

GE Administrator Manual

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Chapter One: Gaiho GE Installation

1.1 Required Working Conditions

- Intel Pentium or higher processor
- Microsoft Windows XP (SP1, SP2), Windows XP 64-bit Edition, Windows 2003, Windows Vista.
- Microsoft Internet Explorer 6.0 or above.
- Microsoft Word 2000, Microsoft Word XP or Microsoft Word 2003.
- 512 MB of memory (RAM), 1G recommended.
- 500 MB of free hard disk space for application files plus 250 MB temporary space for installation.

Note: Performance and speed will be enhanced if your computer's processor, memory, and available disk space exceed minimum requirements. Disk space and memory requirements may be higher on some operating systems.

1.2 GE Server

Launch "GEControlXXXX.exe" to install. The procedures involve pages such as "License Agreement," "Gaiho Enterprise Control installation file path," "website port," as shown in figure 1.1 and 1.2:



Figure 1.1

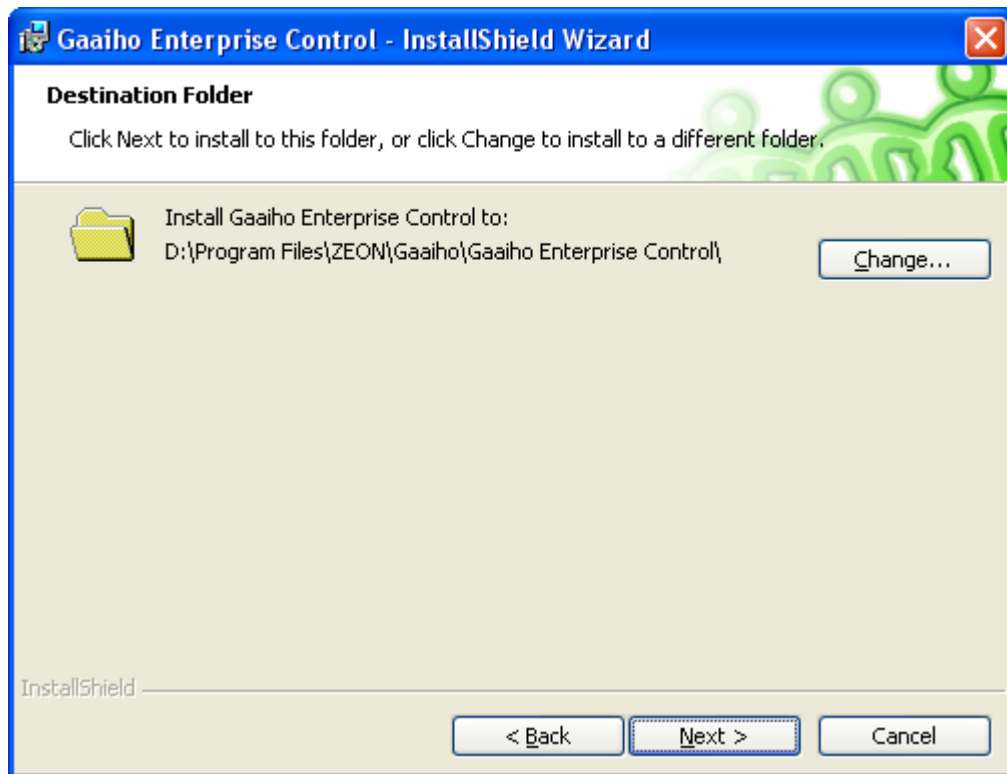


Figure 1.2

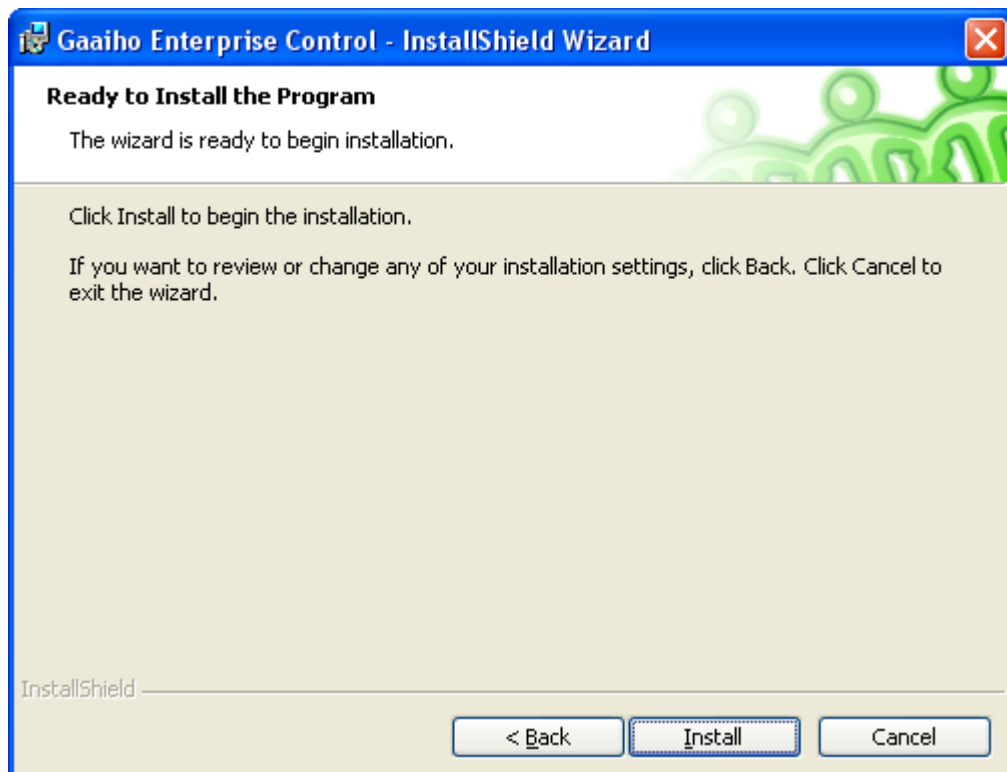


Figure 1.4

After confirming the path, click "Install" to complete the process.

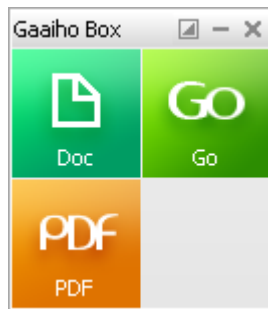
1.3 Gaiho Go Client

It is advised that you should install Gaiho Server and then finish its setup (for detail info please see "Gaiho Server Setup" above) before installing Gaiho Go. After Gaiho installation and setup are completed, begin to install Gaiho Go following these steps:

- Download Gaiho Go

First, download Gaiho Box from http://www.gaiho.com/downres/index_new.aspx and install.

Then open Gaiho Box, click Gaiho Go to download the installer.



Download is completed when the Gaiho Go button brightens and start shining

- Install Gaiho Go

Click Gaiho Go to install. Click "Next" to complete installation.

Chapter Two: Gaiho GE Server Setup

2.1. Server Setup

- Find the file "runtime.xml" under the "bin" folder in Gaiho Enterprise Control's installation directory. Open the file with Windows Notepad as shown below:

```
<?xml version="1.0" encoding="UTF-8"?>
<Setting>
  <Admin Account="" Password=""></Admin>
  <Httpd Port="8080" Website="D:\Program Files\ZEON\Gaiiho\Gaiiho Enterprise
Control\bin\website\" sPort="0" PemFile="" SessionExpire="1800"></Httpd>
  <Log Path="D:\Documents and Settings\All Users\Application
Data\ZEON\Gaiiho\GEGMaster\AppLog\"></Log>
  <Database Path="D:\Documents and Settings\All Users\Application
Data\ZEON\Gaiiho\GEGMaster\Database\"></Database>
  <P2PNet Timeout="60" TryCount="2">
    <ProxySetting Type="0" IP="" Port="1080" Name=""
Password=""></ProxySetting>
  </P2PNet>
  <GEGList>
    <GEG ID="0" Password=""></GEG>
  </GEGList>
</Setting>
```

- You can change GE Server's default port, file path and database file path here

2.3. Open Gaiiho Enterprise Control

- Start menu→Programs→Gaiiho and select Gaiiho Enterprise Control, as demonstrated below:



- Enter the administrator's ID and login password (it is set when you purchase Gaiho Enterprise)
- After login successful, it will display Gaiho Enterprise ID, Name, Status
- Select Gaiho Enterprise, choose "Start up" in right menu
- you will be requested to input GE password. Input the password twice and press "Enter"
- Do not close the console. GE will be launched soon.

