



# CHAPTER 12

## Performing Folder Attendant Administrative Tasks

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**Revised: October 10, 2008, OL-16995-01**

This section includes the following topics:

- [Folder Attendant Administrative Tasks, page 12-1](#)
- [Setting Up the Folder Attendant Service, page 12-2](#)
- [Setting Up Roles, page 12-4](#)
- [Setting Up Users, page 12-9](#)

### Folder Attendant Administrative Tasks

The Folder Attendant Administrative tasks include setting up the Folder Attendant service, defining users and roles, and setting permissions for users and roles.



**Note**

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You must have Admin Tools permission to perform these tasks.

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A user profile is created for each user who will have access to Folder Attendant. The user profile includes a user name and password, first and last name of the user, e-mail address for automatic notifications, and a User Role.

The User Role defines the level of access for each user.

The Administrative tasks that can be performed from Folder Attendant are:

- [Setting Up Roles](#)
- [Setting Up Users](#)

The Administrative tasks that can be performed from Windows are:

- [Starting the Folder Attendant Service](#)
- [Shutting Down the Folder Attendant Service](#)
- [Setting Up Folder Attendant to Start Automatically](#)

# Setting Up the Folder Attendant Service

This section includes the following topics:

- [Starting the Folder Attendant Service, page 12-2](#)
- [Shutting Down the Folder Attendant Service, page 12-2](#)
- [Setting Up Folder Attendant to Start Automatically, page 12-3](#)

## Starting the Folder Attendant Service

**Note**

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The following information is for the Folder Attendant Administrator only.

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Before you start using Folder Attendant, you must start the Folder Attendant Service:

**Procedure**

- 
- Step 1** From the Windows Start button, open the **Control Panel**.
- Step 2** Click **Administrative Tools**.
- Step 3** Click **Services**. A list of services running on the system displays.
- Step 4** Locate and select the **Folder Attendant Service** in the list.
- Step 5** If the value listed in the Status field does not display as Started, click the blue **Start** link on the left side of the page.
- or
- Right-click **Folder Attendant Service**, and select **Start**.
- The Status now displays as Started.
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## Shutting Down the Folder Attendant Service

**Note**

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The following information is for the Folder Attendant Administrator only.

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- 
- Step 1** From the Windows Start button, open the **Control Panel**.
- Step 2** Select **Administrative Tools**.
- Step 3** In the list, select **Folder Attendant Service**.
- Step 4** Click the blue **Stop** link on the left side of the page.
- or
- Right-click **Folder Attendant Service**, and select **Stop**.
-

## Setting Up Folder Attendant to Start Automatically

**Note**

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The following information is for the Folder Attendant Administrator only.

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Before using Folder Attendant for the first time, set the Folder Attendant program to start your system.

**Before You Begin**

Configure the Folder Attendant Service with a domain/system account that has the appropriate permissions for accessing watch folders and profiles. If the permissions are not set correctly, error messages indicating a problem with the permissions appear in the Folder Attendant Service log files located in: C:\program files\Cisco\MXE Folder Attendant Service\logs.

**Note**

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If a watch folder cannot be accessed, the Folder Attendant Administration page indicates that the status is Offline.

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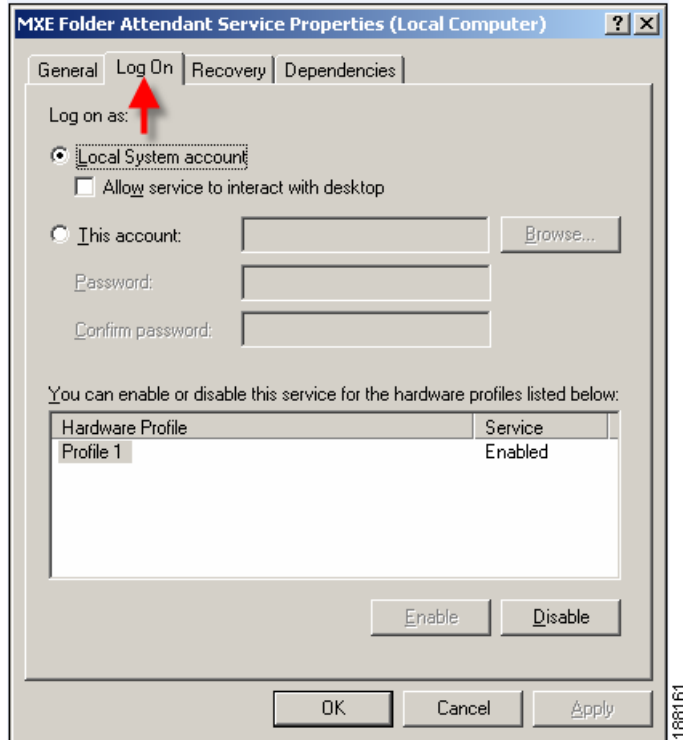
**Procedure**

