

## MyCalyx.com™ Getting Started Instruction Guide

### Adding Point users

To add an end user to MyCalyx and assign them a Point seat:

1. Click **Manage Users** to access the **Manage Users** page.

### Manage Users

**Summary**

Seats Installed 1  
Total Seats 5

**Seat Status Legend**

Status	Quantity
<span style="color: red;">●</span> Problem	0
<span style="color: yellow;">●</span> In Progress	1
<span style="color: orange;">●</span> Pending Installation	0
<span style="color: green;">●</span> Active	0
<span style="color: gray;">●</span> No Seat	1

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☐	Nickname	Username (Email)				Seat Status	Last Activity	Installation Group	Version
☐	Josh Jones	Josh@thebrokers.com	☐	☐	☑	●	11/15/2010 11:58 AM	End users	7.2SP2
☐	Brad Smith	Brad@thebrokers.com	☑	☐	☐	●	11/15/2010 08:37 AM	Admin only group	

2 Users

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Apply End User Role
Resend E-Mail
Delete

Apply Installation Settings
 
Apply Version
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2. Click the **Add a User** button to add a new record above the user list.

### Manage Users

**Summary**

Seats Installed 1  
Total Seats 5

**Seat Status Legend**

Status	Quantity
<span style="color: red;">●</span> Problem	0
<span style="color: yellow;">●</span> In Progress	1
<span style="color: orange;">●</span> Pending Installation	0
<span style="color: green;">●</span> Active	0
<span style="color: gray;">●</span> No Seat	1

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☐	Nickname	Username (Email)				Seat Status	Last Activity	Installation Group	Version
☐			☐	☐	☐	●			7.3
☐	Josh Jones	Josh@thebrokers.com	☐	☐	☑	●		End users	7.2SP2
☐	Brad Smith	Brad@thebrokers.com	☑	☐	☐	●		Admin only group	

2 Users

Apply End User Role
Resend E-Mail
Delete

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3. Enter a nickname for the user and enter the user's e-mail address in the *Username* (Email) field.
4. Assign the end user role to the user.  
You can assign the Administrator role at this time also.
5. Optionally, assign an installation group to the user by selecting an option from the dropdown list.
6. Click the Save icon (  ) to save the user.

The entry is saved and is added to the user database. The Seat Status is orange, which indicates that the installation is pending. When the installation is complete, the Seat Status changes to green, Active.

An e-mail is automatically generated and is sent to the user which informs them of the roles they were assigned and contains a link to install Point. Users who are assigned the Administrator role are sent a link to a registration page with registration instructions.

### Manage Users

**Summary**

Seats Installed 1  
Total Seats 5

**Seat Status Legend**

Status	Quantity
<span style="color: red;">●</span> Problem	0
<span style="color: yellow;">●</span> In Progress	1
<span style="color: orange;">●</span> Pending Installation	1
<span style="color: green;">●</span> Active	0
<span style="color: gray;">●</span> No Seat	1

**An email has been sent to Michael Johnson**

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Filter

☐	Nickname	Username (Email)				Seat Status	Last Activity	Installation Group	Version
<input checked="" type="checkbox"/>	Michael Johnson	Mike@thebrokers.com	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	●	11/15/2010 12:34 PM	End users	7.3
<input type="checkbox"/>	Josh Jones	Josh@thebrokers.com	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	●	11/15/2010 11:58 AM	End users	7.2SP2
<input type="checkbox"/>	Brad Smith	Brad@thebrokers.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	●	11/15/2010 08:37 AM	Admin only group	

3 Users

K < 1 > X
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Apply End User Role
Resend E-Mail
Delete

Apply Installation Settings
▼

Apply Version
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You can also add multiple users at one time from a .csv file. To use this method, refer to the MyCalyx online help for detailed instructions.

## Registering as an Administrator

When a user is assigned the role of Administrator, they will receive an e-mail notification that contains a link to register in MyCalyx. To register as an Administrator:

1. Open the MyCalyx e-mail.  
The e-mail contains a link to register and a link to a video demo about the Administrator role and functions in MyCalyx.
2. View the demo.
3. After viewing the video, click the Register link.

### Become a MyCalyx User and Experience the Full Potential of Point

When creating your password, be sure it has at least 6 characters including one upper or lower case letter and one number. All fields are required.