Note: Windows Administrator is advised to install and open Gaiho Enterprise Control. Other user accounts might not function normally.

Chapter Three: Basic Instruction for Gaiho GE Server

It includes detailed introduction to Structure, Users, User Permissions, company, computer binding, role setting and visitor.

3.1 Login Management Page

Open your Internet browser, enter the IP for GE and the port for the Server. For example:

The computer which installs and runs GE has the IP 192.168.1.1, server port 8080. Therefore you can open the login page if you enter the IP address in the Internet browser <http://localhost:8080/index.html>:

A screenshot of the GE Administrator Login page. The page has a light gray background with a faint blue and white architectural graphic on the right side. The title "GE Administrator Login" is centered at the top. Below the title, there are two input fields: "Gaiho ID:" and "Password:". Below these fields are two checkboxes: "Remember ID" and "Remember Password". At the bottom of the form is a blue "Sign In" button. The background graphic shows a stylized building with a network of nodes and lines overlaid on it.

Enter the administrator's account & password and login

3.2 License Information

Upon successful login, GE's License Info will be displayed like this:



Save Locally

Upload to Server

License My GE GE Group Project Machine Binding Advanced

GE ID: [REDACTED]
Administrator: [REDACTED]
Start Time: [REDACTED]
Estimated Expiration Date: [REDACTED]
License Type: [REDACTED]
User Count: 100 (Current 0)

Company Information

Company: [REDACTED]
Address:
Zip Code:
Telephone:
E-mail: [REDACTED]

The upper part of the page lists the license expiration date and maximum user number; the lower part lists the detailed user info you have previously input on Gaiho website (when you rent Gaiho Enterprise).

If you need to expand the rent of GE or increase the maximum user number, please relet this GE on Gaiho website

3.3 Structure

3.3.1 Department Management

Add Department

Click "Add"- "Add Department" on the left side of the main interface, See below:

Save Locally

Upload to Server

| License | My GE | GE Group | Project | Machine Binding | Advanced |
|-----------|-----------------|-------------|---------|-----------------|----------------|
| Hierarchy | Enterprise List | Permissions | Roles | Rule | Unjoined Users |

Name:ABC User Limit: 100 Users Added: 2(Users Joined:0)

ABC

Enter the "Add Department" dialog box, fill out the info and click "Ok". See below:

Add Department
✕

Department Name:

Level: ▼

▼

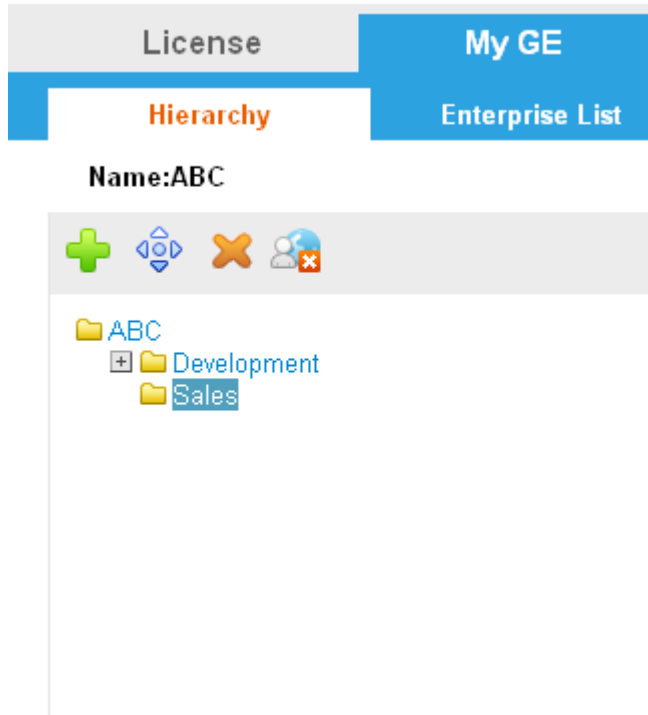
First Column: The name of the department to be established

Second Column: Choose the rank of the department: "above," "subordinate to" or "below". The former two is used to set the rank of departments of the same level, "below" to add branch.

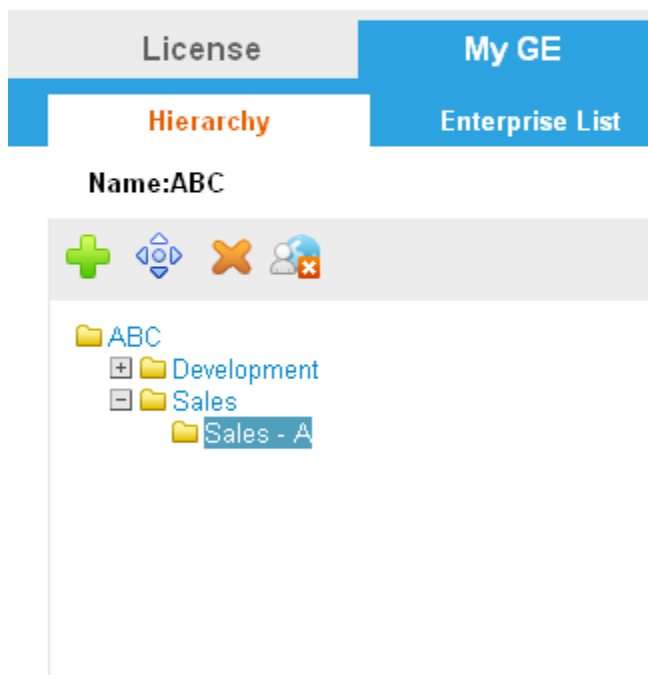
Third Column: Choose one of the existing departments as the referential unit to this new department.

For example, input in order:

Development Dept. → Above → Sales Dept.; therefore the development dept. is higher than Sales Dept. in the structure. See the figure below:



Sales Dept. Section A → Subordinate to → Sales Dept.; therefore this new unit "Section A" belongs to the Sales dept. in the structure. See below:

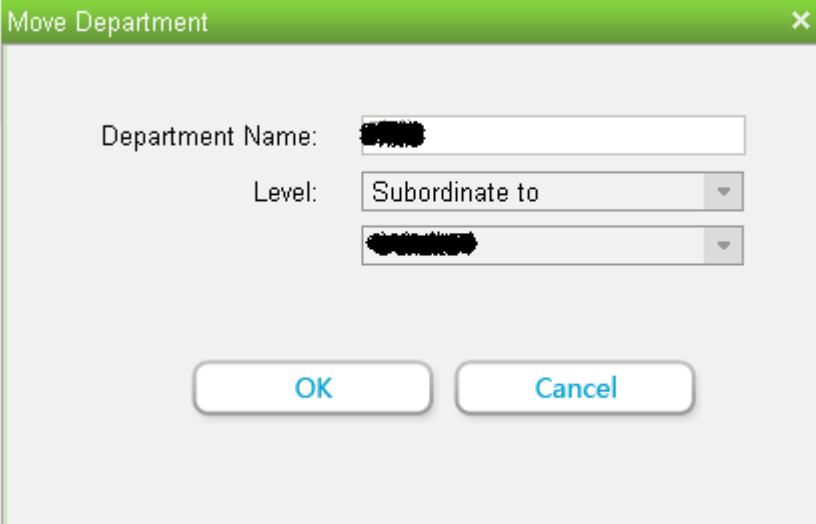


Following the steps above, you can build a complete structure of the enterprise

PS: Don't forget to click the "Save Locally" button on the top right of the interface after adding. The new setting will validate after it is uploaded to the server.

