

SYSTEM ADMINISTRATION

Schema Setup;

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User Manual - Schemas Setup

General Setup for Schemas

In Signify, Schemas are used to keep an organisation together in one unit. If your company has is a holding company and owns several other companies, management may want to retain the branding and culture of the companies within the group. If the companies have different values, different branding and different HR managers, consider using a schema to easily manage communication from the LMS. The purpose of this article is to elaborate on the steps required to create a new schema.

Requirements and Setup

Schema creation results in major system changed. The following precautions can assist in reducing any risk when creating a new schema:

- Before you begin, **request a backup** to be made by sending an email to support@signify.co.za. Your responsible BA will be assigned on the Request and you will have someone from our team on standby should anything unexpected happen.
- Create the new Schema **on UAT** first. Complete the steps listed in these articles and make 100% sure that what you expect to see and do on the new schema is in line with your expectations.
- When creating the schema on LIVE, make sure to **do it after hours**. In line with the Backup request, Support can take the system offline for you to complete the configuration.

Navigate to System Administration | Users | Manage Users

A user must have specific rights to create a schema. On the List of Users page, complete the following steps to assign the appropriate access.

- Search for and select the user
- In the User Details section, check the Schema Administrator Option
- Click the Submit button at the bottom of the page

The user will now be able to create a new schema.

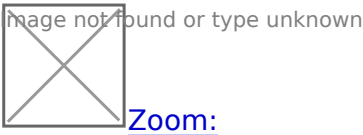
image not found or type unknown



Create New Schema

Navigate to System Administration | Tools | Configuration | Schema Management

To create a new schema, click on the Add button. The Schema Management Details page will be displayed.

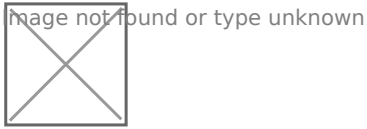


Below is a list of all the fields available on this screen and a description of the intention of each field.

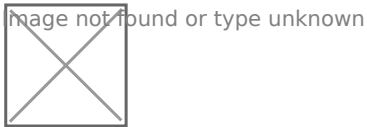
| Field Name | Description |
|--|---|
| Schema Description | This will be then Schema name. For example Signify Software |
| Schema Prefix | This is a shortened version of the Schema name. For example SS |
| Item Order | This is the order of the Schema in the list. For example 4 |
| Copy From Schema | Select the Schema you want to copy from |
| Schema SQL Criteria | More information regarding this field will be supplied as soon as possible. |
| Show On Portal | Checkbox is must be checked. |
| Always show on Primary Interface | Checkbox is must be checked. |
| Only Show to Current Division | Checkbox is must be checked. |
| Show "All Learning Programmes" link on interface | Checkbox is must be checked. |
| Show Learning Guides on Interface | Checkbox is must remain unchecked. |
| Show Advertised Events on Interface | Checkbox is must be checked. |
| Image URL for Schema Logo | Leave Blank. |
| Culture | Leave Blank. |
| Fiscal Year Start Month | This is the month the fiscal/financial year of the organisation starts on. |

Switch to New Schema

System Administration Portal | Home (Icon) - Hover Only | Switch Schema

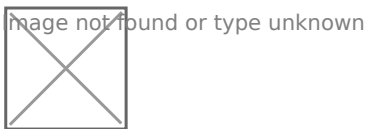


After creation the new schema, you must switch to the schema which was created to configure the schema. Click on Switch Schema to open the Schema Access Page.



- Select the new Schema you created from the Switch To Drop Down.
- Click the Switch Schema button.

The Administration Portal will open and you will see the Schema you have switched to in the bottom left corner of the screen.



Define New Schema Administrator

Navigate to System Administration | Users | Mange Users

5.1. Assign Schema Administrator Rights

The first action to complete on the new Schema is to assign Schema administration access.

- Search for and select the user who will be the Administator of the new schema.
- On the User Information page, in the User Details section, check the Schema Administrator Checkbox.
- Click the Submit button at the bottom of the page.



Image not found or type unknown

Assign User Rights

From the left hand menu, select the Role Assignment Section to Assign the System Access Administrator Role to the new Schema Administrator.

Activate Modules

System Administration | Tools | Configuration | Framework | Modules | Set Active Value of Respective Modules

Create New Theme

System Administration | Tools | Configuration | Framework | Theme Management

Theme Key Management

System Administration | Tools | Configuration | Framework | Theme Key Management

New URL

Configure Basic Learning Store Login Page

Configure Emails



Quick Reference Guides and Practical Exercises

COMING SOON....

