Chainformation Admin User Guide
(System Setup Overview)

Welcome to the **Chainformation** admin user guide. We will guide you through the complete setup of your Chainformation platform in different sections of this manual. This introductory part of the Chainformation admin user guide does not include detailed instructions for any of the modules or features of a Chainformation platform.

Instead, this blog post is only meant to provide you with a brief introduction of each manual we have created to visually explain the complete setup of a Chainformation platform. Now, we will discuss the scope of each manual in the Chainformation admin user guide one by one.

1. Roles Administration

After purchasing a cloud-based Chainformation platform, you need to create different roles with an appropriate access level for each of these roles before proceeding to setup any other module of your organization's intranet. We have thoroughly discussed the roles management including the guidelines for appropriate rights and extended rights for each role in the **Roles Administration** manual.

2. Geographical Areas

Once you are done with your Roles setup, you can proceed to add geographical areas and sub areas to your Chainformation platform. The **Geographical Areas** manual provides an in depth explanation of management of areas and sub areas in your organization.

3. Business Areas

After adding the required geographical areas to your Chainformation platform, you proceed to create business areas for your organization. The **Business Areas** manual provides an in depth explanation of business areas management in your organization.

4. Units

After adding the required geographical and business areas to your Chainformation platform, you can now proceed to add local business units (stores, restaurants etc) in your organization. The **Units** manual provides an in depth explanation of local units management in your organization.

https://chainformation.com/userguides

5. Colleagues

After adding the required local units and associating them with the appropriate areas, business areas and clusters (if applicable), you can proceed to add colleagues (users) to these units. The **Colleagues** manual provides an in depth explanation of users management in your organization.

6. Clusters

Alongwith the geographical and business areas, you can also create business clusters for your organization and add multiple units to these clusters. The **Clusters** manual provides an in depth explanation of cluster management in your organization.

7. Appearance Settings

After creating the required roles for your organization and associating necessary units/users with these roles, you should proceed to manage the layout and graphical appearance of your Chainformation platform. In the **Appearance Settings** manual, we have comprehensively discussed the types of widgets and content items which you can add to Brand your login page, startpage and the sidebar of other pages of your Chainformation platform.

8. Other System Settings

After creating different roles, units, users and customizing your appearance settings, you can proceed to manage the "other settings" of your system setup.

In the **Other System Settings** manual we discuss the following:

- Custom fields
- Request access
- Support contact and SMTP server 9. Manuals for Other Modules

Once you have added your colleagues to their corresponding units, you can start sharing content with them. You can share multiple content items with your colleagues using different modules of your Chainformation platform such as **Files**, **Pages**, **Forms**, **Checklists**, **Messaging**, **Feed Posts**, **Forums**, etc.

We have created separate manuals for each of these modules as well to guide you through how these modules work. Furthermore, some of these modules use the sharing selection feature that allows you to specify the audience for the content which you share with your colleagues. You can get an in depth explanation of how a sharing selection works in the **Sharing Selection** manual.

You can see the navigation steps with visual examples on how to use different features of a Chainformation platform in separate manuals for each one of the above-mentioned modules of your organization's internet.

Note: The Chainformation Admin User Guide mainly addresses features of a Chainformation platform which concerns only the Role of Super Admin. For example, most of the System Setup manuals such as Roles Administration, Appearance Settings, Other Settings and Business Areas are created for Super Admin or a similar role in an organization.

However, you should share the Geographical Areas, Units and Colleagues manuals with the respective central and local admins as well so that they know how they could manage staff in their corresponding areas and units. Furthermore, manuals for content sharing modules might be accessible for everyone on a Chainformation platform as these modules have some relevant information for almost every user in an organization.