

## Who is the community manager?


The community manager is any user who is member of the Community Managers' group. This group is generated automatically at community creation and is the owner of all community's resources. This means, its members are the only ones authorized to view and change the community settings and to create new rooms, users and groups.

The role of the community manager is thus configuring the community to the desired form: define the defaults / the rules of the community (like notification settings, data leakage preventions rules, condition of use), create users and groups and assign them access to newly created rooms.

For big communities, the powers of the community managers group can be delegated: we may have communities with someone responsible for the users/groups administration, someone other for setting up the different rooms and another one for configuring the community settings.

We always recommend to assign such permissions not to single users but to a group: this will simplify the handling for example in case of staff turnover.

In any case it is always a good idea to have more than one community manager: in case you don't have "physically" another person, you may create a "virtual backup account", which credentials are kept in a safe place for emergency cases.

To access the administrative area, click in the top bar on the Administration icon () and select the function you are interested in.

## Community emergency code

What can you do when you forget your credentials? You can contact your community manager asking him to send you a new password. And in case he is not available or even worse, in case YOU are the ONLY community manager? It's not possible to contact Caveau hotline in order to reset your password: since all the data inside your community is encrypted using a key available only to community members, externals (included the system administrators) cannot view or edit any data inside the community and therefore not even the passwords.

To help you in such situation there is the "Community emergency code". This code (a pretty long random sequence of letters and numbers) has to be generated by the community manager and kept the relative PDF sheet in a safe place.

When you (or another user) can't access the community and no one is able to help, you can go to the address <https://app.digitalcaveau.com/#/cec> and enter your name, your community and, instead of your password, the community emergency code.

At this point, you would not gain directly access to the community (which could be a security breach). Instead you will simply receive (through the standard communication ways: SMS or email) a new password that you can use to enter the community.

In case of use of the Community emergency code, the community managers are going to be alerted. A community emergency code can be reused multiple times.

To generate a new Community emergency code, click in the top bar on the Administration icon and select "Community settings", then select "Generate community emergency code" from the "... Actions" button.

Seen its importance we recommend to do it immediately as soon you enter your new community.

## Manage the community settings

To manage the settings of your community, click in the top bar on the Administration icon and select "Community settings".

### Basic settings

If you click on "Edit" you can change following settings:

- **Displayed name** The name displayed on the top of the screen once logged in (not to be confused with the community name to be entered at login).
- **Default language** The default language to be set by the creation of new users.
- **Allowed notifications** The notifications channels (email/SMS) to be allowed inside your community.
- **One-time guests** Whether you want to allow the creation of one-time guests
- **Allow guest creation** Whether you want to give the possibility to your members to create guest access on single resources, where they are owner. You can also assign this permission to single users.
- **Allow homonyms in users' names** Whether to allow the creation of users with the same last name / first name combination.
- **Disable inactive users** Whether to disable inactive users after a certain amount of days after their last login.
- **Default authentication method** The default authentication method for new users.
- **Session timeout** The max. time between each request to the system before the session get invalidated.
- **Password settings** You can define here the password settings like:
  - Min. length
  - Min. Quality
  - Force periodical password change
  - Prevent re-use of previously used passwords
  - Max. wrong login attempts before blocking the account
- **Lost credentials key** If you want an automatic support in case of lost credentials please paste here the current community emergency code.
- **Geofencing support** You can activate this flag if you would like to limit the access to your community for some user to specific places. Possible options are:
  - Geo IP: you will be able to define for each user from which country they can login
  - IP filter: you will be able to define for each user from which IP range (for example your company public IP) they can login
- **Enable Google maps** Enabling this feature allows you to see on a map the address of your community users as well as the location of your events/meetings.

- **Mask mobile numbers** Enable this flag if you don't want that the users can see each other mobile numbers.
- **List items per page** With this option you can define how many items are going to be displayed on one page.
- **Trash bin** With this flag enabled, if you delete a resource (room, file, event, ...), it is first moved to the trash bin and later you have eventually the possibility to restore or permanently delete it.
- **Automatically empty trash bin** You can define to empty the trash bin automatically after a certain number of days are passed from the resource's deletion date.

