My Admin Guide to **Mastering** TeamGuru

TeamGuru

In 1 minute or less

Admin Menu

→ After log in, this is where I find my Administrator portal ...

Click!

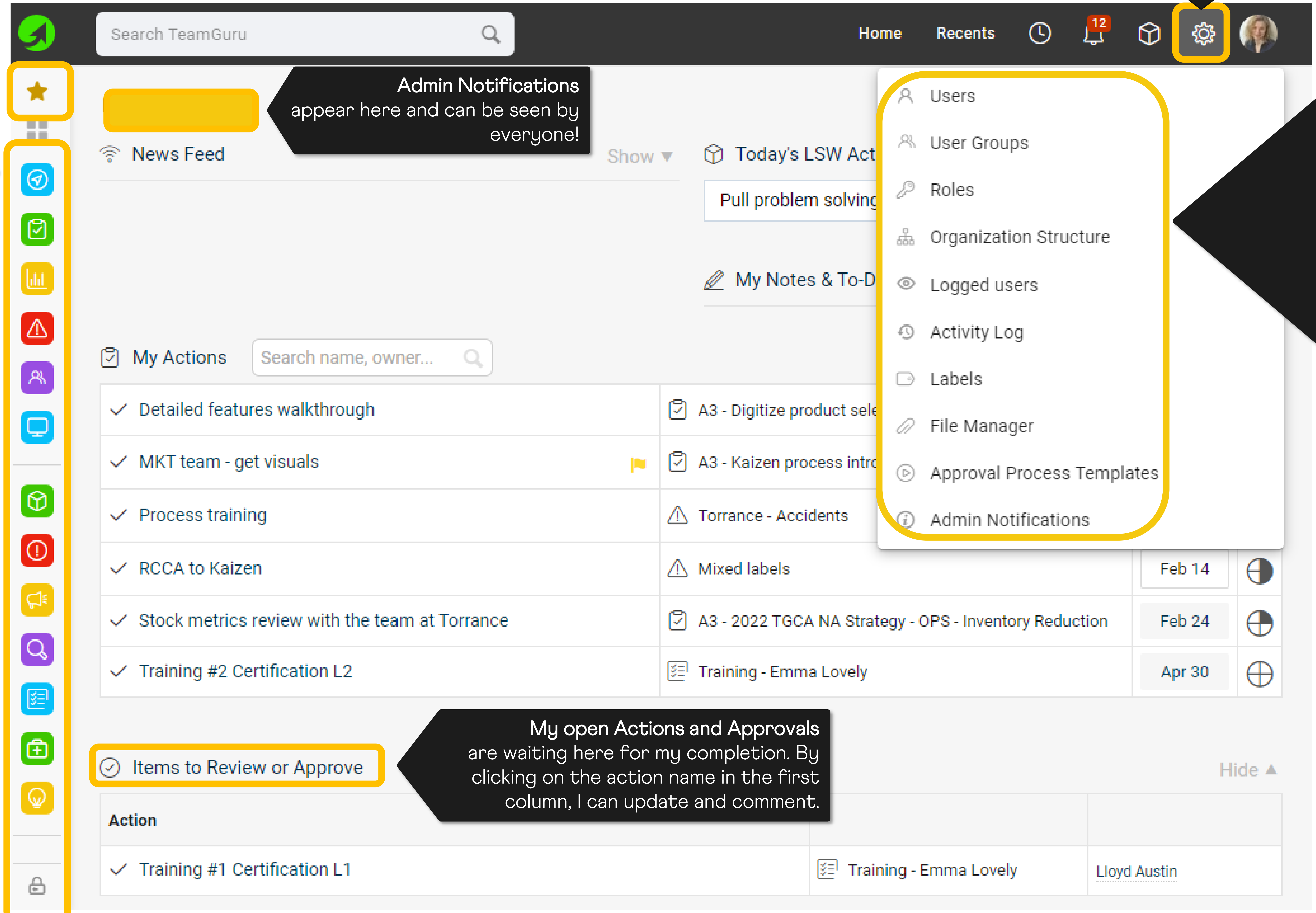
My Favorites

My Modules

Admin Notifications appear here and can be seen by everyone!

