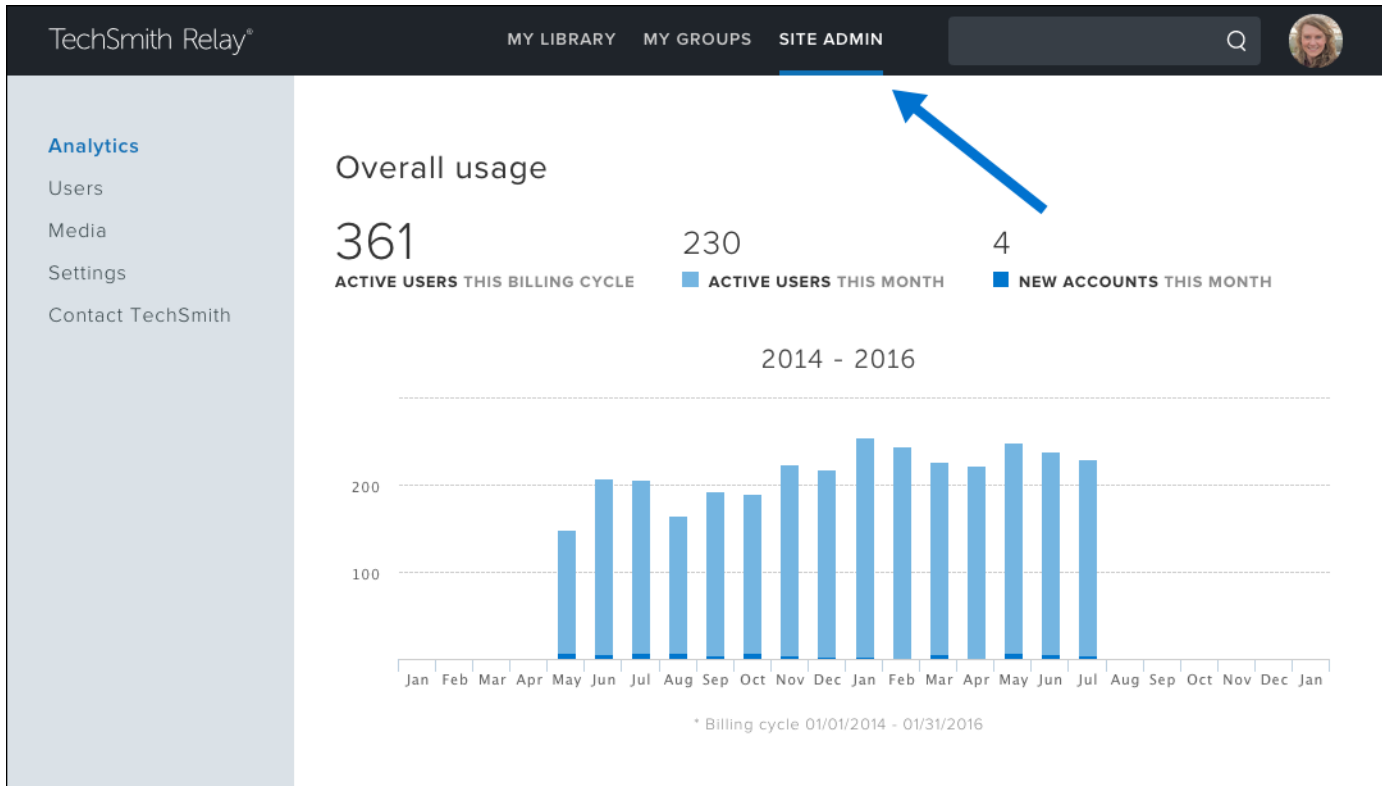


TechSmith Relay Site Admin Guide

TechSmith Relay is designed to require very little work or maintenance on the part of the Site Admin. Site Admin do not have to be technically savvy, and you can assign any number of Site Admins to your instance of TechSmith Relay.

In this guide, we will go over the five key responsibilities of a TechSmith Relay Site Admin. Everything shown in this guide can be found in the Site Admin page. You can access the Site Admin panel by logging in to your TechSmith Relay website and selecting Site Admin from the top navigation. Only Site Admins will see this tab.