- 
- Step 1** Start the Folder Attendant Service.
- Step 2** From Start > Control Panel > Administrative Tools > Services, verify that the value of the Startup Type field is Automatic, indicating that it will start automatically when the Cisco MXE 3000 is powered on. If it is not set to Automatic, right-click **Folder Attendant Service**, and select **Properties**.
- Step 3** Select the **General** tab, from the Startup type drop-down, select **Automatic**.  
The Startup Type now displays as Automatic, indicating that the Folder Attendant Services will start automatically when the PC/server is started.
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**Troubleshooting Tips**

If you see such error messages, go to the Log On tab from the Properties page, and add a special account (the same user account under which the Cisco MXE 3000 is running - usually a domain account with local admin permissions), as shown in [Figure 12-1](#).

**Figure 12-1** Log On Tab: Add Account with Appropriate Permissions



## Setting Up Roles

This section includes the following topics:

- [About the Role Administration Page, page 12-4](#)
- [Creating New Roles, page 12-5](#)
- [Updating Roles, page 12-6](#)
- [Permissions for Roles, page 12-6](#)
- [Setting Permissions, page 12-8](#)
- [Deleting Roles, page 12-8](#)

## About the Role Administration Page

Each Folder Attendant user is assigned a role that controls their level of access to the various system features.

Roles are defined on the [Role Administration](#) page, shown in [Figure 12-2](#).

Figure 12-2 Role Administration Page

The screenshot shows the 'Role Administration' page. At the top, there is a header 'Role Administration' and a menu bar with 'Create', 'Edit', and 'Delete' options. Below this is a table listing roles:

Role	Description
admin	Administrator
user	General user

Below the roles table is a section for 'Permissions for role: admin'. It contains a table with the following data:

Permission	Description	Default	Role	Allow
Admin Tools	Provides access to administrative tools	✗	✓	✓
Folder Attendant	Provides access to the Folder Attendant	✓		✓
Monitoring	Provides access to Monitoring functionality	✓		✓
Submission	Provides access to submission tools	✓		✓

At the bottom right of the screenshot, there is a vertical text label '188164'.

In the example in [Figure 12-2](#), during system deployment, two roles were defined: admin and user. From the Role Administration page, you can:

- Create New Roles
- Update Existing Roles
- Set Permissions for Roles
- Delete Roles

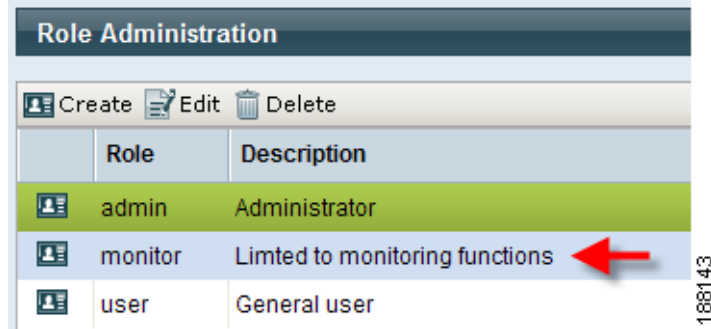
## Creating New Roles

The new role displays on the Role Administration page. The roles are sorted in alphabetical order.

### Procedure

- Step 1** Access the [Role Administration](#) page.
- Step 2** From the menu bar, select **Create**. The Create a New Role pop-up displays.
- Step 3** Enter a Role Name and Description, and click **Create Role**. The new role displays, as shown in [Figure 12-3](#).