My **Admin** options to:

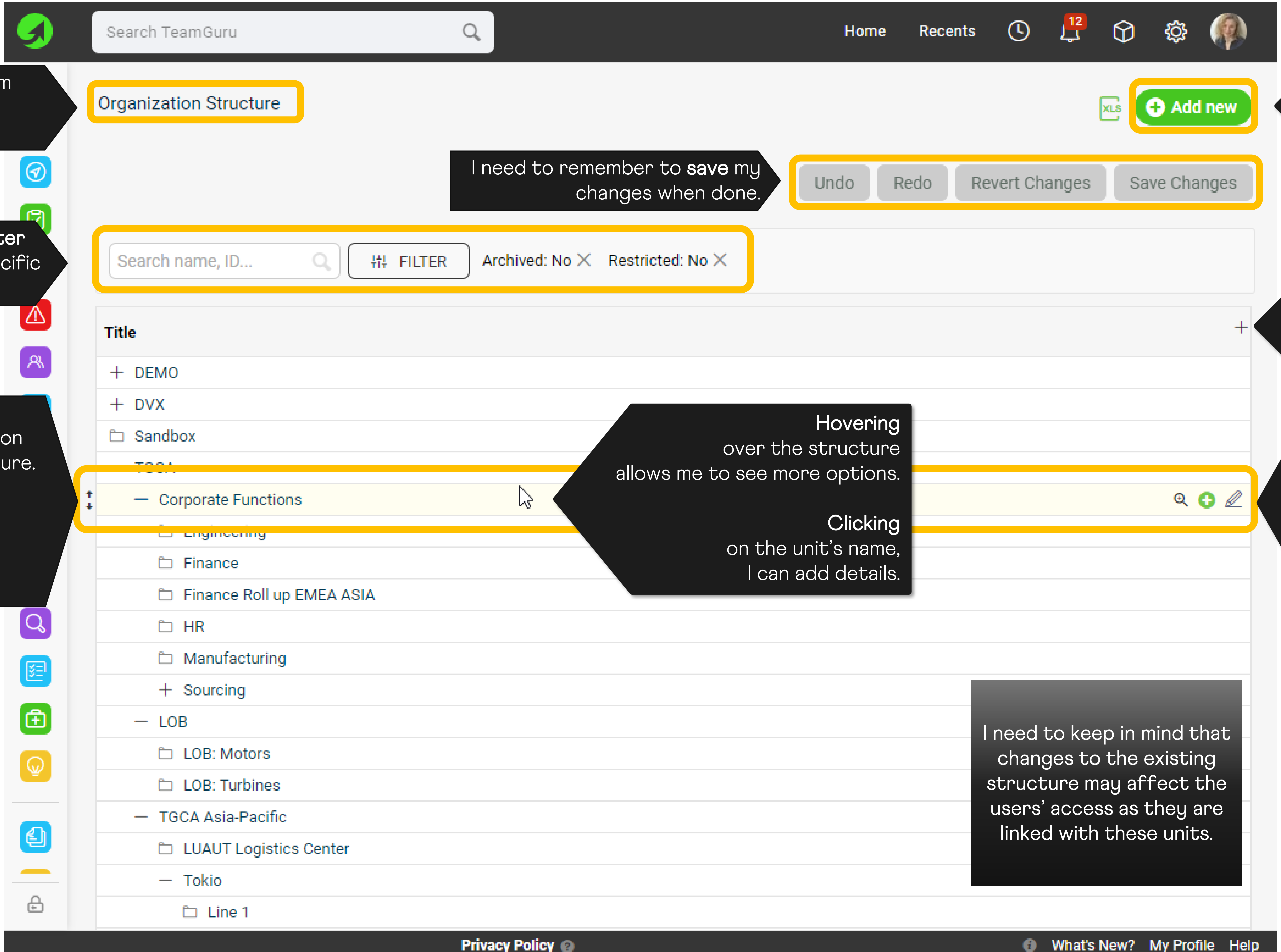
- activate/deactivate users
- create user groups
- establish org. structure
- define user roles
- manage documents and labels
- set approval process
- send notifications
- ... and more!