COMING SOON



Audit Recovery Tool

Front End Access to Tool:

System Administration | Tools | Configuration | Framework | Restore Audit Data

Keep in mind before using the tool:

- As of Version 1 of the Audit Recovery Tool, it does not restore *related* table data. It will only restore the data from the table you are currently selecting from. In other words, please restore the data for each table in the correct required order.
- The restore audit functionality is schema specific. You need to be logged in with the correct schema to see that schema's data.
- When the Audit Table Dropdown is set to *AudAuditLogs*, the Field Dropdown will be set to 'All' and the Operator to 'Contains'.
- The Deleted By textbox refers to the Username of the user who deleted the record.
- When Using the IN Operator in the Operator Dropdown, separate values by comma. For Example: 1,2,3.

For SysAudit Table Restores:

- When the Audit Table Dropdown is set to one of the *SysAudit* tables, the Field, Value and Operator dropdowns are based on the old value field in sysAudit.
- The SysAudit Field Dropdown and SysAudit Value Textbox are optional filters that become available if one of the SysAudit tables are selected.
- When filtering on specific columns for a SysAudit record (Field & Value Criteria), it will only bring back one column. This is fine. The script will restore all the related columns as well.

Criteria Available to find Audit Data:

- Table
 - List of tables that you can use to look for Audit Data.
- Audit Table
 - List of audit tables that contains data for the table selected previously.
- Deleted By
 - Refers to the Username of the person that deleted the record(s)
- Deleted Between

- Refers to the date(s) the data was deleted before/after/between
- Field
 - Filter on the columns from the *Table* selection
- Operator
 - Filter Options for Value of the Field.
 - Options Available: Equals, Contains, In, Greater Than, Less Than
- Value
 - Filter value for the *Field* selection
- SysAudit Field
 - Enables once one of the sysAudit tables are selected as the audit table criteria
 - Allows you to filter on the sysAudit columns directly because IDs are not always saved in sysAudit record
- SysAudit Value
 - Enables once one of the sysAudit tables are selected as the audit table criteria
 - Allows you to filter on the sysAudit column value (Selected above) directly because IDs are not always saved in sysAudit record

How to restore data for clients that do not have the Audit Restore Functionality yet:

1. Utilize your local to access the front-end of the sysAudit Functionality. Add the filter criteria as you would enter it on the client site.
2. Open SQL Profiler and get the EXEC created for sysRestoreAuditData script.
3. Make sure you run all the below scripts on the client and that they run successfully:
 - B_00266_99999_fncSplit_NthItem.sql
 - C_02229_99999_sysSelectAuditTablesByTableName.sql
 - C_02237_99999_sysSelectAllTableColumns.sql
 - C_02238_99999_sysRestoreAuditData.sql
 - C_02258_99999_sysSelectAllForeignKeyReferencesByTableName.sql
 - C_02317_99999_sysSelectAllNonAuditTables.sql
4. Utilize the EXEC (Step 2) to generate the selection of the records that will be restored. You can set the @Debug parameter to 1 if you'd like to get the select statement.
5. Once you have confirmed that you are happy with the data displayed from the select, set @IsRestore equals to 1 and run the exec.
6. Fix any issues if occurs (Mostly it will be FK Constraint issues from other tables that might not have the needed data anymore)

Videos

<https://www.youtube.com/embed/HXDdPGq4IoA>

https://www.youtube.com/embed/YLWEcjAg4_I

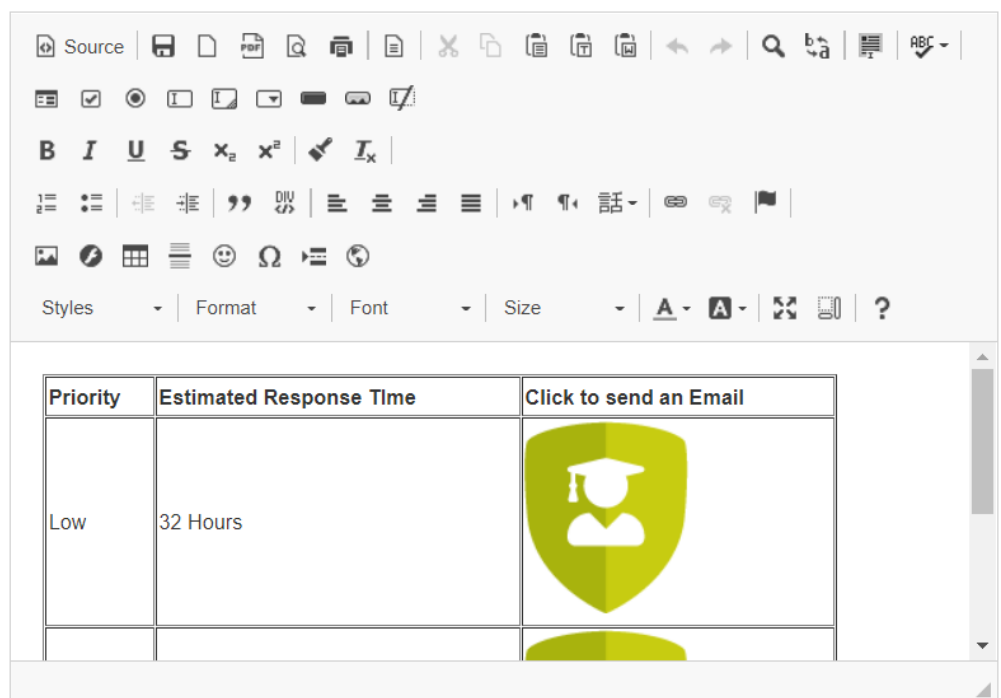
Support Button Set Up Using Image Links (Support Message)