Figure 12-3 New Role Has Been Added

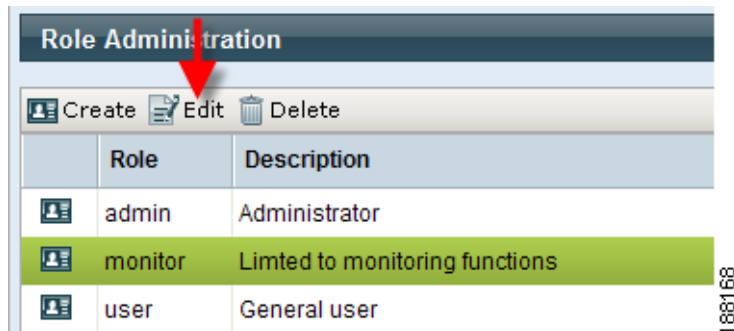


## Updating Roles

### Procedure

- Step 1** Access the [Role Administration](#) page.
- Step 2** Select the role you want to edit, as shown in [Figure 12-4](#).

Figure 12-4 Select Role to Edit



- Step 3** Select **Edit** from the menu bar. The Edit Role pop-up displays.
- Step 4** Update the information in each of the fields, as needed. The fields marked with an asterisk (\*) are required.
- Step 5** Select **Edit Role** to save the new information.

## Permissions for Roles

After creating a role, the System Administrator sets permissions for that role.

Each role is allowed or denied permission to use the following Folder Attendant features:

- Admin Tools
- Folder Attendant

- Monitoring
- Submission

The permissions for a selected role display in the lower pane, as shown in [Figure 12-5](#).

**Figure 12-5** Permissions for the Selected Role

The screenshot shows the 'Role Administration' window. At the top, there are buttons for 'Create', 'Edit', and 'Delete'. Below this is a table with two columns: 'Role' and 'Description'. The 'user' role is selected and highlighted in green. Below the role list, there are buttons for 'Allow', 'Deny', 'Remove', and 'Remove All'. A red arrow points to the text 'Permissions for role: user'. Below this is a table with five columns: 'Permission', 'Description', 'Default', 'Role', and 'Allow'.

Permission	Description	Default	Role	Allow
Admin Tools	Provides access to administrative tools	✘		✘
Folder Attendant	Provides access to the Folder Attendant	✔		✔
Monitoring	Provides access to Monitoring functionality	✔		✔
Submission	Provides access to submission tools	✔		✔

[Table 12-1](#) describes the columns that display the permissions for each role.

**Table 12-1** Selected Permissions

Column	Description
Default	Shows the default permissions that are shipped with Folder Attendant.
Role	Shows the permissions set for the Role. Permissions set for the role override the Default permissions.
Allow	The actual permissions set for the selected role, often the same as the Role column.

The red X indicates that permission for that feature is denied, and the green check mark indicates that the user in this role has permission to access the feature.

Read the permission table from left to right: marks in the column to the right override the previous column.

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In the example in [Figure 12-5](#), the monitor role came loaded (by default) with access to Folder Attendant, Monitoring, and Submission features. In this case, an administrator has removed, for the role called Monitor, access to Folder Attendant and Submission features. The Monitor role now allows access to Monitoring functions only.

Modify the permissions for the selected role. See also: [Setting Permissions](#).

For each feature, you can specify whether or not to allow, deny, or remove access. You can also choose to remove all access to all features for a specific role.

## Setting Permissions

### Procedure

- 
- Step 1** Access the [Role Administration](#) page.
- Step 2** Select the role for which you want to set user permissions. The permissions for the selected user are listed at the bottom of the page.
- Step 3** Select the permission you want to modify. Your choices are the following:
- Admin Tools
  - Folder Attendant
  - Monitoring
  - Submission
- Step 4** Select one of the buttons shown in [Table 12-2](#) for each role.

**Table 12-2** *Permissions Settings*

Name	Description
Allow	Allow users in this role access to the specific feature.
Deny	Deny users in this role access to the specific feature.
Remove	Remove users in this role access to the specific feature.
Remove All	Removes all access to all features for the specific role.

