

MyCalyx® Getting Started User Guide

Adding Point users

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

1. Click Manage Point Installations to access the *Manage Point Installations* page.

Manage Point Installations

Summary

Total Installations 1
Total Licenses 5

Filter

Seat Status Legend

Status	Quantity
● Problem	0
● In Progress	1
● Pending Installation	0
● Active	0
● Not Installed	1

Installation Settings
Import Users
Add A User
Export Users
Refresh

<input type="checkbox"/>	Nickname	Username (Email)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Seat Status	Last Activity	Installation Group	Version	Version Pending
<input type="checkbox"/>	Josh Jones	Josh@thebrokers.com	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	●	08/15/2012 05:45 PM	End users	7.6SP1	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Brad Smith	Brad@thebrokers.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	●	08/15/2012 11:10 AM	Admin only group	7.6SP1	<input type="checkbox"/>
2 Users										

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Apply End User Role
Resend E-Mail
Remove End User Role
Delete
Apply Installation Settings
Apply Version
7.6SP1

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

Manage Point Installations

Summary

Total Installations 1
Total Licenses 5

Filter

Seat Status Legend


Status	Quantity
● Problem	0
● In Progress	1
● Pending Installation	0
● Active	0
● Not Installed	1

Installation Settings
Import Users
Add A User
Export Users
Refresh

Nickname	Username (Email)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Installation Group	Version	Version Pending
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	7.6SP1	<input type="checkbox"/>
Josh Jones	Josh@thebrokers.com	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	End users	7.6SP1	<input checked="" type="checkbox"/>
Brad Smith	Brad@thebrokers.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Admin only group	7.6SP1	<input type="checkbox"/>
2 Users							

Apply End User Role Resend E-Mail Remove End User Role Delete Apply Installation Settings Apply Version 7.6SP1

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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. Select a version number from the Version dropdown list, or use the Apply Version button to apply the selected version next to the button to all selected users.
7. Click the Save icon () (SAVEICON.PNG) 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.

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.

Adding Point mobile users

To add a Point mobile user to MyCalyx:

1. Click Manage Mobile Installations to access the *Calyx Mobile* page.

Calyx Mobile™

Summary

Total Mobile Licensed Users 5

Filter

Mobile Install Legend

Status	Quantity
<input checked="" type="radio"/> Active	0
<input type="radio"/> Unused	5

<input type="checkbox"/>	Nickname	Point User ID	Activation Key	Status	Last Activity
<input type="checkbox"/>			B5163691-4C94-4299-A380-40E3EE786C38	<input type="radio"/>	
<input type="checkbox"/>			2D5B5562-E10D-4B8F-924A-26E665C49F66	<input type="radio"/>	
<input type="checkbox"/>			E4C7F773-A170-4186-9454-4E5E6CEBC0B5	<input type="radio"/>	
<input type="checkbox"/>			A0A33D01-AEF2-4369-A060-7964064665F0	<input type="radio"/>	
<input type="checkbox"/>			C7294857-748D-4314-9B8C-D4097FC0B59B	<input type="radio"/>	

5 Users

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2. Double-click a row to enable the fields for entry.
3. Enter a name for the user in the Nickname field.

Note

You can enter anything in the Nickname field. You might want to match the MyCalyx Username or Nickname or their Point User ID, however, it is not required.

4. Click the Save icon.

5. When finished entering users, select the check box for each new user, or click the check box at the top of the list to select all users, and click Send Email.

The Email Addresses dialog box is displayed which contains the selected users and a field for their e-mail addresses.

6. Enter each user's e-mail address and click Send.

The e-mail contains the activation key to activate each user's mobile device. The first time the mobile user attempts to access Point, they are prompted for their activation key. After their mobile device is activated, their Point User ID is sent to MyCalyx and populated in the Point User ID field.