## Notifications settings

To set the default notifications settings for your users, select "Set notifications" from the "... Actions" button in the "Community settings" page. Here you can define how users have to be notified in case of normal and high priority notifications (the priority is chosen by the owner of the relative resource) as well as for chat notifications. The available media (email or SMS) depend on the selection you have done in the basic settings of your community. These settings can be overwritten for each user.

## Customize logo

If you would like to replace the Caveau logo on the top of the page with your own logo, you can simply upload it using the "Change logo" button on the "Community settings" page. The available place for the logo is wide 220 px and high 80 px. Biggest images are scaled.

## Data leakage prevention

You can define your community's data leakage prevention (DLP) rules for the files uploaded by your members resp. by your guests. You can specify:

- Max. file size
- Allowed file formats
- Prohibited file formats
- Prohibited keywords inside the files

## Conditions of use

You can define that the users have first to accept your conditions of use of the platform before being able to access it.

## Permissions

Not sure about the permissions defined inside the community? To help you cross-check them you can export the community permissions (always from the "... Actions" button on the "Community settings" page). You will get a spreadsheet with all your resources and the permissions owned on it by each user:

		Manager	Board Member	Ceo	Community Manager	Department2	Secretary	Department
<b>Demo Community</b>	Communities				Owner			
<b>Rooms</b>	Rooms root	Viewer	Viewer	Viewer	Owner	Viewer	Viewer	Viewer
click permissions	Generic rooms		Viewer		Owner		Contributor	
subroom 1	Generic rooms				Owner		Contributor	
Penguins.jpg	Files			Viewer	Owner		Contributor	
Carvau-release_notes_2018-04_IT.pdf	Files		Viewer		Owner			
test			Viewer		Owner		Contributor	
Departments	Generic rooms	Owner			Owner	Contributor		Contributor
Emplojes 1	Generic rooms	Owner			Owner	Contributor		Contributor
Etihad.pdf	Files	Owner			Owner	Contributor		Contributor
Laptop		Contributor			Owner			Contributor
May-the-sun-bring-you-new-energy-by-day-	Files				Owner	Viewer		Viewer
Documents	Generic rooms	Viewer	Viewer	Viewer	Owner	Viewer	Viewer	Viewer
Analysis	Generic rooms	Viewer	Viewer	Viewer	Owner	Viewer	Viewer	Viewer
Contracts	Generic rooms	Viewer	Viewer	Viewer	Owner	Viewer	Viewer	Viewer
I need my account statements	File requests			Contributor	Owner			
Ospiti	Generic rooms			Viewer	Owner			
Demo Cala.org				Viewer	Owner			
Demo				Viewer	Owner			
Demande				Viewer	Owner			
Online editing				Viewer	Owner			
Presentazione della piattaforma				Viewer	Owner			
AGORA-Secure Collaboration.pdf	Files			Viewer	Owner			
Carvau - Getting Started Guide.pdf	Files			Viewer	Owner			
Personal calendars	Generic rooms			Viewer	Owner			
Personal trainer!	Events			Viewer	Owner			
<b>Members</b>	Users			Viewer	Owner	Viewer	Viewer	Viewer
Board Member	Members	Viewer	Viewer	Viewer	Owner	Viewer	Viewer	Viewer
Ceo	Members	Viewer	Viewer	Viewer	Owner	Viewer	Viewer	Viewer
Community Manager	Members	Viewer	Viewer	Viewer	Owner	Viewer	Viewer	Viewer
Community Manager	User rooms	Viewer	Viewer	Viewer	Owner	Viewer	Viewer	Viewer
Department1	Members	Viewer			Owner	Viewer		Viewer
Department2	Members	Viewer			Owner	Viewer		Viewer
Manager	Members	Viewer			Owner	Viewer		Viewer
Secretary	Members		Viewer	Viewer	Owner		Viewer	Viewer
<b>Groups</b>	Groups	Viewer	Viewer	Viewer	Owner	Viewer	Viewer	Viewer
Board 2	Members groups	Viewer	Viewer	Viewer	Owner	Viewer	Viewer	Viewer
Board members	Members groups	Viewer	Viewer	Viewer	Owner			Viewer
Board members	Group rooms		Owner	Owner	Owner		Contributor	

## Wipe community

If you are looking for a quick way to delete all the content of your community, the "Wipe Community" is your function. You can find it in the "... Actions" button on the "Community settings" page.