My open Actions and Approvals are waiting here for my completion. By clicking on the action name in the first column, I can update and comment.

Organizational Structure

→ First, I need to establish my Organizational Structure …



I can check where I am currently **located** in TeamGuru.

I can **create** new org. unit here or add it directly within my structure below.

I need to remember to **save** my changes when done.

I can easily **search** or **filter** my organization for specific entities or units.

I can **collapse** or **expand** my structure for easier navigation

Drag and Drop allow me to drop my selection anywhere within the structure.

Swipe left or right allows me to establish a main folder or subfolder.

Hovering over the structure allows me to see more options.

Clicking on the unit's name, I can add details.

Clicking on **pencil**, I can edit my already created org. unit.

Clicking on the green '**plus**' sign, I can add a new org. unit directly under the selected one.

I need to keep in mind that changes to the existing structure may affect the users' access as they are linked with these units.

User Roles

→ Next, I need to define specific user roles ...

Users
User Groups
Roles
Organization Structure
Logged users
Activity Log
Labels
File Manager
Approval Process Templates
Admin Notifications

Click!

Roles

I need to remember to **save** my changes when done.

× Cancel | Save | Save & Return

DEFINITION

Here I can define the **type** of role I need as well as giving it a clear **name.**

Type: Internal employees / External partners

Title: 01-1 All modules: view

Automations
- Own Automations only
- All Automations

Problem Escalation
- ☑ View
- Edit
- Delete

Each module has its own **options**. Ticking the box next to each option, I am activating it for this role.

Strategy Deployment
- ☑ View
- Edit
- Delete
- Access to private documents

Escalation Problem Types
- View
- Edit
- Delete

Metrics

Templates and attributes are typically reserved for Administrators only.

- Delete metric
- Mass actions with metrics
- Metric Definitions Import
- View Metric Categories
- Edit Metric Groups
- Delete metric groups
- Measures management
- Access to private documents

Escalation Templates
- View
- Edit
- Delete

Skill Matrix
- ☑ View Skill matrix
- Edit Skill matrix
- Delete skill matrix
- View All Skills