Move Department

Select the department to be moved and click the "Move" - "Move Department" button on the left of the main interface, underneath "Hierarchy" column. Then a dialog box appears as shown below:



The screenshot shows a dialog box titled "Move Department". It contains the following fields:

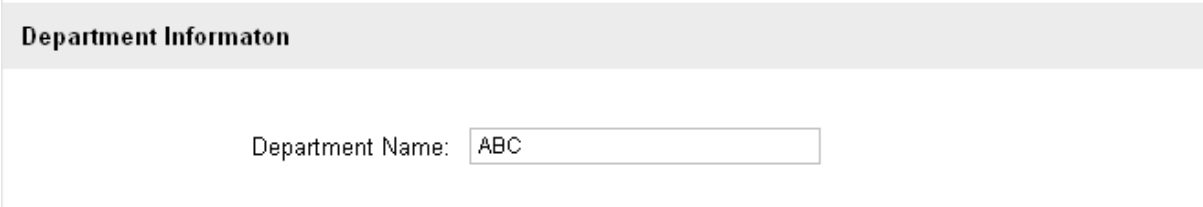
- Department Name: [Redacted]
- Level: Subordinate to [Dropdown]
- [Redacted] [Dropdown]

At the bottom of the dialog are two buttons: "OK" and "Cancel".

Click "OK" to confirm the rank of the department to be moved.

Rename Department

Select the department on the left of the main interface, underneath the "Organization Structure", the department's info will be displayed in below. See below:



The screenshot shows a panel titled "Department Information". It contains a text input field for "Department Name" with the value "ABC".

Here you can rename any existing department

Delete Department

If you need to delete a department, just select the department and click the "Delete Department" button underneath the "Organization Structure" column.

Notice: you cannot delete the department if it contains any user and/or branch. You have to move or delete the user and/or branch to proceed.

3.3.2 User Management

After setting up the departments according to the company's needs, the next step is to add the users.

Below is the introduction of how to manage the users.

Add User

- Select the department in "Hierarchy", and click the "Add"- "Add User" item
- You can also add user directly by clicking the same button

An "Add Department User" dialog box will appear; fill in the info and click "OK", as shown below:

Add Users

Enter E-mail Addresses

* Enter user e-mail addresses. Use ";" to separate: (Max. number:50)

Unregistered IDs will be automatically registered. Please go to Unjoined Users to send a Gaaicho Enterprise invitation to users who have already registered independently.

Department Settings

Department: ABC

Job Title:

Department Head: None

Security Settings

Collaborate with Enterprise: Default Team - All

GE Permission: Default Permission - All

Initial Password (for unregistered IDs)

Password:

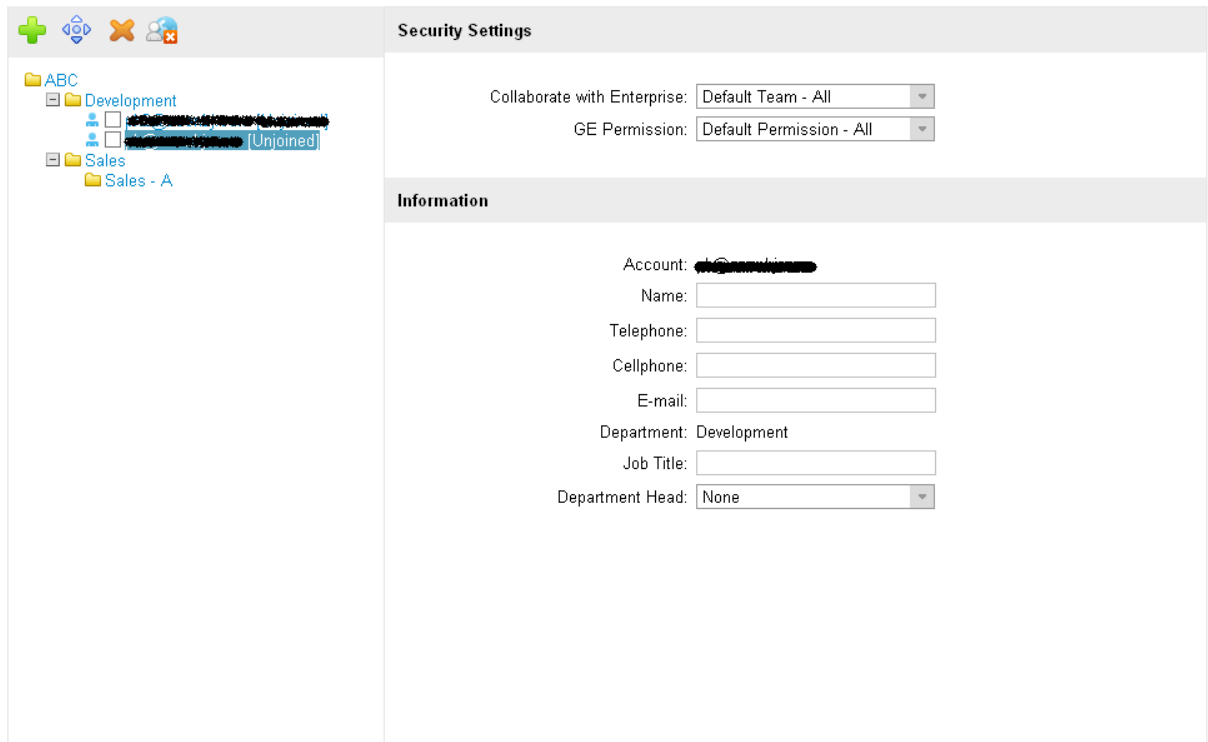
Confirm Password:

OK Cancel

Note:

The items with "*" are required info. For the setting of User Permission and GE Internal View, please see [User Permissions](#) and [Enterprise List](#)

After completed the adding, a new user will be displayed on the "Department User" column. See below:



The "Unjoined" after the User ID signifies the user has not yet to join the GE.

View User Information

Select any user and the user's info will be displayed right. See the figure:

Security Settings

Collaborate with Enterprise:

GE Permission:

Information

Account:

Name:

Telephone:

Cellphone:

E-mail:

Department: Development

Job Title:

Department Head:

Modify User Information

Select the user and edit the info directly in the columns on the interface. Click "Save Locally" button to validate. Please see [View User Info](#)

Delete User Information

Select the user in the "Department Users" column and click the "Delete User" button below. This operation will turn the user's membership from Gaiho Enterprise User into Gaiho Normal User.

Attention: You can only add no more than 50 users at a time. "Add Users" also support direct register of Gaiho ID, bringing great convenience for the administrator. If you need to register account, please enter the initial password; on the other hand, registered accounts will not be affected by initial password, the users still use their own password to sign in.

Setup User Properties

Save Locally Upload to Server

| | | | | | |
|-----------|-----------------|-------------|--------------|-----------------|----------------|
| License | My GE | GE Group | Project | Machine Binding | Advanced |
| Hierarchy | Enterprise List | Permissions | Roles | Rule | Unjoined Users |

Name:ABC User Limit: 100 Users Added: 2(Users Joined:0)

Add Clear All

| | |
|-----------------|--|
| Department Type | Note: The name you entered must be less than 100 characters. |
| Rank | |
| Security Level | |

In order to meet the company's demand on user info, we design "Roles" function to add more detailed info to the company user. Click the "Roles" Tab, show below:

Save Locally Upload to Server

| | | | | | |
|-----------|-----------------|-------------|--------------|-----------------|----------------|
| License | My GE | GE Group | Project | Machine Binding | Advanced |
| Hierarchy | Enterprise List | Permissions | Roles | Rule | Unjoined Users |

Name:ABC User Limit: 100 Users Added: 2(Users Joined:0)

Add Clear All

| | |
|-----------------|--|
| Department Type | Note: The name you entered must be less than 100 characters. |
| Rank | |
| Security Level | |

User Properties are divided into three items: Department Classification, Rank and Security Level. It can set the corresponding rank and security level for each user, and corresponding department classification for each dept. Multiple contents can be set in each property

For more setup measures, see [Head Office Sets GE Group User Properties](#)

3.3.3 Other Settings



- Force User Offline: New setting will validate only after re-login. If you want to validate the setting immediately, select the user and click "Force User Offline" to apply. See below:
- Added Users: The number of added users will be displayed on the top of the Hierarchy interface for the convenience of the administrator. Attention: those users who have not accepted GE invitations also occupy the quota.

User Limit: 100 Users Added: 0(Users Joined:0)

- Unjoined Users

Gaiho Enterprise Control Sign Out
Manage Another GE

Save Locally Upload to Server

License **My GE** GE Group Project Machine Binding Advanced

Hierarchy Enterprise List Permissions Roles Rule **Unjoined Users**

Name:ABC User Limit: 100 Users Added: 2(Users Joined:0)

The following list displays users who already registered their Gaiho accounts independently or previously declined their Gaiho Enterprise invitation. Select the user(s) to send invitations to.