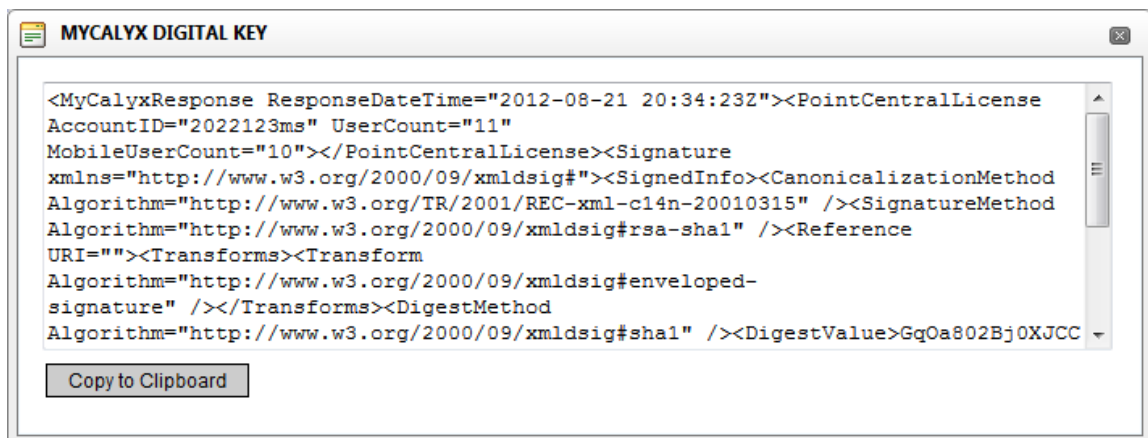
When the Point User ID field is updated, the Status changes to active, and the last activity field is populated with the current date.

Renewing the PointCentral digital key

To obtain the digital key and manually apply it to your account:

1. Go to the MyCalyx home page (click the MyCalyx link at the top of the page).
2. Click the MyCalyx Digital Key button.

The digital key for your site is displayed.



3. Click Copy to Clipboard to copy the entire key to your clipboard.

The key is retained in your clipboard until you paste it in the PointCentral Parameters MyCalyx Digital Key field or into a separate document until you are ready to paste it into PointCentral.

4. Close the MyCalyx Digital Key dialog box.

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.

- 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

Last Name

Email Address

Password

Re-enter Password

I read, understood and accepted the [Terms of Use](#) for MyCalyx.com.

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

Modifying user properties

To modify user properties:

- Click Manage Point Installations to access the *Manage Point Installations* page.

Manage Point Installations

Summary

Total Installations 1

Total Licenses 5

Filter

Seat Status Legend

Status	Quantity
● Problem	0
● In Progress	1
● Pending Installation	0
● Active	0
<input type="radio"/> Not Installed	1

Installation Settings
Import Users
Add A User
Export Users
Refresh

<input type="checkbox"/>	Nickname	Username (Email)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Seat Status	Last Activity	Installation Group	Version	Version Pending
<input type="checkbox"/>	Josh Jones	Josh@thebrokers.com	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	●	08/15/2012 05:45 PM	End users	7.6SP1	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Brad Smith	Brad@thebrokers.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	●	08/15/2012 11:10 AM	Admin only group	7.6SP1	<input type="checkbox"/>

2 Users

K < 1 > X Page size: 10

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

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- To change user properties for individual users, double-click the user row to enable the fields.
- Edit the username, nickname, roles, installation group, or version and click Save.
- To change properties for multiple users, select the check boxes next 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.
- 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:

- Click Manage Point Installations to access the *Manage Point Installations* page.

Manage Point Installations

Summary

Total Installations 1
Total Licenses 5

Filter

Seat Status Legend

Status	Quantity
● Problem	0
● In Progress	1
● Pending Installation	0
● Active	0
● Not Installed	1

Installation Settings
Import Users
Add A User
Export Users
Refresh

<input type="checkbox"/>	Nickname	Username (Email)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Seat Status	Last Activity	Installation Group	Version	Version Pending
<input type="checkbox"/>	Josh Jones	Josh@thebrokers.com	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	●	08/15/2012 05:45 PM	End users	7.6SP1	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Brad Smith	Brad@thebrokers.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	●	08/15/2012 11:10 AM	Admin only group	7.6SP1	<input type="checkbox"/>