This function permanently deletes EVERYTHING (except your account and the Community managers group) from your community, so as you can image, as to be used very carefully. It can be used for example in case you use your community over the time for different projects (like mergers and acquisitions) each time with a different audience.

## Users

To create and manage users, click in the top bar on the Administration icon and select "Users".

### Members vs Guests

We have two types of users inside Caveau: members and guests.

The first ones are what we may also define as "power users"; they are typically your company employees. A member can potentially do everything inside the platform: create resources, setting permissions, create guest accesses and perform administrative tasks (like users and groups management). In order to simplify your job, inside Caveau you can also assign on the different resources a "default" permission to "every member of the community".

On the other hand, guests are typically external users, like customers or partners. If given the necessary permission a guest can access all the resources but only upload new documents, create requests, participate in chat and discussions and create new rooms. All this in a very controlled way: they are not able to modify the inherited permissions, notifications and approvals settings. In addition, since the "default" permission to "every member of the community" do not apply for guests, in order to access a resource, you will have to explicit assign him a permission to access something. In this way you don't have the risk that a guest can unintentionally see something he should not have been allowed to.

### Create new users

To create a new user simply click on New and select the type of user (member or guest) that you would like to create. In the wizard you will have the possibility to define, beside the user data, also his groups' memberships, whether to create for him a personal room, whether to send him directly the login information and finally who is going to see and manage this user.

### Send login information

If one or your users forget his credentials you can send him a new password by entering his profile page and selecting "Send login information" from the "... Actions" button.

You can send either all credentials (username, community, address of the application plus a new password), only a new password or only the rest (without generating a new password).

### Disable a user

If you want to suspend the access of a user, without deleting his account, you can simply enter his profile and select on "Disable" from the "... Actions" button.

To re-enable him simply select "Enable" from the same button.

## Groups

To create and manage groups, click in the top bar on the Administration icon and select "Groups". In Caveau you can use groups to simplify your job: instead of assigning permissions to single users you assign them to groups. This is very useful for example in case of turnover.

### Create new groups

To create a new group simply select "New" on the Groups page, select the type of members you would like to have in this group (members or guests), provide a name and an optional description and finally select its members.

## Rooms

A room is the basic collaboration element of Caveau: it is the place that you set up to start collaborating with someone. It acts like a classical file folder but offers much more capabilities: in fact, you can store there not only files, but also sub-rooms (to better organize your data), events, discussions and much more. On a room, you define the general rules for the collaboration: who can participate and with which permissions, the default notification settings, whether the files have to be first approved, whether there is a maximum life-time for the document stored there, etc.

### Create new rooms

To create a new room, go to a room, where you own at least a "Contributor" permission and click on the "New" button on the top right-hand corner a select "Room" from the drop-down menu. You can either enter simply the new room's name and confirm with "OK" or, similar to the file, define additional information. The settings you define on the room will then be the default ones applied on the resources (files, sub-rooms, ...) saved inside this room.

Create room ✕

Destination Choose destination

Room Create a new room



Path Rooms / Documents /

\* Room name

Description

Approvals Disabled

Send notifications Disabled

Shared with  

[Preview Permissions Overview](#)

Advanced settings

\* Required field

## Grant guest access to a resource

If allowed by your community, you can grant guest access to a resource (on which you own Owner permission). To do it, simply click on the "Grant guest access" button and, inside the form, enter:

- The email address of the guest
- The permission you want to grant him/her
- The duration of his/her access
- If you want that the guest will be able to access that resource only once or multiple times

The screenshot shows a dialog box titled "Q2 Balance.xlsx - Grant guest access". It contains the following fields and options:

- \* Email:** A text input field containing the placeholder text "Email".
- Authentication:** A dropdown menu set to "Password only".
- Mobile:** A text input field containing the placeholder text "Mobile".
- Permission:** Four radio button options: "Previewer" (selected), "PDF Viewer", "Viewer", and "Contributor".
- Access period:** A row of buttons for "12 hours", "1 day", "1 week", "1 month", and "Custom...".
- Only one time:** A checkbox that is currently unchecked.