The list does not include users who have been removed from the Hierarchy.

| Name | ID | Status |
|--------------------------|------------|--------|
| <input type="checkbox"/> | [REDACTED] | Wait |
| <input type="checkbox"/> | [REDACTED] | Wait |

Click the "Unjoined Users" button, a new page will appear which shows the list of those users who have registered or refused GE invitations them. You can choose to send GE invitations to those users.

3.3.4 Data Synchronization

Any creation, editing or deletion in the Hierarchy will not validate unless ...

1. Click the "Upload to Server" button on the top right of GE management page
2. The users re-login

3.4 Bindings

Gaiho designs the binding function to restrict the Gaiho GE account to sign in only through its computer. One account can be bound with many computers and vice versa.

3.4.1 Add Bound Account

Click "Machine Bindings"-“Add Users”

Save Locally Upload to Server

License My GE GE Group Project **Machine Binding** Advanced

Machine Binding Add Users

Add by Department Add by Users View Current Results

Select the account to be bound with computer and click "Save Locally". Here is the interface:

Save Locally Upload to Server

License My GE GE Group Project **Machine Binding** Advanced

Machine Binding Add Users

| ID | Binding Status | New Request(s) | Request(s) Declined |
|----|----------------|----------------|---------------------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

Click "Upload to Server" to send the changes to the related accounts via the server. When it signs in Gaiho the next time, a tip will be shown "The administrator invites you to bind your ID with the computer". Click "OK" to send the computer's hardware info to the admin, who will receive a tip. Afterwards, the admin can check "Bindings" on the GE management page. See below:

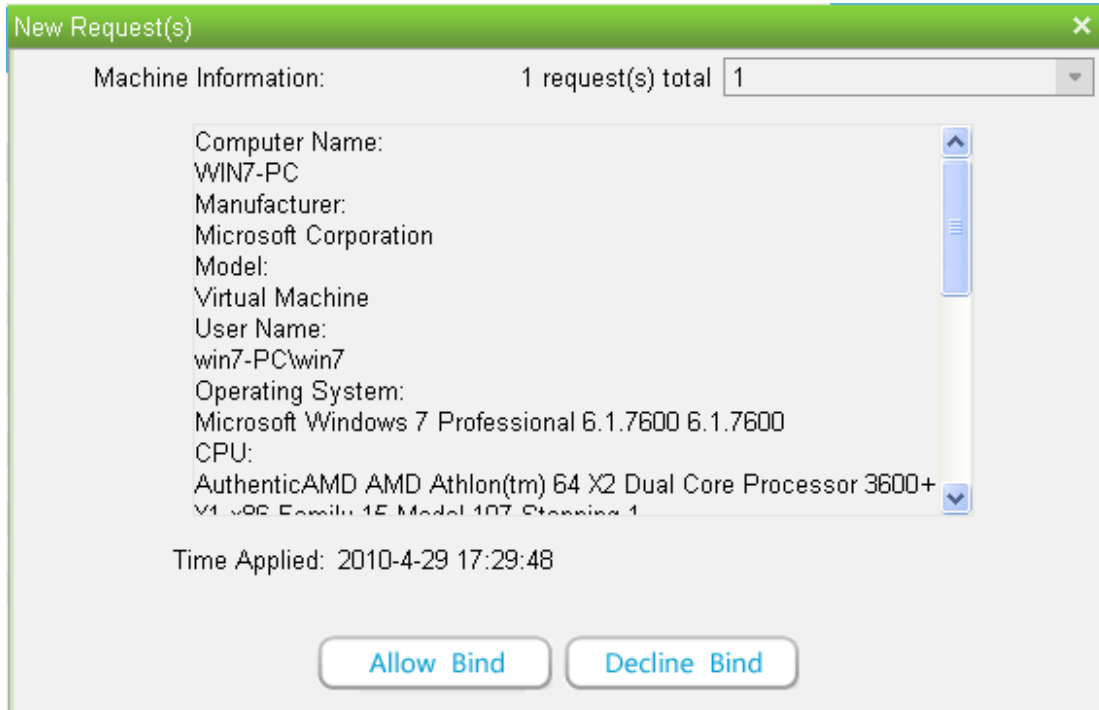
Save Locally Upload to Server

License My GE GE Group Project **Machine Binding** Advanced


Machine Binding Add Users

| ID | Binding Status | New Request(s) | Request(s) Declined |
|----|-------------------|----------------|---------------------|
| | Unbound Computers | 1 | 0 |
| | | | |
| | | | |

Click the number "1" underneath "New Request", an interface appears which displays the computer info. See below:



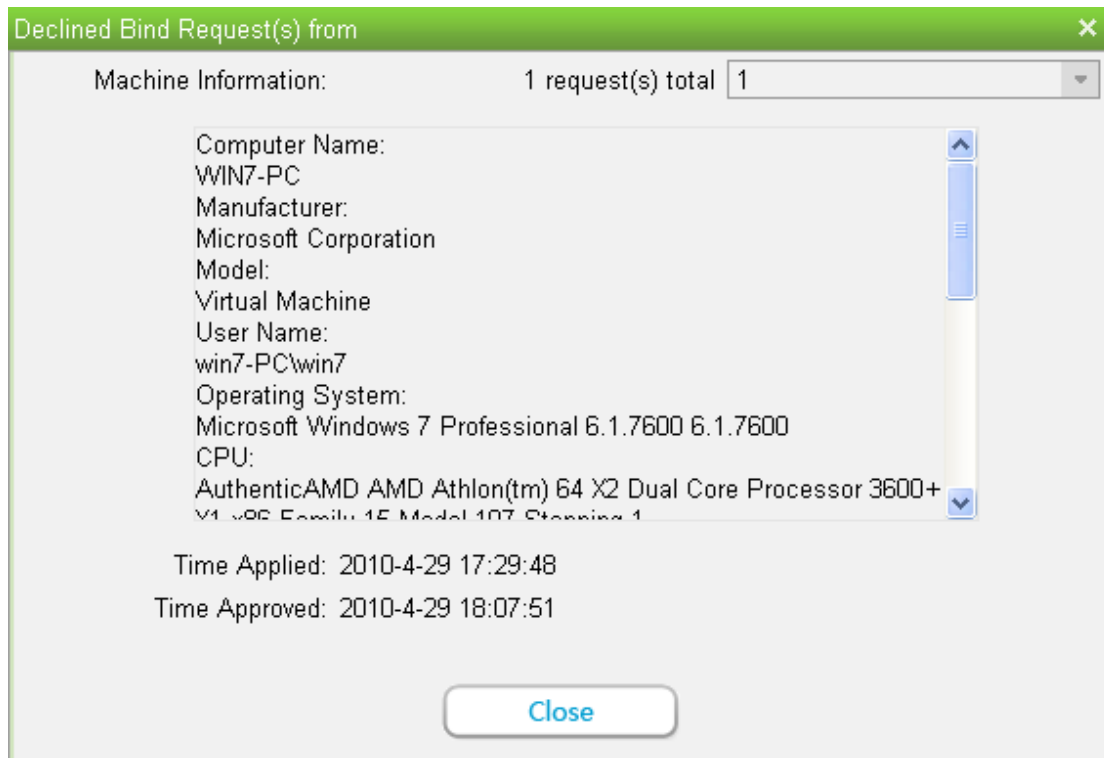
Click "Accept Binding" to validate binding, hence the account can sign in on this computer; click "Refuse Binding" so the account cannot sign in on this computer. You can click the number "1" underneath "Request Declined" to view related info. See below:

 **Gaiho Enterprise Control** Sign Out
Manage Another GE

Save Locally Upload to Server

| License | My GE | GE Group | Project | Machine Binding | Advanced |
|---------|-------|----------|---------|-----------------|-----------|
| | | | | Machine Binding | Add Users |
| | | | | | |
| | | | | | |
| | | | | | |

| ID | Binding Status | New Request(s) | Request(s) Declined |
|----|-------------------|----------------|---------------------|
| | Unbound Computers | 0 | 1 |
| | | | |
| | | | |
| | | | |



If you want to re-bind the account with the rejected computer, delete the account then re-add it , and request again.

One account can bind multiple computers; as demonstrated above, "ph" can send the computer info to the admin on multiple computers. The admin can view multiple requests on the "Bindings" upon received them. The procedures are the same with above.