Five Key Site Admin Responsibilities

1. **Analytics tab:** Track overall usage of your TechSmith Relay instance by monitoring the number of active users and new accounts that have been activated.
2. **Users tab:** Enable or revoke additional Site Admins, define who has permission to create content and add it to the system, change a user's role, grant permission to those outside your organization to access the site (optional whitelist permissions), revoke a user's access, and delete a user's content.
3. **Media tab:** View all media within your TechSmith Relay website, search for media by title, delete media as necessary, and transfer media from one user to another.

4. **Settings tab:** Control how users can access the system (email domain, service code, or organizational identity provider), limit content permissions (who can add, copy and share content and what type of content is allowed), and establish the contacts from your organization who TechSmith can contact, should the need arise.
5. **Contact TechSmith tab:** View the TechSmith Relay Customer Care Team and Technical Support contact information.

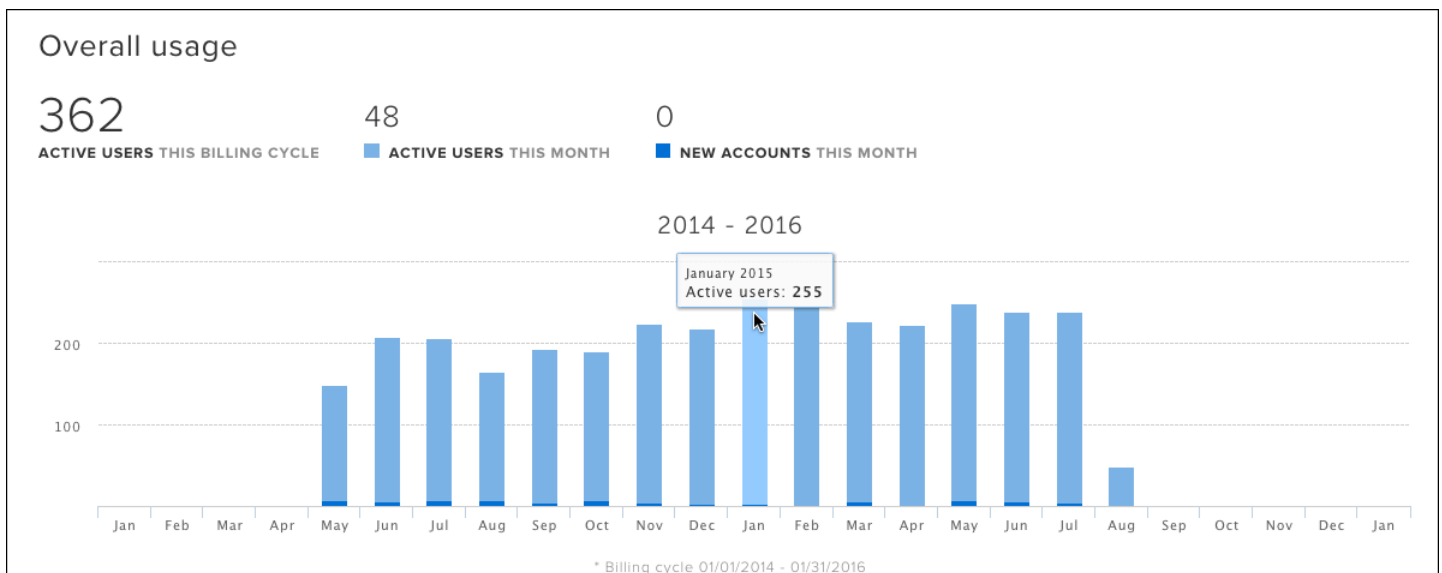
The Analytics Tab

The Analytics Tab is used to track the overall usage of your TechSmith Relay instance by seeing the number of **active users** in a month or billing cycle and the number of **new accounts** activated in a month.

An **active user** is a single user that logs in to the system at least once. Total active users are calculated for the entire billing cycle, but can also be viewed by month by hovering your cursor over the respective month on the graph (shown below).

A **new account** is a user that has logged in to TechSmith Relay for the very first time. Note: Users that are added by group invitations are not considered a new account until the user activates the account by logging in to the website.

