

New Restricted-view Client Creation (Not User Creation)

Overview

This how-to covers the creation of a new Turell Group client who has a restricted view i.e. cannot see all Turell Group content, including content of other TG Clients.

Establish Client Name for use by the filter

- Login: <https://resourcespace.turellgroup.com/>
- From the contextual menu (Hamburger i.e. three short horizontal lines) in the top right -> `System` -> `Resource types` -> find `Global` and click `Metadata Fields` on the right. If you do not see System, then your user account does not have the appropriate privileges to complete this operation. Please contact Lindsey or Mark.
- Then find the `client` row and under the `Tools` column, click `Edit`
- Find `Options`, between `Field type` and `Automatic ordering` -> Click `Manage options`.
- In the first field under the list of other clients, type in the new client name or abbreviation. Best to keep it short - similar to the other entries. When done, click Add, the change is immediate (no additional save buttons need to be clicked.)

Create the filter

- Contextual menu in top right -> `System` -> `Filter`
- In the field to the right of `Create filter with name...` fill in the client name and click `Create`. Please use a name similar to the others present i.e. `clientfilter-name`, e.g. `clientfilter-overleaf` or `clientfilter-moc`. If you can, use the same `name` for `clientfilter-name` that you used above.
- Click `Create`.
- Click `Edit` to the right of the rule you just created.
- Click `Add filter rule`, then change to: `client` | `IS` | `name`, with name being the same one created in the initial step.
Note: The above are all pop-up menus with valid options available. Next, click `Add filter rule`.
- Do not change any other option.
- Click `Save`.

Group creation and filter usage

- Contextual menu in top right -> `System` -> `User groups`
- Near the bottom look for the `Create user groups called...` field.
- Please try to maintain the existing format, e.g.
 - `Client - Market of Choice`

o Client - Overleaf, Fireside

Note: It is OK to use the full name here, with spaces, capitals, etc, but Mark recommends avoiding the use of any special characters beyond -, _, and ., though the field may accept much more than that.

- When done filling out the name, click the Create button.
- In the Permissions section, there is no need to launch the permissions manager, instead, just paste in the following:
s,g,d,e0,e1,e2,f1,f8,f18,U,E
- From the Parent pop-up menu, select General Users.
- Fold down Advanced options and from the Search filter pop-up choose the previously created filter, such as clientfilter-name.
- Click Save.

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