3.4.2 Unbind Account

Pick the account to unbind in the "Bindings" and click "delete" to decline its binding request. The account can hence sign in through any computer.

3.4.3 Data Synchronization

Any creation, editing or deletion in the Hierarchy will not validate unless ...

1. Click the "Upload to Server" button on the top right of GE management page
2. The users re-login

3.5 Advanced Options

Those Gaiho Enterprise users who reset their passwords will lose all GE info. In this case, GE organization structure is unavailable on Gaiho Go. To restore, the admin has to re-send the GE info to the user. Here are the steps:

- Click "Advanced" on the GE management page
- Click "Resume GE service ". See below:

Save Locally

Upload to Server

License My GE GE Group Project Machine Binding **Advanced**

Resume Service Customize

Users that reset their password can no longer access personal information or receive system updates. Add the user's new account below to resume service.

ABC
 Development
 Sales

- Select users to re-send GE data. See below:
- After selecting, click "Save Locally"
- Click "Upload to Server", and the user who resets password will attain GE data upon re-login.

3.6 Role Settings

Gaaiho's User Permissions, Enterprise List, GE Group View Out/In and etc. are settings which are fulfilled by "Scheme"--different schemes stand for different setting.

3.6.1 User Permission

Explanation

The member's communication access in GE depends on two User Permissions--his or her own and the others. The self User Permissions are divided into three parts in GE:

GE Permissions: the User Permissions inside GE

GE Group Permissions: the User Permissions inside the GE Group

External Net Permissions: the User Permissions on the communication with different Gaaiho Enterprise users or contacts of different companies.

The three major User Permissions have their respective settings:

Enterprise List

Communication in GE: this permits communication with the users in the same GE

GE Group Permissions

Communication in GE Group: this permits communication with the users in the same GE Group

External Net Permissions

Communication with External Net: this permits the communication with the users outside of this Group and GE

Other Permissions

Add Contact to Friendlist: this shows "Friends" item on Gaaiho Go, which can be used to add contacts. Otherwise this item is hidden;

Join a Personal Project: this shows "Personal Project" item on Gaaiho Go, which can be used to create or

join Personal Project. Otherwise this item is hidden;

Sign in as "Invisible": this permits invisible login to Gaiho Go;


Auto-change Status to "Away" after 5 Minutes of Inaction: this will automatically change the user's status to "Away" after 5 minutes of inaction;

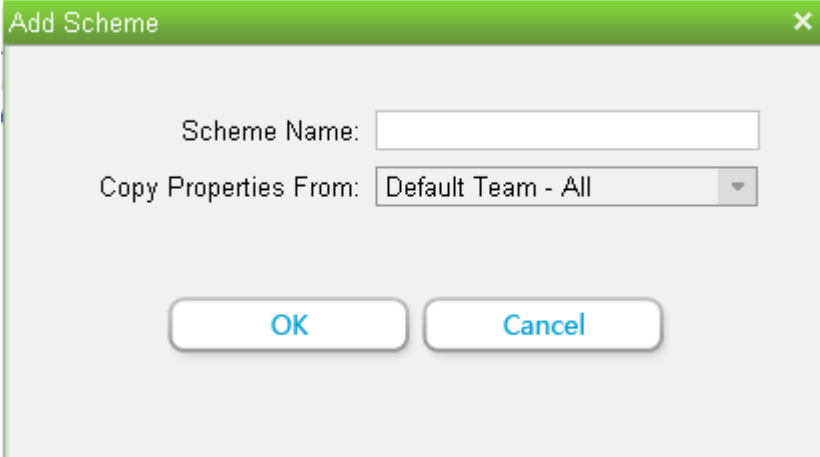
Sign in locally: this permits locally login to Gaiho Go;

Scheme Settings

The system's default: one Scheme which is granted access to communicating with each Enterprise

Add


Click the "Add" button  , a dialog box will appear--fill out the name and a new scheme is created. See below:



Use Existing Scheme as Blueprint: Choose an existing scheme and setup basing on the scheme conveniently.

Pick a created scheme and edit its settings on the right. After it is finished, please click the "Save" button to complete the new scheme.

Rename

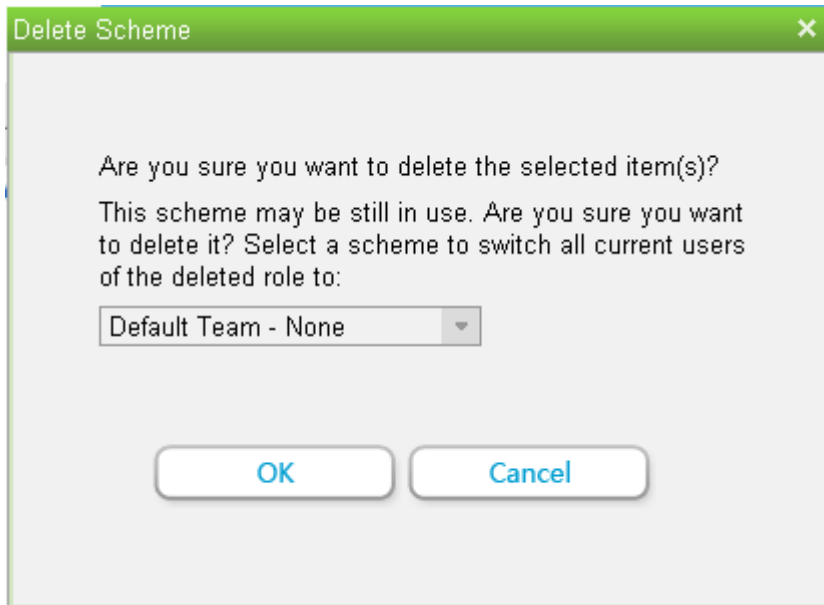
Select the scheme then click "Rename Scheme" button  . Enter the new name for the scheme in the dialog box.

Select the scheme and modify the settings on the right, then click "Save" to validate.

Delete

Select the scheme and click "Delete Scheme" button. Then click "OK" in the popup dialog box.

If the scheme to delete is being used by other user, a dialog box will appear requesting a new scheme for replacement. See below:



Notice: When the last scheme is being used by other user, the scheme is irremovable. Please create a new scheme to replace this scheme to delete.

3.6.2 Enterprise List

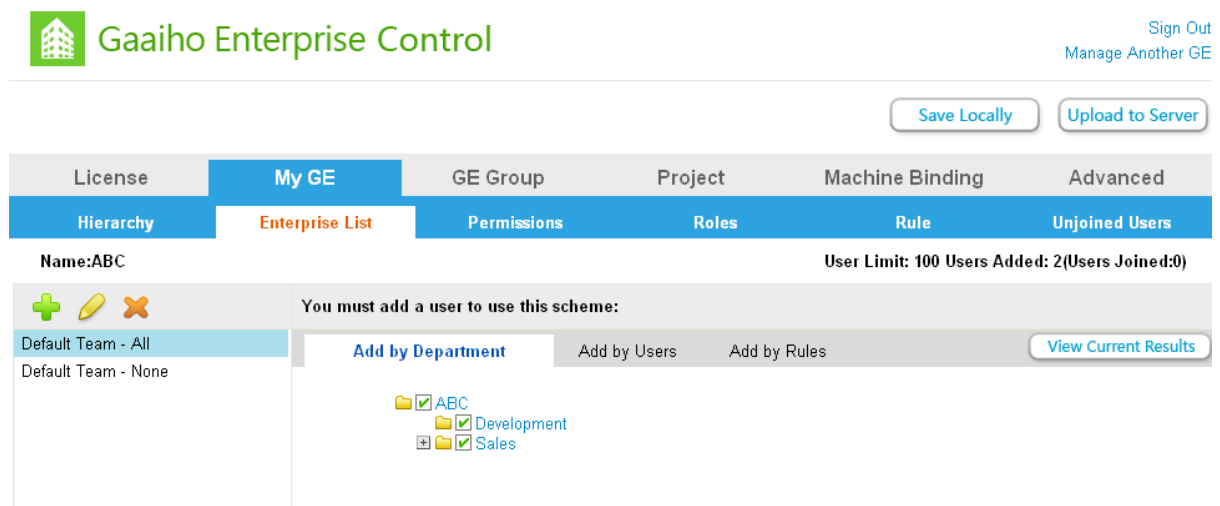
Used to Set how much a GE member can communicate with the company's departments and users

Setup

There are two ways to set up:

Setup by the Company's Department or User

Click "Add by Departments". pick the viewable departments as follows:



Notice: When you click the upper node, all the subordinate departments will be selected as well. If you add new departments later they will also be selected automatically; if you select only all the subordinate departments, the later added departments will not be selected automatically.