First Name	<input type="text"/>
Last Name	<input type="text"/>
Email Address	Brad_Smith@thebrokers.com
Password	<input type="password"/>
Re-enter Password	<input type="password"/>
I read, understood and accepted the <a href="#">Terms of Use</a> for MyCalyx.com.	<input type="checkbox"/>
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

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4. Enter your first name, last name, and password.
5. Select the check box to acknowledge that you understand and accept the MyCalyx terms of use.
6. Click **Submit**.

## Modifying user properties

To modify user properties:

1. Click **Manage Users** to access the *Manage Users* page.

**Manage Users**

**Summary**

Seats Installed 1  
Total Seats 5

**Seat Status Legend**

Status	Quantity
● Problem	0
● In Progress	1
● Pending Installation	0
● Active	0
○ No Seat	1

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Filter  Search Clear Filter

	Nickname	Username (Email)				Seat Status	Last Activity	Installation Group	Version
<input type="checkbox"/>	Josh Jones	Josh@thebrokers.com	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	●	11/15/2010 11:58 AM	End users	7.2SP2
<input type="checkbox"/>	Brad Smith	Brad@thebrokers.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	○	11/15/2010 08:37 AM	Admin only group	

2 Users

K < 1 > X Page size: 10

Apply End User Role Resend E-Mail Delete Apply Installation Settings Apply Version 7.3

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2. To change user properties for individual users, double-click the user row to enable the fields.
3. Edit the username, nickname, roles, installation group, or version and click **Save**.
4. To change properties for multiple users, select the check boxes that correspond to the users you want to change. To change the properties for all of the users that are currently displayed, select the check box at the top of the list to select all users. Use the buttons at the bottom of the screen to apply the end user role, installation settings, and Point version and to resend the e-mail or delete the user.
5. Click **Save**.

The entry is saved and added to the user database. When a role is added or a user name is updated, an e-mail is automatically generated and sent to the user.

### Important:

If more than one Administrator is editing the same record at the same time, the changes are retained in the sequence that they are saved. Therefore, changes made to the same information could be lost if another Administrator is editing the same information.

## Creating installation settings

Installation Settings are used to create installation groups with preset installation parameters for use on multiple computers in your organization.

### Note:

Using installation settings is optional. The default Point installation in a non-server environment creates the default template and data folders and includes Point Administrator.

To create an installation group:

1. Click **Manage Users** to access the *Manage Users* page.

### Manage Users

**Summary**  
Seats Installed 1  
Total Seats 5

**Seat Status Legend**

Status	Quantity
Problem	0
In Progress	1
Pending Installation	0
Active	0
No Seat	1

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	Nickname	Username (Email)				Seat Status	Last Activity	Installation Group	Version
<input type="checkbox"/>	Josh Jones	Josh@thebrokers.com	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		11/15/2010 11:58 AM	End users	7.2SP2
<input type="checkbox"/>	Brad Smith	Brad@thebrokers.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		11/15/2010 08:37 AM	Admin only group	

2 Users

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2. Click **Installation Settings**.

**Installation Settings**

Please specify setup parameters for Point to be used on every workstation: Manage Users

- Create New Settings -

Name

Application Directory Path

Templates Directory Path

Data Folder Path  +

Data Folder Path

Install Point Administrator

**PointCentral**

Enable PointCentral

PointCentral URL (https://)

PointCentral Security Key

**Windows Administrator**

Username

Password

**Installation Package Cached Location**

Location

Save Delete Cancel

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3. Select *Create New Settings* from the dropdown list, if not already selected.
4. Specify the directory to install Point. The default location is C:\WINPOINT.
5. Enter a name for the installation group in the *Name* field.

**Note:**

The **Name** field is the only required field. All other fields are optional.

6. Specify the template directory location in the *Templates Directory Path* field. The Template Directory Path is the template location where the end user is authorized to access Point templates. If the Template Directory Path is left blank, the existing setting on the local client is preserved and is not overwritten.

**Note:**

If your site runs PointCentral, the template directory, data folder paths, and their user access rights are specified in the PointCentral settings. Therefore, it is unnecessary to complete these fields.

7. Enter data folder locations in the *Data Folder Path* field that the end users who are assigned to the installation group are authorized to access. Click the plus (+) button to add the data folder to the Data Folder Path list. If the Data Folder Path is left blank, the existing setting on the local client is preserved and is not overwritten. Repeat to add additional data folders.