When looking at **Overall Usage** (displayed on the following page), the number in the upper left shows the total number of active users for the current billing cycle. Below that, the active users and new accounts for the current month are displayed. The graph to the right shows the number of new accounts as a subset of active users for each month. Mouse over the graph for any month to see exact numbers. By default, the graph only shows the current billing cycle, but clicking the [+] button will expand the graph to display previous billing cycle data.

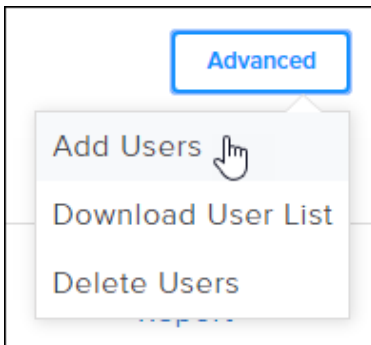


Users Tab

All the users within your TechSmith Relay instance can be found under the Users tab. The users are listed in alphabetical order, by email address. For each user, you can see their display name, email address, profile picture, and role.

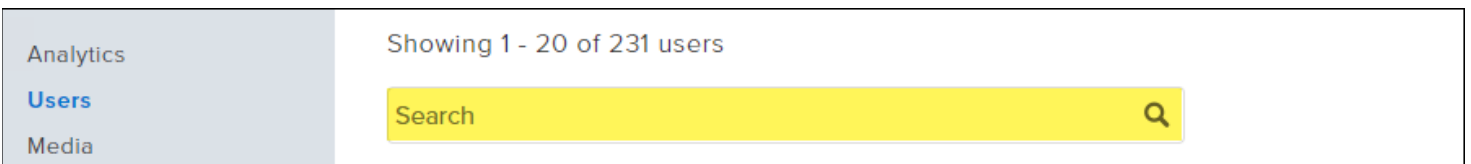
| <input type="checkbox"/> | NAME | ROLE | MANAGE |
|--------------------------|--|---------|---------------------------------|
| <input type="checkbox"/> |  Aleta Bradbury a.bradbury@tscu.edu | Creator | Download Report |

Note that you can manually add users by using the Advanced menu:



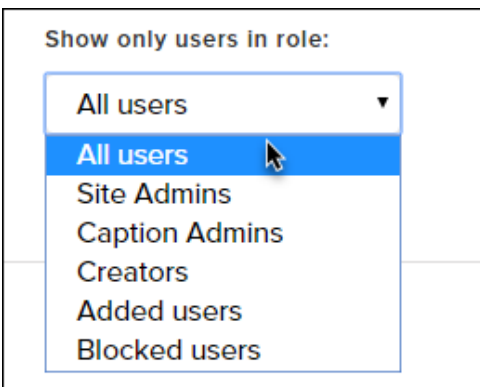
Searching for Users within your TechSmith Relay Website

You can find specific users within your TechSmith Relay site by using the search bar. This allows you to search for users by email address.



Different User Roles in TechSmith Relay

Users can be filtered by role: All users, Site Admins, Caption Admins, Creators, Added users, and Blocked users.



1. All Users


This list will show the users who have access to your TechSmith Relay website.

2. Site Admins

This list will show the users who have administrative rights in your TechSmith Relay website. To add a Site Admin, select a user from the list, then select Edit role from the dropdown and click Apply.

Bulk actions: **Show only users in role:**

Edit role ▼
Apply
All users ▼
Advanced

| <input type="checkbox"/> | NAME | ROLE | MANAGE |
|-------------------------------------|--|---------|---------------------------------|
| <input checked="" type="checkbox"/> |  Aleta Bradbury a.bradbury@tscu.edu | Creator | Download Report |

In the dialog below, you can assign user roles. Select the Site Admin option and click Apply Changes to give a user Site Admin access.

Assign User Roles ✕

The following users will be affected by these changes:

a.bradbury@tscu.edu

Select all that apply:

- Site Admin:** Can manage all media, users, user roles, groups, closed captions, and site settings.
- Caption Admin:** Can assign caption editors and edit closed captions for all non-private videos in the system.
- Creator:** Can upload and manage their own media. Can create and manage groups.
- Viewer:** Can view media, take quizzes, and join groups.