2 Users

K < 1 > X Page size: 10

Apply End User Role
Resend E-Mail
Remove End User Role
Delete
Apply Installation Settings
Apply Version
7.6SP1

2. Click Installation Settings.

Installation Settings

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

Manage Point Installations

-Create New Settings-

Name

Terminal Services Installation

Templates Directory Path

Data Folder Path **Add**

Data Folder Path

Remove

Move Up

Move Down

Install Point Administrator

PointCentral

Enable PointCentral

PointCentral URL (https://)

PointCentral Security Key

Windows Administrator

Username

Password

Installation Package Cached Location

Location

Save **Delete This Installation Group** **Cancel All Changes**

3. Select Create New Settings from the dropdown list, if not already selected.
Specify the directory to install Point. The default location is C:\WINPOINT.
4. 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.

5. Select the Terminal Services Installation check box if your site has a terminal services installation setting.
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 Add 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.
8. Repeat to add additional data folders.
9. 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.
10. 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.
11. Enter the server URL in the PointCentral URL: https:// field.
12. Enter the security key in the PointCentral Security Key field.
13. 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.
14. Specify the location on your server to store the Point installer in the Installation Package Cached Location section.

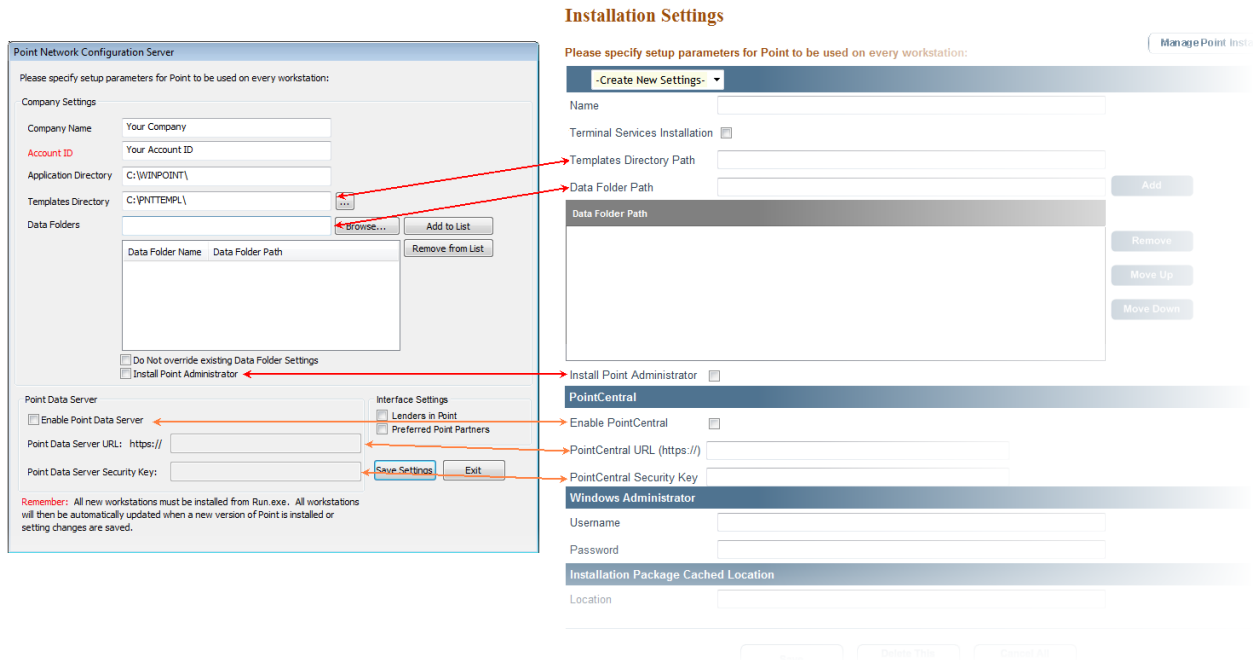
Important

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.

15. 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 license, 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.