**Example:**

A company that uses multiple data folders (that does not use PointCentral) with different user access levels would create installation groups for each level and assign users to each group accordingly. You can assign a data folder to more than one installation group.

8. Select the **Install Point Administrator** check box to include Point Administrator in the installation. Point Administrator is not used if PointCentral is enabled. Do not select this check box if you run PointCentral.

9. Select the **Enable PointCentral** check box if you use PointCentral as your file server. If PointCentral is enabled, the data folder and template directory paths are specified in the PointCentral settings. Point Administrator is not used.
10. Enter the server URL in the *PointCentral URL: https://* field.
11. Enter the security key in the *PointCentral Security Key* field.
12. To enable Point to automatically install on your network if a Windows administrative password is required, enter the username and password of your Windows Administrator.
13. Specify the location on your server to store the Point installer in the *Installation Package Cached Location* section.

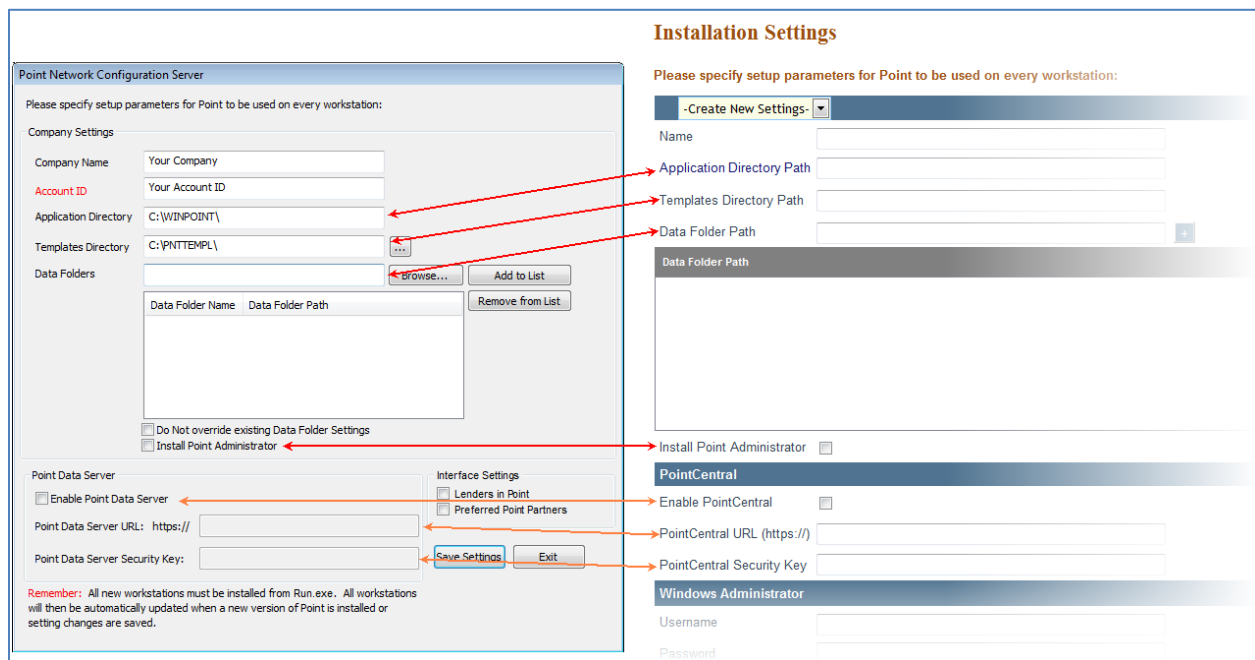
**Important:**

If you provide the location to your server, installations will be more efficient because they will initiate from your local server rather than from a remote location.

14. Click **Save** to save the settings.

**Advanced installations**

Existing users who performed advanced installations prior to using MyCalyx will find that the settings in the *Installation Settings* dialog box are the same as the settings in the *Network Configuration Server* dialog box. Therefore, Point Administrators and PointCentral users who previously set up their networks by using the Network Configuration Server can use the settings that correspond to the fields in the *Network Configuration Server* dialog box as shown in the following figure.



**End user Point installation**

When an end user is assigned a Point seat, they will receive an e-mail notification that contains a link and instructions for installing Point. When the user clicks the link in their e-mail, the Point installation is launched and begins immediately. The installation is completed per the settings in the installation group that is assigned to the end user. If an installation group is not specified, Point Administrator is installed and the default template and data folders are created.