Apply Changes
Cancel

All Site Admins have the power to add and remove other Site Admins. Anyone with Site Admin access can search for another user in the system and edit his or her role.

***Please Note:** Users do not receive an email notification when they are added as Site Admins, nor is a TechSmith Relay account automatically created for them, if they do not already have one. This functionality simply gives specific users Site Admin privileges once they log in to the system.

Site Admins have the following abilities:

General Site Administration

- Change site authentication method
- Whitelist content creators (if applicable)
- Add and delete users
- Block users
- Assign user roles
- View all site analytics

Group Management

- Join any group (so they can add content to the group and/or receive notifications)
- Add and delete groups
- Add, remove, and promote group members

Media Management

- Delete any content in the system
- Create and upload content to the system
- Change the privacy level of media
- View private (Only You) media
- Caption any media in the system
- Assign specific users to caption any video in the system
- Reassign media content to other users in the system
- View analytics data
- Edit and delete quizzes
- View quiz results

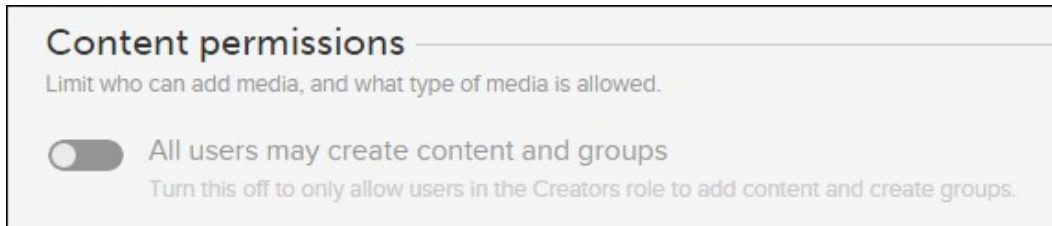
3. Caption Admins

This list will show you the users who have permission to caption any non-private video within your TechSmith Relay website. Caption Admins can also assign specific users to caption any video in the system.

4. Creators

This list will show you the users who have permission to create content and groups within your TechSmith Relay website.

The Creator role is only relevant if you have “All users may create content and groups” set to Off under Content Permissions on the Settings tab (see image below). When this switch is turned off, only users added to the Creators list can create content and groups. Use this tab to specifically “whitelist” certain users that will be able to create content and groups in your TechSmith Relay website.



***Please Note:** Users do not receive an email notification when they are added as creators, nor is a TechSmith Relay account automatically created for them, if they do not already have one. This functionality simply gives specific users creator privileges.

4. Added Users

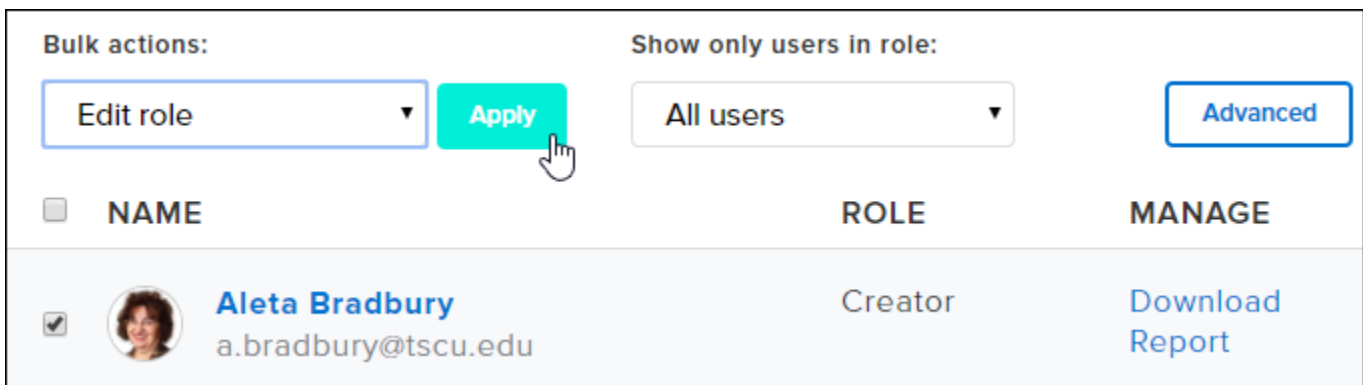
This list will show you a list of the users who have been invited to groups, but have yet to log into TechSmith Relay.