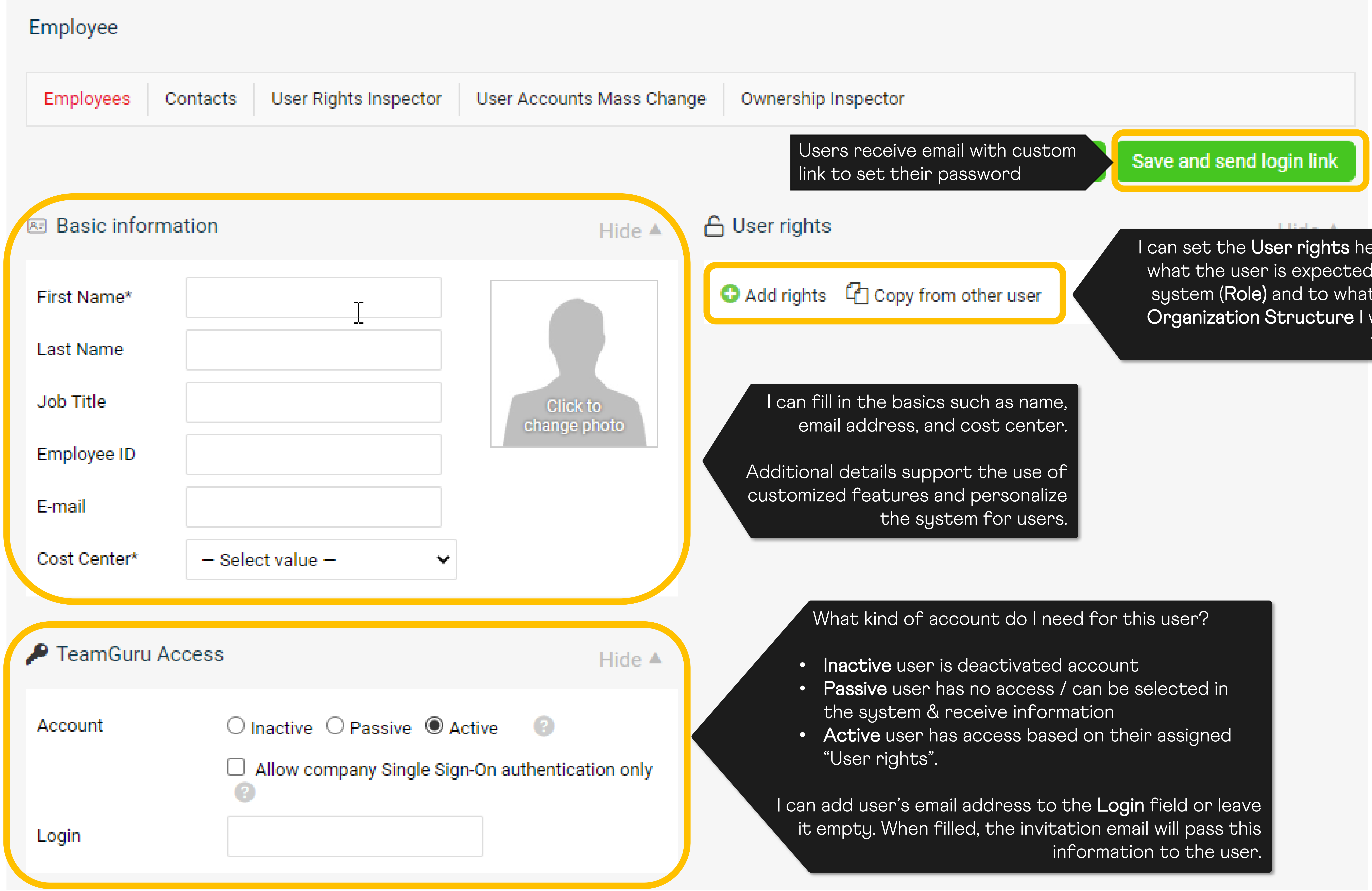
System administrators can set **System** options.

System
- View Users
- Edit Users
- Delete users
- Add users to dashboard
- User mass actions
- View User groups
- Edit User groups
- Remove user groups
- View org. units
- Edit Org. units
- Delete org. units
- View email templates
- Edit email templates
- View roles
- Edit Roles
- Delete roles
- View monthly usage reports
- View forbidden passwords
- Edit forbidden passwords
- Delete forbidden passwords
- Integrations
- Labels

Roles define in detail what any given user privileged with this Role can do within each module.

Any change to the Role automatically influences all users that are assigned this role.

TeamGuru Users → Creating and inviting my colleagues is easy …



Users receive email with custom link to set their password

I can set the **User rights** here, based on what the user is expected to do in the system (**Role**) and to what part of the **Organization Structure** I want to pass those rights.

I can fill in the basics such as name, email address, and cost center.

Additional details support the use of customized features and personalize the system for users.

What kind of account do I need for this user?

- **Inactive** user is deactivated account
- **Passive** user has no access / can be selected in the system & receive information
- **Active** user has access based on their assigned "User rights".

I can add user's email address to the **Login** field or leave it empty. When filled, the invitation email will pass this information to the user.

My TeamGuru → I can support my users with guidelines and training materials ...

User Guide

I can **create** customized educational sections to guide my users based on topics covered.