Click the "Add by Users". You can add other single user. It is noteworthy that it does not include the selected users in the dept. in the "Add Entire Departments" item. In other words, if you have selected all the GE's departments, there will be no selectable user in this "Add Individual Users".

Add by Rules

If you have set up role in the Enterprise's Hierarchy, you can set the rules through these roles. Here are the steps:

- Click the "Add" button in "Rules" to create a rule which displays all users' roles. See the figure blow:

The screenshot shows the Gaiho Enterprise Control interface. The main navigation bar includes tabs for License, My GE, GE Group, Project, Machine Binding, and Advanced. The 'My GE' tab is selected, and within it, the 'Rule' sub-tab is active. The interface displays a configuration page for a rule named 'ABC'. It shows a user limit of 100 and that 2 users have been added. Below this, there are three input fields for 'Department Type', 'Rank', and 'Security Level', each currently set to 'All'. Each field has an 'Edit' button below it.

Click "Edit" button to set department classification, rank and security level

The screenshot shows the same Gaiho Enterprise Control interface as before, but with a modal dialog box open. The dialog box is titled 'Select Department Type' and contains a list with one item 'ABC' which is checked. At the bottom of the dialog are 'OK' and 'Cancel' buttons. The background shows the same 'Rule' configuration page as the previous screenshot, but it is partially obscured by the dialog box.

Please click "Upload to Server" to validate the settings.

3.6.3 View Out

Set up the GE member's in-group viewable range of other companies' departments and users. The member whose role is set, after login, can contact the company and access its organization structure accordingly.

Notice: The availability of other company's organization structure also depends on the company's GE Group View In; for details, please see [GE Group](#). Further, to contact other company's user, [User Permissions](#) of both sides must be set first.

Setup

Select by User Properties; for instruction, see [Add by Rules](#) in GE Internal Views.

Scheme Settings

See [Scheme Settings](#) in User Permission

3.6.4 View In

Set the in-group viewable range for other companies' users. The company's user whose role is set can access the department which uses the same role in the GE. This setting equals to a defensive mechanism--only the in-group company user who has the role can access the GE's organization structure.

Setup

Select by User Properties; for instruction, see [Add by Rules](#) in Enterprise List.

Scheme Settings

See [Scheme Settings](#) in User Permission

3.6.5 Data Synchronization

Any creation, editing or deletion will not validate unless ...

1. Click the "Upload to Server" button on the top right of GE management page
2. The users re-login

3.7 Customize

After GE user login, you can customize Gaaiho Go's Client Logo and Caption. See below:

Save Locally

Upload to Server

License

My GE

GE Group

Project

Gateway

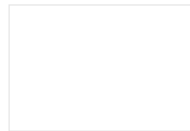
Machine Binding

Advanced

Resume Service

Customize

The logo and caption text will be displayed in Gaiho Go.



Caption:

Logo:

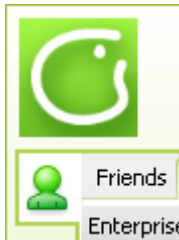
Note: Image types must be in gif, bmp, jpg, or png format. Suggested pixel size is 28x30 and file size must be less than 10 kb.

3.7.1 Modify Client Logo

The administrator click "Customize" on GE management page, and then click "Browse..." to select your picture file. After uploading is completed, a preview of the logo will be displayed on the left side of the page.

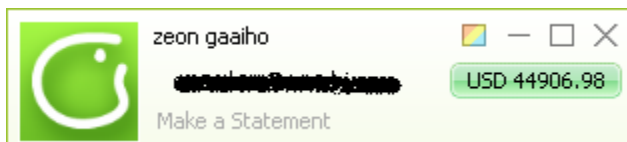
Notice: the picture format for upload can only be "gif, bmp, jpg or png". Default setting is Gaaiho Go's original logo.

After modification, click "Upload to Server" on the top right of the page to validate the new settings. The logo of "Contact" Tab will be changed as shown below:



3.7.2 Modify Client Window Caption

The administrator enters the caption and click "Save All Changes". After re-login, Gaaiho will display the customized content. See below:



3.8 Project

Create a project so that the GE users and non-GE users can communicate with each other in one group. You can manage project on the page after you purchase GE Project. See below:

Save Locally Upload to Server


License My GE GE Group **Project** Gateway Machine Binding Advanced

All Projects Allowed Creators


Total Projects: 1

| | | | | | |
|---|--|------------|------------|------------|------------|
| <p>ABC</p> <p>Sales Schedule(66956)</p> | <p>ID: [REDACTED]</p> <p>Created: [REDACTED]</p> <p>Project Manager: [REDACTED]</p> <p>Current Users: 2</p> <p>Member List:</p> <table border="1" style="width: 100%;"> <tr> <td>[REDACTED]</td> <td>[REDACTED]</td> </tr> <tr> <td>[REDACTED]</td> <td>[REDACTED]</td> </tr> </table> | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | | | | |
| [REDACTED] | [REDACTED] | | | | |

3.8.1 Delete Project

Select the project team and click the "Delete" button ; then click "OK" in the dialog box.

3.8.2 Set Leader

Click the "Set Leader" button  and select a user as the leader of the project in the dialog box. The Gaiho Go user will be granted the permission to manage the project team. See below:

Set Leader

Select Project Leader:

2@234.com

OK Cancel

3.8.3 Data Synchronization

Any creation, editing or deletion in the Organization Structure will not validate unless ...

1. Click the "Upload to Server" button on the top right of GE management page
2. The users re-login

3.9 GE Group

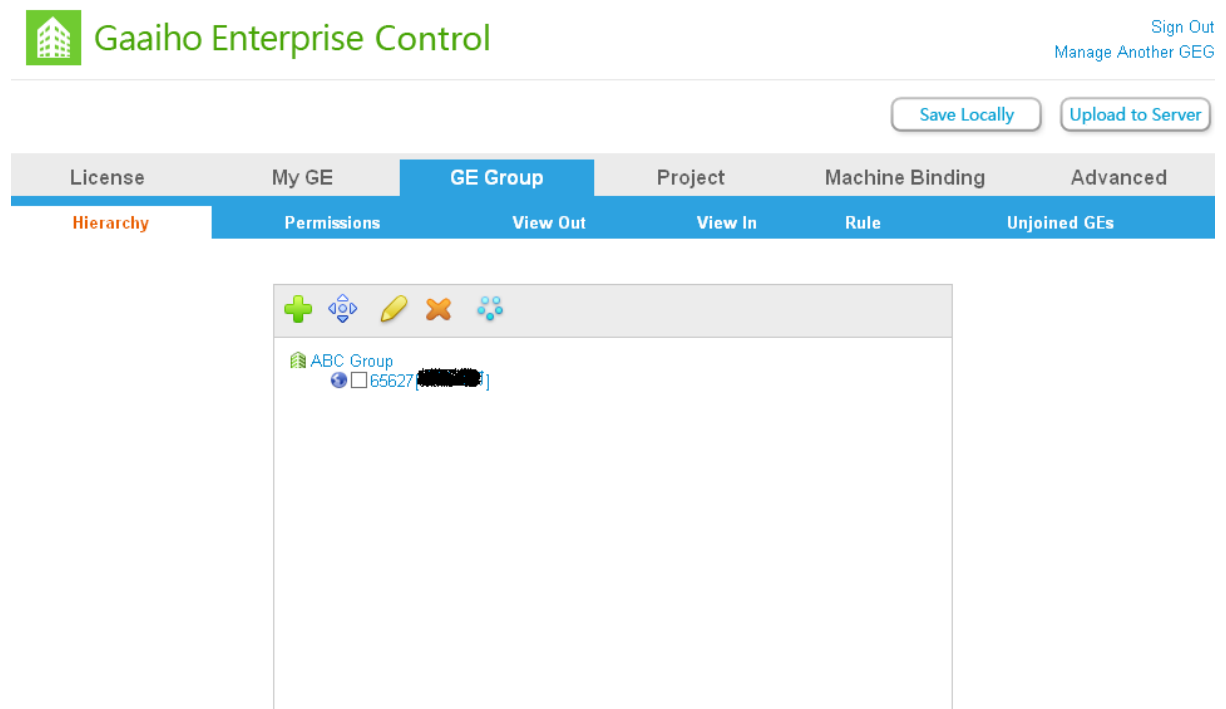
A group consists of multiple GEs which are arranged by the head office in the group structure. They can view the organization structures of different GE and contact members following the regulations.