- Step 5** Repeat [Step 3](#) and [Step 4](#) for each feature to set all permissions for this role.
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## Deleting Roles

### Before You Begin

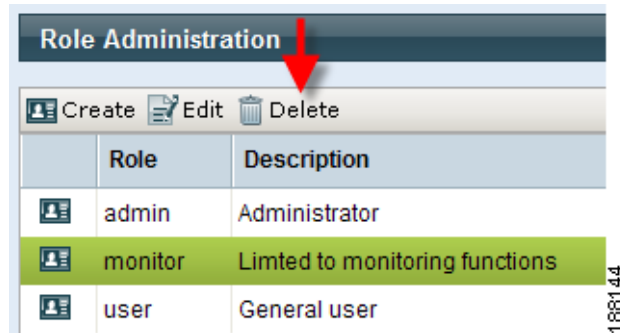
You can only delete a role if it contains no users. If the role contains users and you try to delete it, an error message displays at the top of the page.

### Procedure

- 
- Step 1** Access the [Role Administration](#) page.

**Step 2** Select the role that you want to delete, as shown in [Figure 12-6](#).

**Figure 12-6** Select the Role to Delete



**Step 3** Click **Delete**. A confirmation message displays.

**Step 4** Select **OK** to continue with the deletion.

The role is removed from the list of roles on the Role Administration page.

## Setting Up Users

This section includes the following topics:

- [Creating New Users, page 12-9](#)
- [Updating Existing Users, page 12-10](#)
- [Permissions for Users, page 12-10](#)
- [Setting Permissions, page 12-12](#)
- [Deleting Users, page 12-13](#)

## Creating New Users

Each person using Folder Attendant needs a user profile that controls system access.

### Procedure

**Step 1** Access the [User Administration](#) page.

**Step 2** From the menu bar, select **Create**. The Create User pop-up displays.

**Step 3** Enter the appropriate information in each of the fields described in [Table 12-3](#). All fields are required.

**Table 12-3** Create New User Fields

Field	Description
User Name	Enter a name for the new user.
Password	Enter a password for the new user.

**Table 12-3** Create New User Fields (continued)

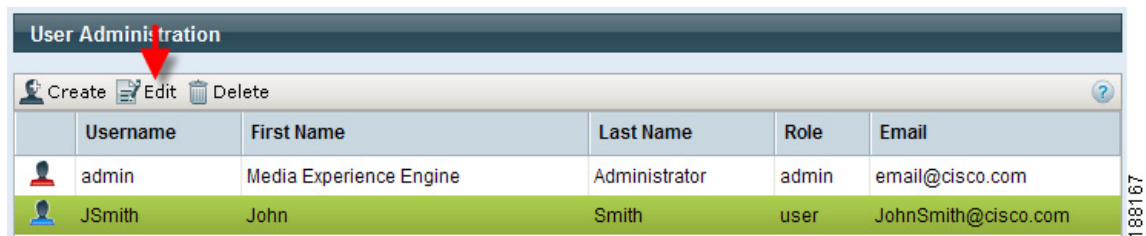
Confirm Password	Re-enter the password to confirm it.
First Name	Enter the first name of the user.
Last Name	Enter the last name of the user.
E-mail	Enter the e-mail address of the user.
Role	Select the role from the drop-down menu. The role defines the level of access the user has to Folder Attendant functions. Roles are defined at the time of deployment and are normally: Administrator and User.

- Step 4** Select **Create User** to save the new user. A message displays indicating the new users has been successfully added.
- Step 5** Select **Continue**. The new user displays on the User Administration page. The users are sorted in alphabetical order.

## Updating Existing Users

### Procedure

- Step 1** Access the [User Administration](#) page.
- Step 2** Select the user you want to edit, as shown in [Figure 12-7](#).

**Figure 12-7** Select the User to be Edited

- Step 3** Select **Edit** from the menu bar. The Edit User pop-up displays.
- Step 4** Update the information in any fields, as needed. The fields marked with an asterisk (\*) are required.
- Step 5** Click **Edit User**. The new information is saved, and the User Administration page is updated.

## Permissions for Users

After [creating a user](#), the System Administrator needs to set permissions for that user. Each user is allowed or denied permission to use the following Folder Attendant features:

- Admin Tools

- Folder Attendant
- Monitoring
- Submission

The permissions for a selected user are displayed at the bottom of the User Administration, as shown in Figure 12-8.