Start Product Tour

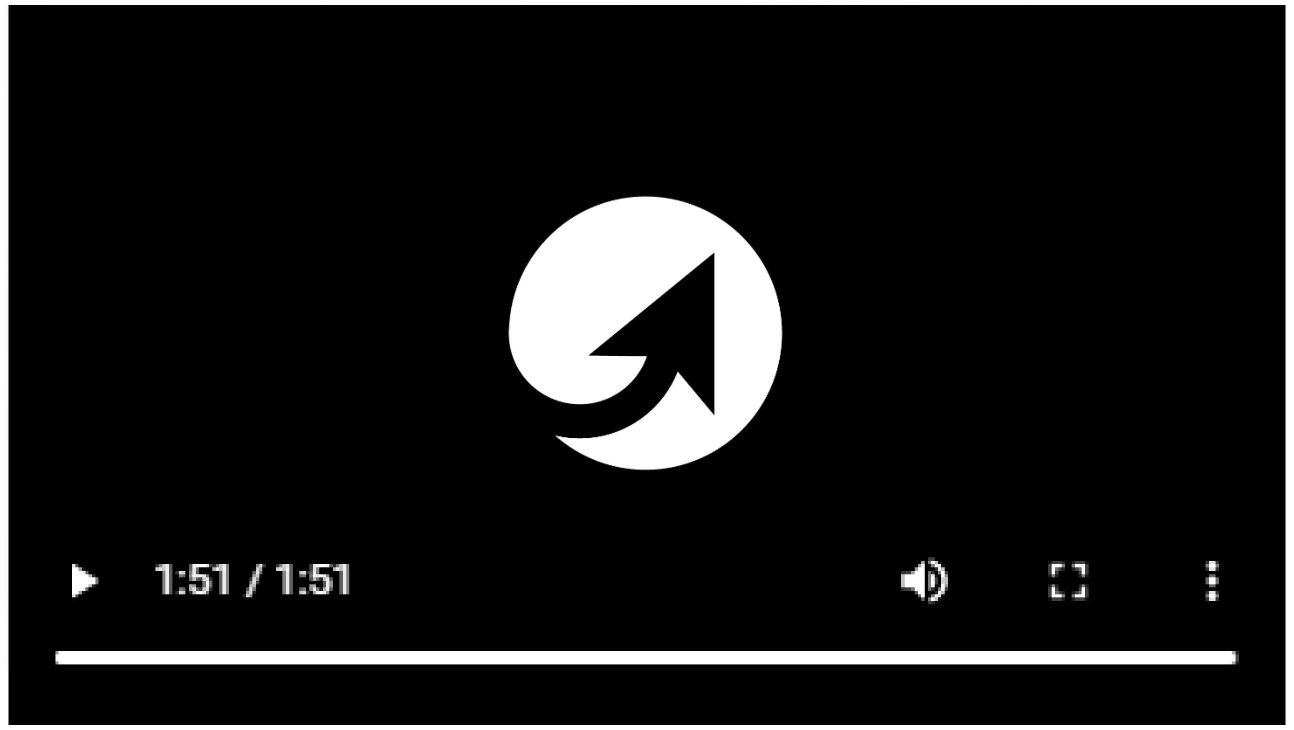
Hide

Each section can be **collapsed** when not needed.

TeamGuru 1-minute Overview

Learn how you can transform your business & impress your boss at https://www.teamguru.com Filmed by Hugo & Oskar – the youngest TeamGuru fans

In each section, I can share **documents**, **presentations**, and **video** guides with my users!



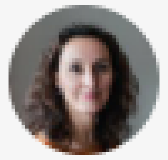
Add Item

I can create new **educational** section here.

Need help?

CONTACT SYSTEM ADMINS

For help with your user rights setup, request for adding new users or org. folders please contact one of your system administrators:



Kate Apking
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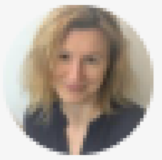
Send Email



Kristýna Gunter
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Send Email

TEAMGURU SUPPORT CENTER

If you are want to learn more about TeamGuru application you can visit the TeamGuru support center portal where you can:

- View Frequently Asked Questions
- Find latest Tips & Tricks
- Contact Support Team
- Submit improvement ideas

I can customize **Help** page to allow my users to instantly learn from prepared user guides.

How do I get there? By clicking on **My Profile** picture at the top right of the page!

My TeamGuru → I have TeamGuru team to back me up ...

We are here to support you

     

support@teamguru.com

support.teamguru.com

Thank you.

TeamGuru