The head office establishes the group--one group, one head office, which possesses the rights to manage organization structure, group members, set user properties, delete group.

Click "GE Group" on the GE management page, a page will appear like this:



Click "Create a GE Group" and enter the setup page. See below:




Notice: the default name is "New GE Group"; you can select the group and click "Rename Division" 

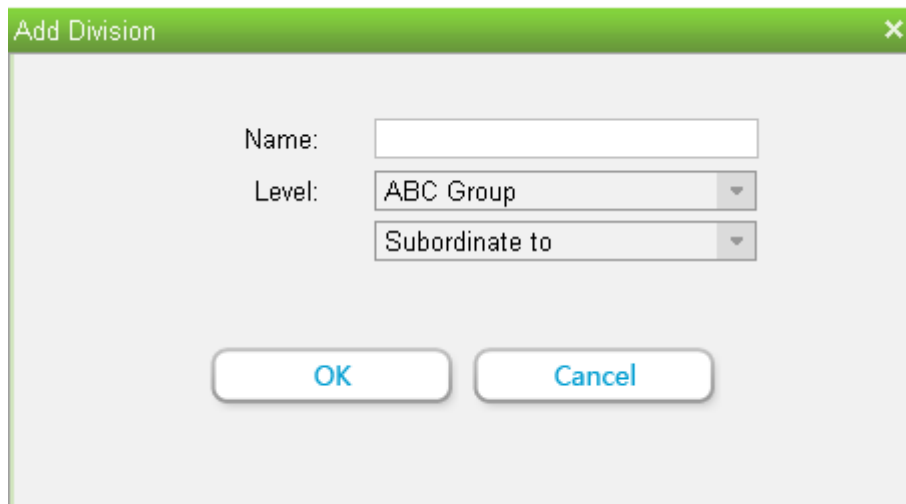
to create a new name.

3.9.1 Head Office Manages GE Group Structure

It is used to organize the structure of the entire company . Put each GE into different divisions, creating a intuitionistic manifestation of the company's exact position in the group.

Add Division

Click "Add Division"  and a dialog box shows up like this:



Add Division

Name:

Level: ABC Group

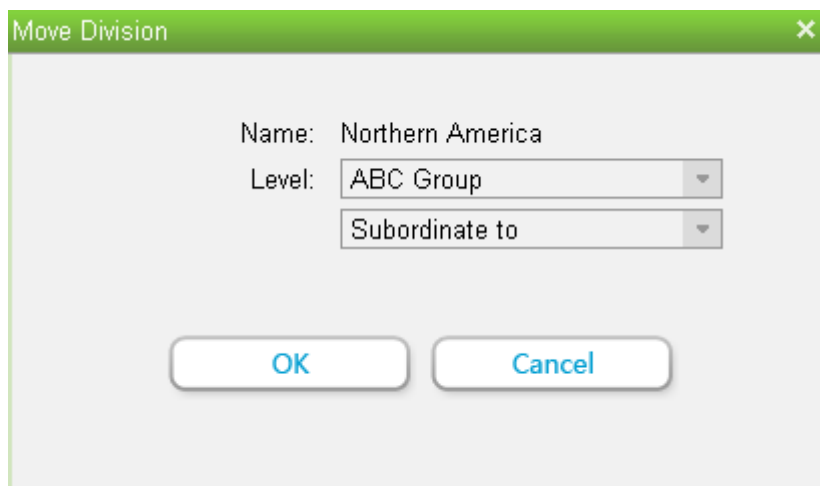
Subordinate to

OK Cancel

The setting procedure is the same as [Add Department](#)'s in GE Organization Structure. Provided we set the name "Northern America Division", there will be a new division with an identical name. You may put corresponding GE into this division.

Move Division

Select the division and click "Move Division"  button in GE Group Structure column. Here shows a dialog box:



Move Division

Name: Northern America


Level: ABC Group

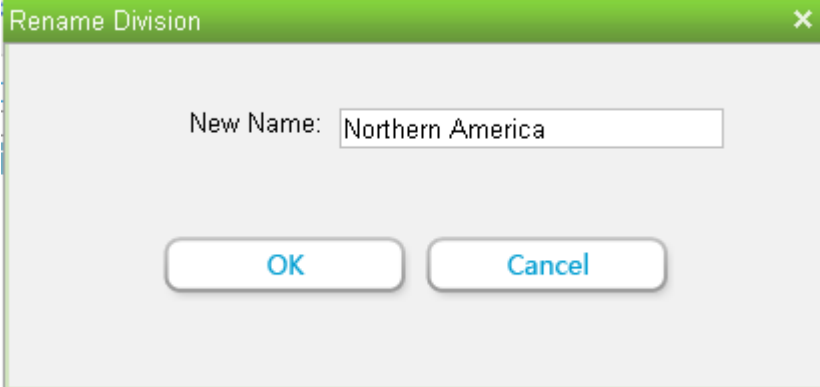
Subordinate to

OK Cancel

The setting procedure is the same as [Move Department](#)'s in GE Organization Structure.

Rename Division

Select the division and click "Rename Division" button  in the GE Group Structure column. A dialog box will appear:




Enter the new name and click "OK".

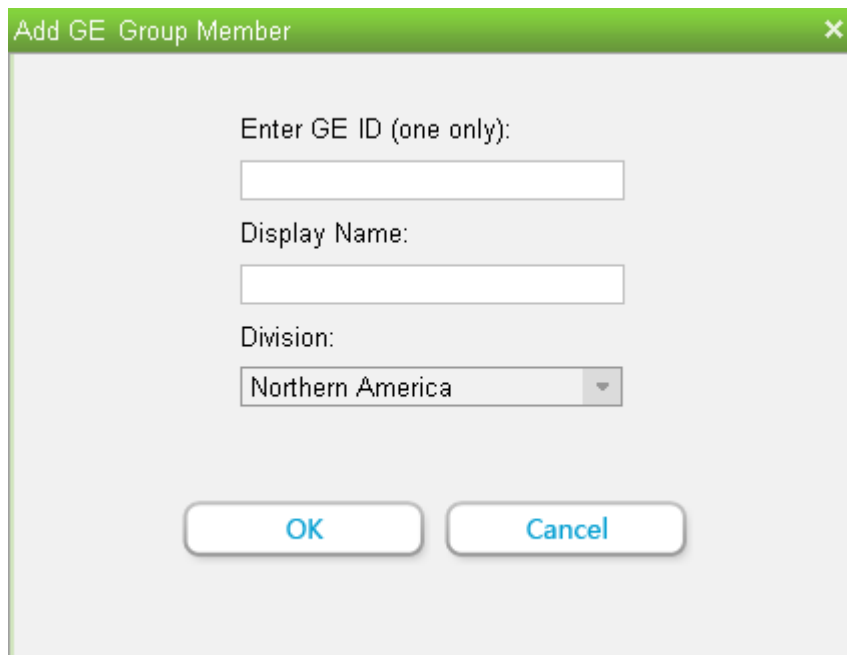
Delete Division

Select the division and click "Delete Division" button, then click "OK" in the dialog box.