5. Blocked Users

This list will display the users whose access to your TechSmith Relay instance has been revoked. You can block any user from your user list at any time. Likewise, you can reinstate access to any user on the blocked users list at any time.

Changing a User’s Role in TechSmith Relay

Unless otherwise indicated by a Site Admin in the Content permissions section on the Settings tab, all users who create a TechSmith Relay account can add their own content and groups. Change a user’s role by clicking on the user (or checking the box next to the user’s account picture), choosing Edit role from the action dropdown, and clicking Apply.



Assign User Roles ✕

The following users will be affected by these changes:

a.bradbury@tscu.edu

Select all that apply:

- Site Admin:** Can manage all media, users, user roles, groups, closed captions, and site settings.
- Caption Admin:** Can assign caption editors and edit closed captions for all non-private videos in the system.
- Creator:** Can upload and manage their own media. Can create and manage groups.
- Viewer:** Can view media, take quizzes, and join groups.

Apply Changes
Cancel

Once you've edited the user's role, be sure to click on Apply Changes to save, or Cancel if you have made a mistake or no longer wish to change the user's role.

Revoking a User's Access to your TechSmith Relay Website

There are three ways to revoke a user's access to your TechSmith Relay website. Revoking a user's access does not delete that user's content.

1. Block a User

1. On the Users tab, select the user(s) to block. From the Bulk actions dropdown, select Block user. Click Apply.

Bulk actions:

Block User ▼

Apply

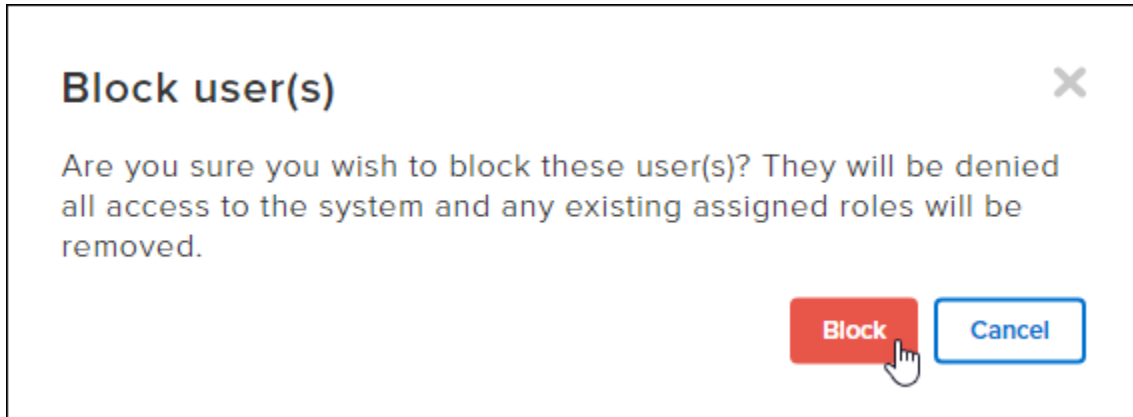
Show only users in role:

All users ▼

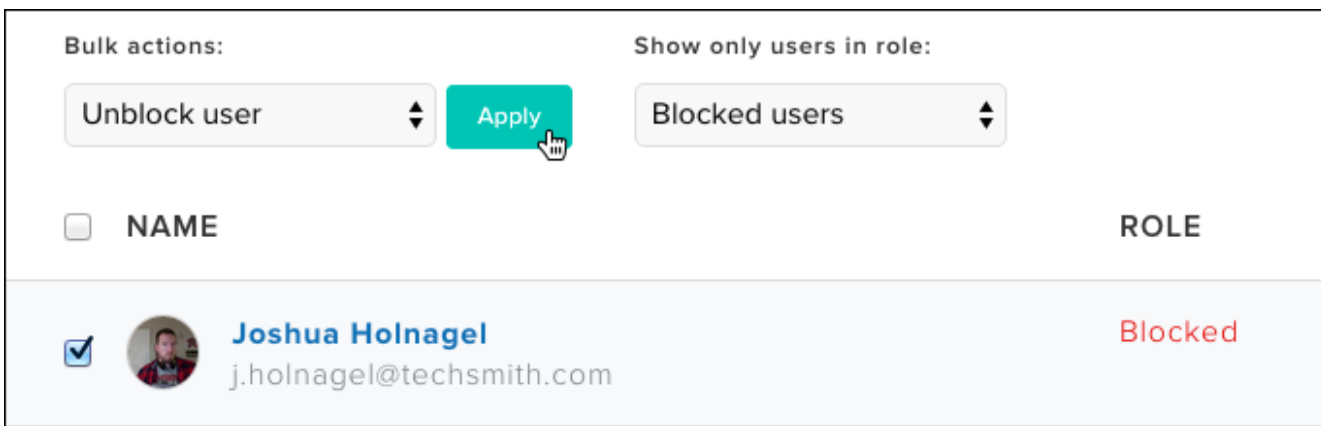
Advanced

| | NAME | ROLE | MANAGE |
|-------------------------------------|--|---------|--|
| <input checked="" type="checkbox"/> | <p>Aleta Bradbury a.bradbury@tscu.edu</p> | Creator | Download Report |

- A message dialog appears. Click Block to revoke the user’s access to your TechSmith Relay instance. Click Cancel if you do not want to save the changes or if the block was done in error.

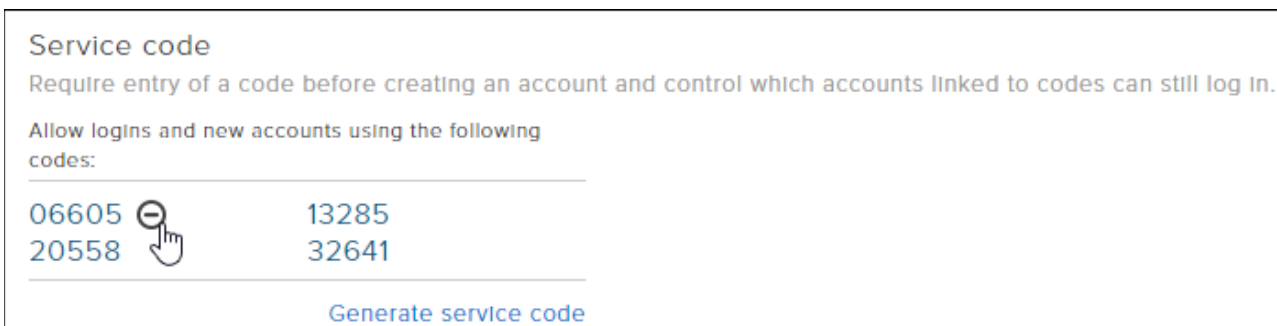


Any users you have blocked will be added to the Blocked users list. They will no longer be listed under the All users list. You can reinstate access to any user at any time.