**Figure 12-8** Permissions for the Selected User

The screenshot shows the 'User Administration' interface. At the top, there are buttons for 'Create', 'Edit', and 'Delete'. Below this is a table of users with columns: Username, First Name, Last Name, Role, and Email. The user 'JSmith' is selected and highlighted in green. Below the user list, there are buttons for 'Allow', 'Deny', 'Remove', and 'Remove All'. A red arrow points to the 'Permissions for user: JSmith' header. Below this header is a table with columns: Permission, Description, Default, Role, User, and Allow.

Permission	Description	Default	Role	User	Allow
Admin Tools	Provides access to administrative tools	✘			✘
Folder Attendant	Provides access to the Folder Attendant	✔			✔
Monitoring	Provides access to Monitoring functionality	✔			✔
Submission	Provides access to submission tools	✔			✔

Table 12-4 describes the four columns that display the permissions for a user.

**Table 12-4** Columns in the Permissions Table

Column	Description
Default	Shows the default value for the permissions that are shipped with Folder Attendant
Role	Shows the permissions set for the Role. Permissions set for the Role override the Default permissions. The Role permissions specified in this column are set from the Role Administration page.
User	Shows the permissions set for the selected user. Permission set for the User override the Role permissions.
Allow	The actual permissions set for the selected User.

The red X indicates that permissions for that feature are denied, and the green check mark indicates that the selected user has permissions to access the feature.

Read the permission table from left to right: marks in the column to the right override the previous column.

The Default permissions are shown in the first column. These are default permissions that come loaded in the system.

The Role column shows the permissions for the Role assigned to this user. The permissions for the Role override the default permissions and are set on the Role Administration page.

The User permissions show the permissions for this specific user. These permissions override both the Default and Role permissions for this user only. Modify the permissions for the selected user shown in this column by following the procedure described below.

To quickly determine if certain permissions are allowed for a user, view the Allow column.

Figure 12-8 is an example of permissions set for the user named JSmith who has been assigned the user role. Notice that by default, those in the user role do not have access to Admin Tools (in this case) but have access to the remaining features. However, an administrator has added (overridden) the Admin Tools permission to this User's role.

For each feature, you can specify whether or not to allow, deny, or remove the user's access. You can also choose to remove all access to all features for a specific user.

## Setting Permissions

### Procedure

- 
- Step 1** Access the [User Administration](#) page.
- Step 2** Select the User for which you want to set permissions. The permissions for the selected User are listed at the bottom of the page.
- Step 3** Select the type of permission you want to modify. Your choices are:
- Admin Tools
  - Folder Attendant
  - Monitoring
  - Submission
- Step 4** Select one of the buttons described in [Table 12-5](#) for the selected permission.

**Table 12-5** *Permissions Settings*

Name	Description
Allow	Allow the user access to the specific feature.
Deny	Deny the user access to the specific feature.
Remove	Remove the user access to the specific feature.
Remove All	Removes all access to all features for the specific user.

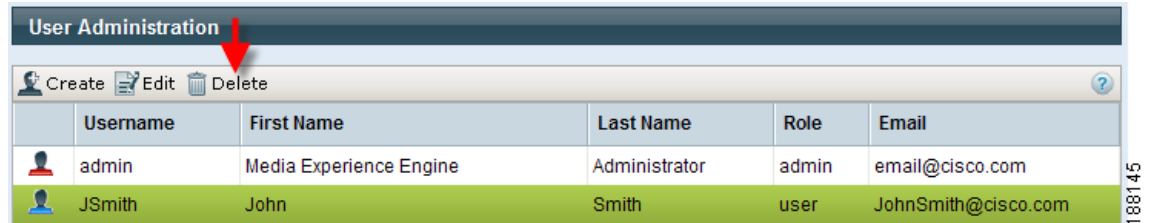
- Step 5** Repeat [Step 3](#) and [Step 4](#) for each feature to set all permissions for this user.
-

## Deleting Users

### Procedure

- Step 1** Access the [User Administration](#) page.
- Step 2** Select the user you want to delete, and click **Delete**, as shown in [Figure 12-9](#).

**Figure 12-9** Select User to Delete



- Step 3** When the confirmation message displays, select **OK** to continue with the deletion.