3.9.2 Head Office Manages GE Group Members

Add GE Group Member

Click "Add Group Member" button  in the "Group Members" column. A dialog box will appear like this:



Add GE Group Member

Enter GE ID (one only):

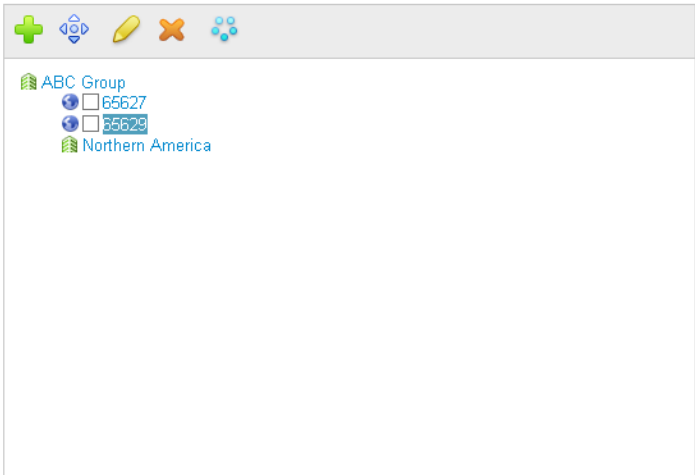
Display Name:

Division:

OK Cancel

Enter the GE ID you would like to invite and set its division, then click "OK". If the adding is successful, the interface will display as follows:

| | | | | | |
|------------------|-------------|-----------------|---------|-----------------|--------------|
| License | My GE | GE Group | Project | Machine Binding | Advanced |
| Hierarchy | Permissions | View Out | View In | Rule | Unjoined GEs |

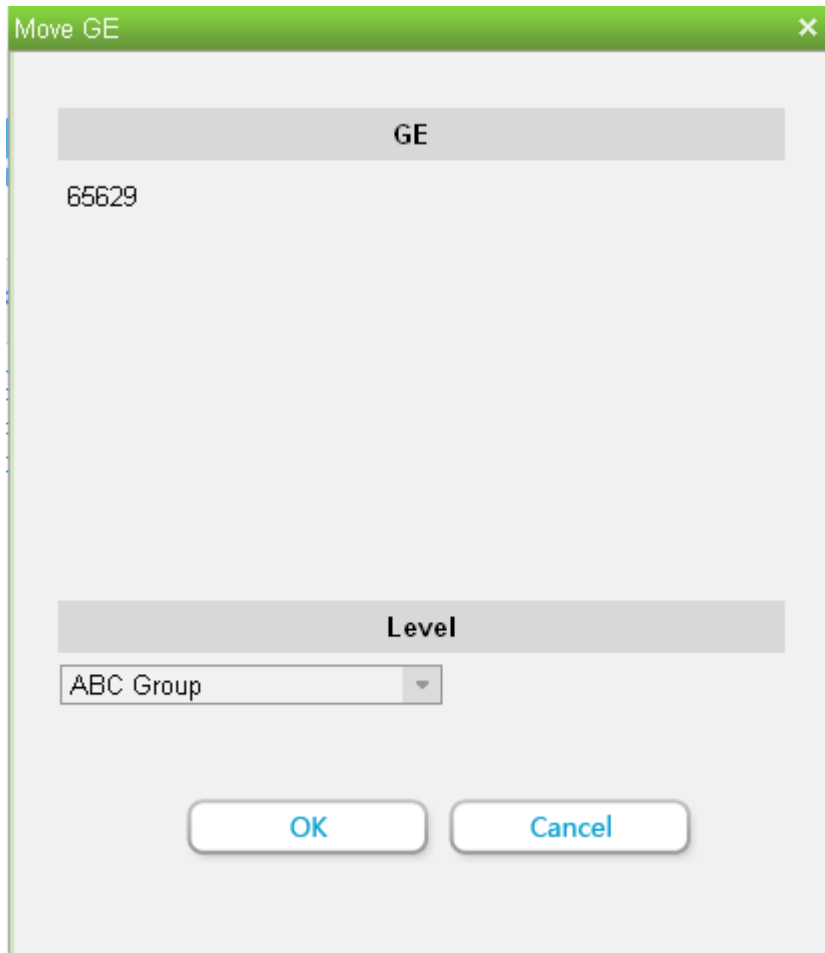


The screenshot shows a tree view under the 'GE Group' tab. The tree structure is as follows:

- ABC Group
 - 65627
 - 65629
 - Northern America

Move Group Member

Select the Group member and click "Move Group Member". A dialog box will appear as follows:



Select the division and click "OK"

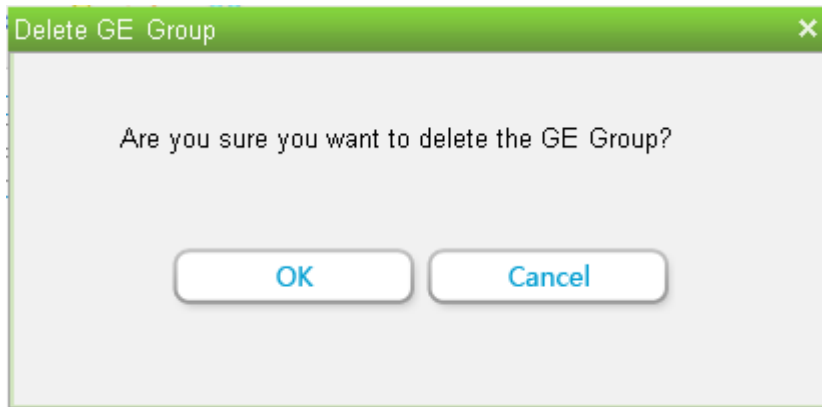
Notice: After the moved member accepts the Group invitation, the name will change to its GE name.

Delete Group Member

Select the Group member and click "Delete Group Member" button. Click "OK" in the dialog box to delete the GE from the Group.

3.9.3 Head Office Deletes GE Group

The head office clicks the "Delete GE Group" link and a dialog box will appear. Click "OK" to delete the GE Group. See below:



3.9.4 View Unverified GEs

Click the "View Unverified GEs" link on the top right of the GE Group page. A page will appear, listing those GEs which have not accepted or refused Group invitation. You can choose to re-send Group Invitation to those GEs. See below:

| License | My GE | GE Group | Project | Machine Binding | Advanced |
|-----------|-------------|----------|---------|-----------------|--------------|
| Hierarchy | Permissions | View Out | View In | Rule | Unjoined GEs |

The following list shows the GEs who have either not answered or declined their GE Group invitation. Select the GE (s) you would like to re-send invitations to.

The list does not include the GEs who have been removed from the GE Group Hierarchy.

| ID | Name | Status |
|-------------------------------------|------|--------|
| <input type="checkbox"/> 65629 | | Wait |
| <input type="checkbox"/> Select All | | |

3.9.7 Set GE Group View In/Out

See [Setup GE Group View In/Out](#)

3.9.8 Branch Setup

Group Invitation

Those companies invited to join a Group are branches; they will receive Group invitations which are to be accepted to join the Group and access the Group data set by the head office. Click the GE Group page

to receive invitations as follows:

You have 1 Pending Requests

1 ▾

Sender: 8051


GE ID: 65822


After joining a GE Group your GE member property settings will be reset. To set them again, go to GE Structure.



[Accept](#) [Refuse](#)


You may receive multiple invitations, but you can accept only one of them.; other Group invitations will be automatically refused.

After the invitation is accepted, the Group page will display the settings of the head office. See below:



 ABC Group

-  65629
-  65627

 Northern America

Setup GE Group View In/Out

You need to setup GE Group View In/Out after you join the Group. See [GE Group View Out](#) and [GE Group View In](#). After the setup, please select the roles in the organization structure. First, select the GE as follows:

| | | | |
|-------------|---------|-----------------|----------------|
| GE Group | Project | Machine Binding | Advanced |
| Permissions | Roles | Rule | Unjoined Users |

User Limit: 100 Users Added: 1(Users Joined)

Security Settings

Department Type:

Then select the department:

Name:ABC User Limit: 100 Users Added: 2(Users Joined:0)

| | |
|--|---|
| <div style="border-bottom: 1px solid #ccc; padding: 5px;"> + + + + </div> <ul style="list-style-type: none"> ABC <ul style="list-style-type: none"> Development Sales Sales - A | <div style="border-bottom: 1px solid #ccc; padding: 5px;"> <p>Security Settings</p> <p>Department Type: <input type="text" value="Select..."/></p> </div> <div style="border-bottom: 1px solid #ccc; padding: 5px;"> <p>Department Informaton</p> <p>Department Name: <input type="text" value="Sales"/></p> </div> |
|--|---|

Select the "View In" role and click "Save All Changes" on the top right of the page to finish the setting.

Notice: Any other company cannot view the GE unless the "View In" roles of the GE have been set. If the GE has set its "View In" roles, but not specified the "View In" roles in departments, all other Group members can view the GE's departments and roles.

3.9.9 Data Synchronzation

Click the "Upload to Server" button on the top right of GE management page to validate all changes to all companies in the Group.

4.0 Gateway