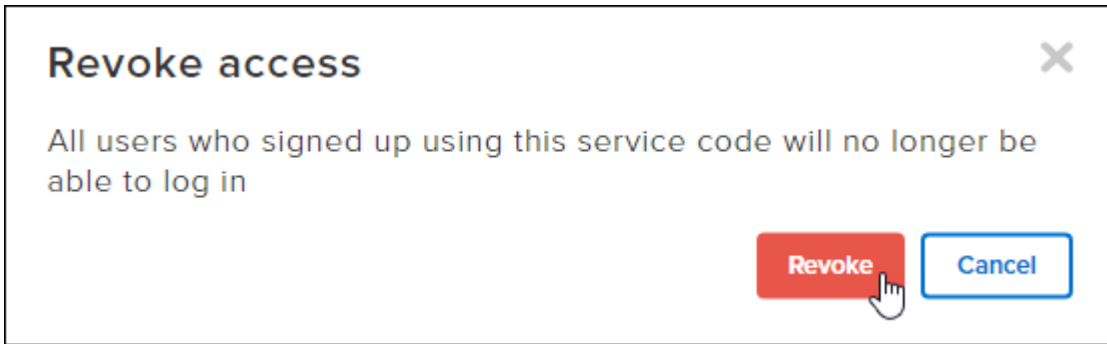


2. Revoking Access of a Service Code

If you use the Service Code method to authenticate accounts in your TechSmith Relay site, you can delete the Service Code to revoke users’ access by hovering your cursor over the code and clicking on the delete icon. Any user who initially logged in with a revoked service code must then re-authenticate with a new service code or by email (whichever is required) to regain access to your TechSmith Relay website.



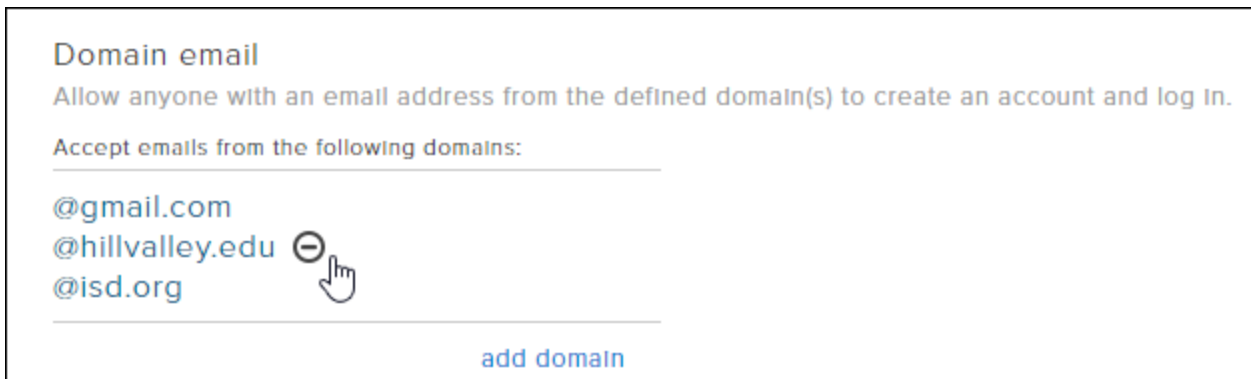
A message dialog appears. Click Revoke to revoke the users' access to your TechSmith Relay instance or click Cancel to discard the changes if this was done in error.



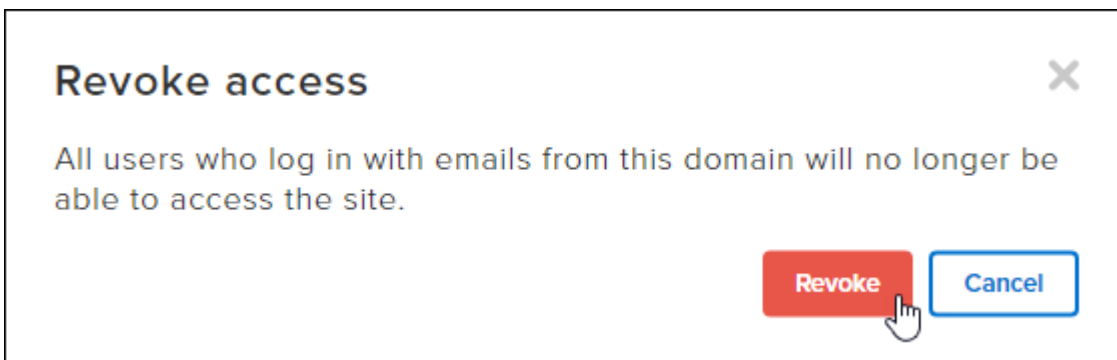
***Please Note:** Once you have deleted a service code and revoked users' access, the action cannot be undone and the same code cannot be regenerated.

3. Revoking Access of Domain Email

If you have used the Domain Email method to authenticate accounts in your TechSmith Relay site, you can delete the Domain Email to revoke users' access by hovering your cursor over the code and clicking on the delete icon.



