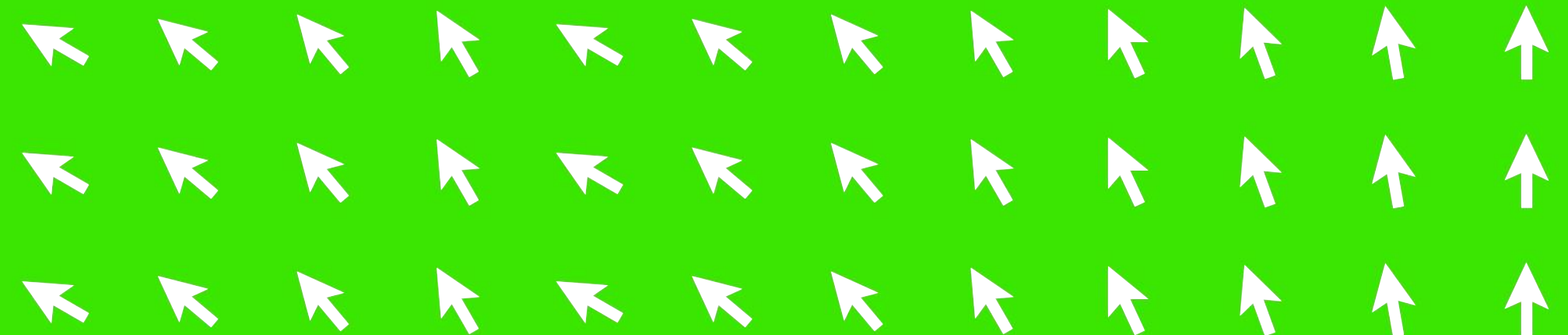


My Admin Guide to Mastering TeamGuru

In 1 minute or less



Admin Menu

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

Click!

My Favorites

My Modules

The screenshot shows the TeamGuru Admin Menu. At the top, there is a search bar labeled 'Search TeamGuru' and navigation links for 'Home', 'Recents', a clock icon, a notification bell with '12', a cube icon, and a user profile icon. A gear icon for settings is highlighted with a yellow box and a 'Click!' label. On the left, there are two vertical menus: 'My Favorites' with a star icon and 'My Modules' with a list of icons. A yellow box highlights the star icon and the 'My Modules' menu. A callout box points to the star icon, stating: 'Admin Notifications appear here and can be seen by everyone!'. A yellow box highlights the 'My Modules' menu. A callout box points to the 'My Actions' section, stating: '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.' The 'My Actions' section has a search bar and a table of actions. A yellow box highlights the 'Items to Review or Approve' section. A callout box points to the 'Items to Review or Approve' section, stating: '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.' A yellow box highlights the 'Admin Notifications' option in the settings menu. A callout box points to the settings menu, stating: '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 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!

Organizational Structure

→ First, I need to establish my Organizational Structure ...

The screenshot shows the 'Organization Structure' page in TeamGuru. At the top, there is a search bar and navigation links for 'Home', 'Recents', and a notification bell with '12' alerts. A user profile picture is visible in the top right. The main content area features a table of organizational units. The 'Corporate Functions' unit is highlighted in yellow. To the right of the table, there are buttons for 'Undo', 'Redo', 'Revert Changes', and 'Save Changes'. A search and filter bar is located above the table, with filters for 'Archived: No' and 'Restricted: No'. A sidebar on the left contains various icons for navigation. A green '+ Add new' button is located in the top right corner of the main content area.

I can check where I am currently located in TeamGuru.

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

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.

I need to remember to save my changes when done.

Hovering over the structure allows me to see more options.
Clicking on the unit's name, I can add details.

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

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

I can collapse or expand my structure for easier navigation

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.

User Roles

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

The screenshot shows a 'Roles' configuration page. At the top right, a sidebar menu is visible with 'Roles' highlighted. Below the menu, there are buttons for 'Cancel', 'Save', and 'Save & Return'. The main area is titled 'DEFINITION' and contains several sections for defining a role's permissions:

- Type:** Radio buttons for 'Internal employees' (selected) and 'External partners'.
- Title:** Text input field containing '01-1 All modules: view'.
- Automations:** Checkboxes for 'Own Automations only' and 'All Automations'.
- Strategy Deployment:** Checkboxes for 'View' (checked), 'Edit', 'Delete', and 'Access to private documents'.
- Metrics:** A list of checkboxes including 'Delete metric', 'Mass actions with metrics', 'Metric Definitions Import', 'View Metric Categories', 'Edit Metric Groups', 'Delete metric groups', 'Measures management', and 'Access to private documents'.
- Problem Escalation:** Checkboxes for 'View' (checked), 'Edit', and 'Delete'.
- Escalation Problem Types:** Checkboxes for 'View', 'Edit', and 'Delete'.
- Escalation Templates:** Checkboxes for 'View', 'Edit', and 'Delete'.
- Skill Matrix:** Checkboxes for 'View Skill matrix' (checked), 'Edit Skill matrix', 'Delete skill matrix', and 'View All Skills'.
- System:** A large list of checkboxes for system-level permissions, including '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', and 'Labels'.

Click!

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

Cancel Save **Save & Return**

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

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

Templates and attributes are typically reserved for Administrators only.

System administrators can set **System** options.

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.

Employee

Employees | Contacts | User Rights Inspector | User Accounts Mass Change | Ownership Inspector

Users receive email with custom link to set their password

Save and send login link

Basic information

Hide ▲

First Name*

Last Name

Job Title

Employee ID

E-mail

Cost Center*



User rights

+ Add rights | Copy from other user

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.

TeamGuru Access

Hide ▲

Account Inactive Passive Active ?

Allow company Single Sign-On authentication only ?

Login

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.

User Guide

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

Start Product Tour

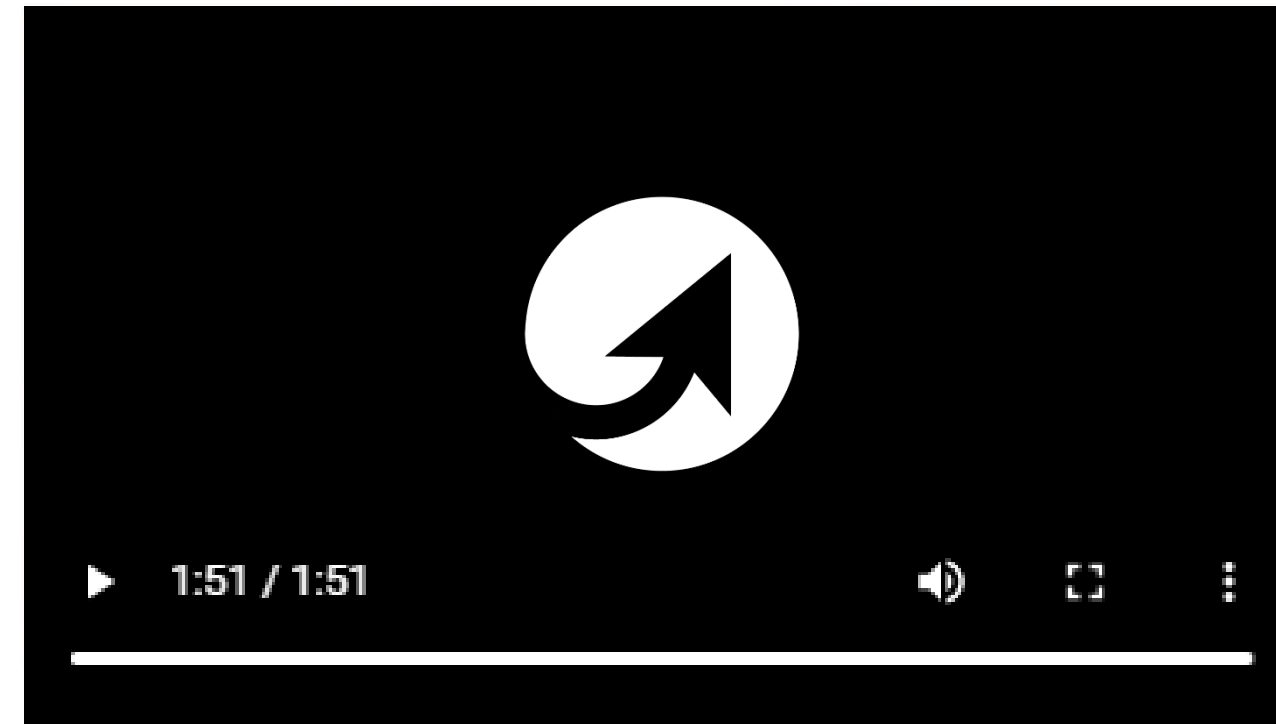
Hide ^

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

kate.apking@teamguru.com

Send Email



Kristýna Gunter

kristyna.gunter@teamguru.com

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.