the units or colleagues being deleted will also be deleted or un-shared.

Note: You cannot retrieve the deleted units, colleagues and any other data once you have confirmed this action.

8. Once you have chosen the correct option, enter your digital signature in the **Sign here** field in the bottom-left corner of the page.

9. Click the **Confirm** button in the bottom-right corner of the page to execute the option you have selected.

10. Type the letters "**CONFIRM**" in the warning field shown on the screen and click the **CONFIRM** button to confirm your action.