Below the form, there is a note: "\* Required field". At the bottom of the dialog, a blue information bar states: "Guest can View in browser file 'Q2 Balance.xlsx' from 9/18/2017 08:19 until 9/19/2017 08:19". At the bottom right, there are "Ok" and "Cancel" buttons.

If you grant a guest access on a room you can also decide if you want to grant this access only on that room (and, per default, on the, from now on, new created elements inside it) or also on the existing sub-elements.



## Permissions







On each resource you can define who and with which permission can have access to it. It is possible to define a general permission valid for all community's members (not guests!) and assign permissions to single groups and users.

Board meeting - Permissions Settings ×

Custom permissions  
Personalize the permissions

Common permissions  
Choose between common permissions patterns

Here you can define the permissions on this resource, who can see and change it

Users / Groups ^	Permissions	Inheritance ⓘ
 Board members	<span style="color: green;">●</span> Viewer ▾	 Apply ▾ <span style="float: right;">×</span>
 Community Managers	<span style="color: blue;">●</span> Owner ▾	 Lock ▾ <span style="float: right;">×</span>
 Secretary	<span style="color: blue;">●</span> Contributor ▾	 Apply ▾ <span style="float: right;">×</span>

**Add users/groups** Show all ☐

Type the name of the user/group

Viewer ▾

Caption: No access Previewer PDF-Viewer Viewer Contributor Owner

[Preview Permissions Overview](#)

OK Cancel

When a user tries to access a resource, the system will first check if for that user a permission on this resource was assigned and in case this one will be applied. Otherwise the system will check if a permission was assigned to one of the groups in which that user is member of. If any is found the greater permission will be applied. If nothing was found, in case the user is a community's member, the system will check if a general permission for all community's members exists: if found this last will be applied otherwise the user has no access to this resource.

## Permissions levels

The available permissions levels are:

Role	What you can do
<b>Previewer</b>	See all resources on the screen + display the content of files on the screen (with a watermark)
<b>PDF viewer</b>	Same as above + download a PDF copy of the original files (with a watermark)
<b>Viewer</b>	Same as above + download the original files
<b>Contributor</b>	Same as above + add content to the current resource (in case of a room: upload files, create sub-rooms, events, ...; in case of a file: upload new versions; ...)
<b>Owner</b>	Same as above + modify the settings and the permissions and delete the resource

You can also assign to a user the special permission “No access”. Since “No access” is the default permission, this level is only to be used for defining an “exception” to another permission defined (for example the file should be visible by all the group Marketing members BUT NOT by one of them).

## Permissions' inheritance

On the "Permissions settings" form for "container" resources (resources where you can store other sub-elements, like rooms and events) you can also optionally define the inheritance behavior of the defined permissions. In other words, you can define how this permission should be propagated to the new elements saved inside the current resource. The available options are:

- **Apply** (default option): this permission will be proposed by the creation of new elements, but the author will be able to change or remove it
- **Lock**: this permission will be applied also on the new elements and the author will not be able to change or remove it
- **Don't apply**: this permission won't be proposed by the creation of new elements. The author can however add it manually

## Reporting

As a community manager you can see several kinds of reports about the use of your community:

- Daily logins (the daily number of accesses in to your community)
- Login frequency (the frequency with which your users use the platform: Here you may see that someone is using it daily whereas others have never had access).
- Activities (the different activities done in your community).  
You can export this list into a PDF or Excel file.
- Users activities (same as before, but the data is first grouped by user).  
Even this data can be exported into a PDF or Excel file.