

.Getting started with the workbench v1

On this page we introduce the basics of getting started with the Workbench.

First, a tenant has to be created in the Workbench for an organization or department.

If your organization is interested to start working with the Workbench, do not hesitate to contact us at: info@beinformed.com.

On this page:

- [On this page we introduce the basics of getting started with the Workbench.](#)
- [Your user role\(s\)](#)
- [Login](#)
- [User account](#)
- [Further reading](#)

Your user role(s)

To work with the Workbench an tenant admin has to add you to the user group of the tenant (see our [administrator guide](#) for tenant admin instruction) and has to assign the needed user role(s).

User roles determine access to certain functions and menu options. A user can have multiple roles.

	Workbench user	Docket manager	Source manager	Bundle manager	Documentation portal user	Ticket manager	Tenant administrator
Create dockets		✓					
Assign docket owner		✓					
Create projects Import project	✓	✓					
Add docket and project assignments	✓	✓					
Annotate Interpret Review	✓						
Use register sources	✓	✓					
Finalize and publish frame bundles		✓					
Manage register sources			✓				
Finalize and publish source bundles			✓				
Use Documentation portal	✓	✓	✓	✓	✓	✓	✓
Create Documentation portal tickets	✓	✓	✓	✓	✓	✓	✓
Process Documentation portal tickets						✓	
Restart Documentation portal				✓			
Manage tenant users and user roles							✓

Note: Before a workbench user or docket manager can see and access a particular docket they first have to be assigned to that docket. This can be done by anybody who is already assigned.

Workbench user versus docket assignment

Apart from these user roles, everybody involved with a docket also gets an assignment. For example docket owner, or analyst, or reviewer. These assignments are strictly workflow related and do not have any bearing on what you can or cannot do in the Workbench.

Do note, however, that a docket always has to have at least one docket owner.

Login

As soon as you are added as a user you will receive an activation email with a link to the Workbench and your temporary password:

Activation mail

Hi Robert,

Your Workbench account has been created by your administrator. You can login by following the link below and login with your username and temporary password.

When logging in to the Workbench for the first time you will be asked to change your password.

These are your credentials:

Username: r.carter

Password: #####

Follow this link to continue to the Workbench

Happy modeling!

Best regards,
Workbench account administration,
Administrator

You can login with the temporary password. You will be instructed to update the password immediately.

Change password

Old password

New password

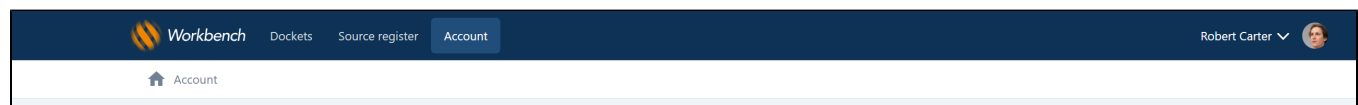
Confirm new password

Cancel

Finish

User account

When you are logged in you will see a set of tabs (depending on your user role and thus permissions).



The Dockets tab shows the list of dockets that you have access to. For more information on dockets and how to use them, see [Working with the workbench](#).

The Source register is the application in which sources are made available. For more information see [Sources and the source register](#).

Your Account shows the following:

Account

My account

Organization

Tenant name

Be Informed

Administrator(s)

Name	Email address
Robert Carter	r.carter@beinformed.com

Profile

Add avatar

Name	Robert Carter
Username	r.carter
Email address	r.carter@beinformed.com
Status	Active
Roles	Team manager, Tenant administrator
Account status	Active

Notice how you can have one or multiple user roles in the Workbench. These roles determine what you can see and do. Contact your tenant admin if your role doesn't match your responsibilities.

Avatar

On your account page, you are able to view and edit your personal details. Updating your avatar will help the recognizability of your involvement with dockets and projects.

Update avatar

Allowed extensions are: jpg, png, jpeg

Maximum file upload size is 86.29 MB

Cancel

Update

Further reading

- [Tenant and user management administrator guide](#)
- [Be Informed Workbench overview](#)
- [Sources and the source register](#)
- [Working with the workbench](#)
- [Workbench terminology](#)