If a client uses an image with a link to launch an external mail launcher, they most probably will experience an issue where the main page loading indicator does not stop loading.

The below fix should be applied to the customer's front end.

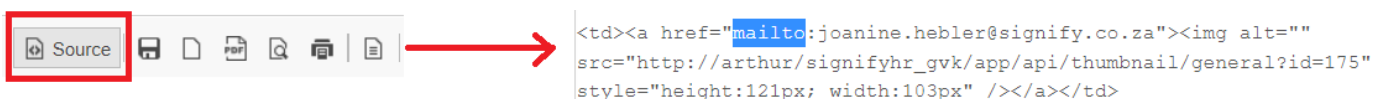
Navigate to where the support button setup happens: **System Administration | Tools | Configuration | Framework | Global Settings**

Contact support email content



| Priority | Estimated Response Time | Click to send an Email |
|----------|-------------------------|---|
| Low | 32 Hours |  |

Click on *Source* and search for *mailto* (this is where the changes need to be made):



An *onclick* method will need to be added to a div in order to trigger the page load function in the backend. (Please note this commit must exist on the branch you are making changes to or the

```
function SendEmail() {
  var firstMailTo = document.getElementById("hfFirstMailTo");
  if (firstMailTo != null || firstMailTo != undefined) {
    firstMailTo.click();
  }
  var secondMailTo = document.getElementById("hfSecondMailTo");
  if (secondMailTo != null || secondMailTo != undefined) {
    secondMailTo.click();
  }
  window.location.reload();
}
```

(This is an old image)

For this to happen, the image button needs to be formatted at such:

<div onclick="SendEmail(hfFirstMailTo);">

<img here - Copy image tag from the <a> tag here>

</div>

Please note: variable names for the <a> tag id as well as the function name for the div needs to be exactly the same as in the below example.

Example:

```
<div onclick="SendEmail(hfFirstMailTo);">

</div>
<a id="hfFirstMailTo" style="visibility:hidden" href="mailto:test.analyst@signify.co.za"></a>

<div onclick="SendEmail(hfSecondMailTo);">

</div>
<a id="hfSecondMailTo" style="visibility:hidden" href="mailto:test.analyst@signify.co.za"></a>
```

scr = (image path from signify)

href = (email to send to)

Setting up a link:

The above format needs to be adhered to when setting up a hyper link should the same error occur. Please use the below code snippet for the front-end html:

```
<div onclick="SendEmail(hfFirstMailTo);"> Send Email
</div>
<a id="hfFirstMailTo" style="visibility:hidden" href="mailto:test.analyst@signify.co.za"></a>
```

You can use text formatting to ensure that the link appears as a link (blue text colour underlined)

Quick Steps:

Step 1: Download Glassfit example here

https://drive.google.com/file/d/150MVQe2AS3C0TTgrFd24jEV1GbKCGuPE/view?usp=share_link

Step 2: Navigate to System Admin | System Admin | Tools | Config | Framework | Global Settings | Contact Support Email Content

Contact support email content

Source | [Icons]

[Rich Text Editor Icons]

Styles | Format | Font | Size | [Font Size] | [Bold] | [Italic] | [Underline] | [Link] | [Unlink] | [List] | [Table] | [Image] | [Media] | [Help]

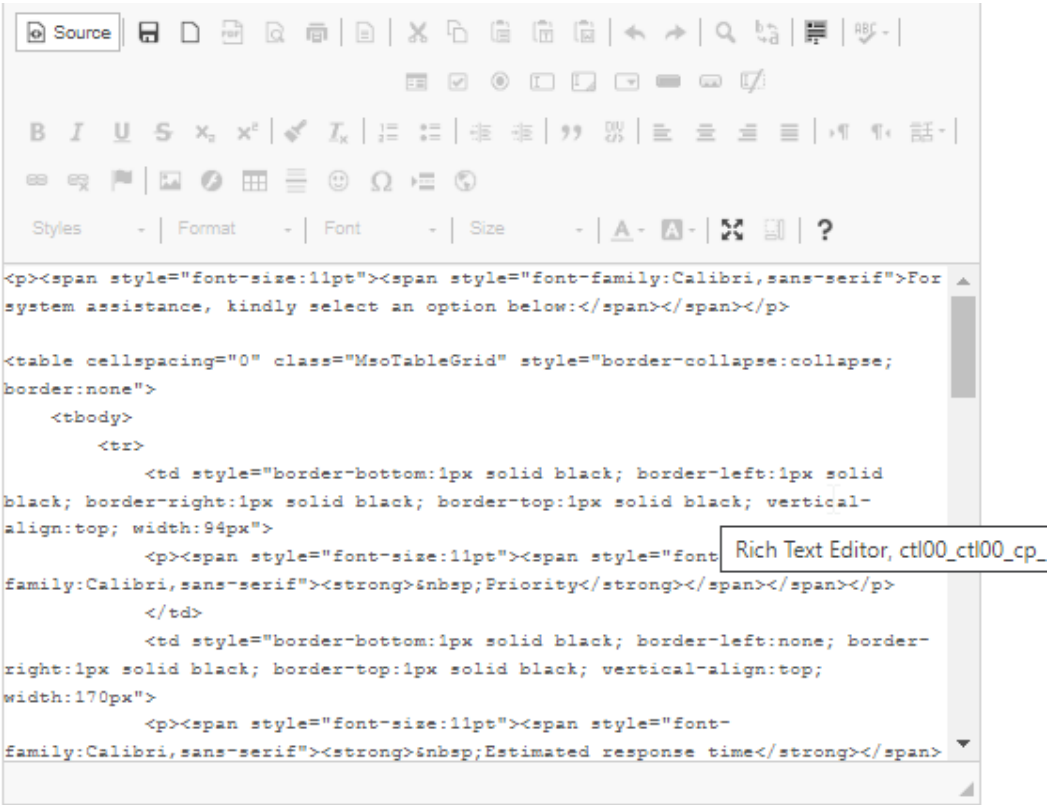
For system assistance, kindly select an option below:

| Priority | Estimated response time | Click to send an Email |
|----------|-------------------------|------------------------|
| Low | 32 Hours | |
| Normal | 24 Hours | |

We will automatically be notified of any Critical assistance items.

System support is available between 08:00 and 17:00, Monday to Friday excluding public holidays.

Step 3: Click on source



Step 4: Delete everything from block and paste all from downloaded sheet in this block.

Step 5: Scroll to bottom of page and click save.

Full HTML Example: (Used for Glassfit)

You can copy and paste this HTML into the block shown above. Click source, paste and save.

```
<p><span style="font-size:11pt"><span style="font-family:Calibri,sans-serif">For system assistance, kindly select an option below:</span></span></p>

<table cellpadding="0" class="MsoTableGrid" style="border-collapse:collapse; border:none">

<tbody>

<tr>
```

<td style="border-bottom:1px solid black; border-left:1px solid black; border-right:1px solid black; border-top:1px solid black; vertical-align:top; width:94px">

<p> Priority</p>

</td>

<td style="border-bottom:1px solid black; border-left:none; border-right:1px solid black; border-top:1px solid black; vertical-align:top; width:170px">

<p> Estimated response time</p>

</td>

<td style="border-bottom:1px solid black; border-left:none; border-right:1px solid black; border-top:1px solid black; vertical-align:top; width:151px">

<p> Click to send an Email</p>

</td>

</tr>

<tr>

<td style="border-bottom:1px solid black; border-left:1px solid black; border-right:1px solid black; border-top:none; width:94px">

<p> Low</p>

</td>

<td style="border-bottom:1px solid black; border-left:none; border-right:1px solid black; border-top:none; width:170px">

<p> 32 Hours</p>

</td>

<td style="border-bottom:1px solid black; border-left:none; border-right:1px solid black; border-top:none; width:170px; text-align: center;">

<div onclick="SendEmail(hfFirstMailTo);">

</div>

</td>

</tr>

<tr>

<td style="border-bottom:1px solid black; border-left:1px solid black; border-right:1px solid black; border-top:none; width:94px">

<p> Normal</p>

</td>

<td style="border-bottom:1px solid black; border-left:none; border-right:1px solid black; border-top:none; width:170px">

<p> 24 Hours</p>

</td>

<td style="border-bottom:1px solid black; border-left:none; border-right:1px solid black; border-top:none; vertical-align:top; width:151px; text-align: center;">

<div onclick="SendEmail(hfSecondMailTo);">

</div>

%0A%0D%0AKind%20Regards%0D%0A%0D%0A">

</td>

</tr>

</tbody>

</table>

<p>We will automatically be notified of any Critical assistance items.</p>

<p>System support is available between 08:00 and 17:00, Monday to Friday excluding public holidays.</p>