A message dialog appears. Click Revoke to revoke the email domain's access to your TechSmith Relay instance or click Cancel to discard the changes if this was done in error.



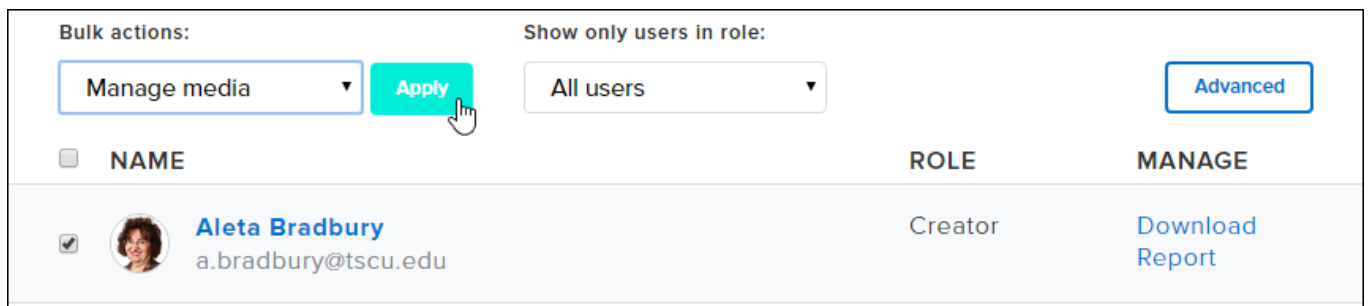
Any user who initially created an account and logged in with this specific email domain, will no longer have access to your TechSmith Relay site.


Deleting all of a User's Content from TechSmith Relay

A Site Admin can delete all of the content belonging to a specific user in a TechSmith Relay website.

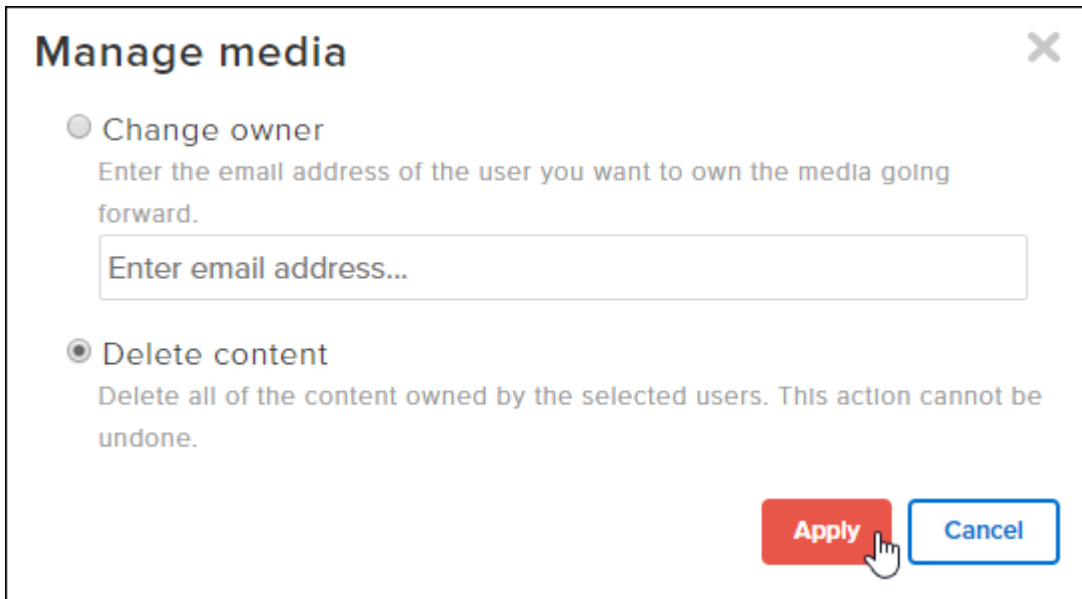
***Please Note:** While this action will delete all of a specific user's media content, it does not revoke the user's access to the TechSmith Relay website. Blocking a user is an action that will need to be done separately.

1. To delete a user's content, select the user from the User list, check the checkbox, choose Manage media from the action dropdown, and click Apply.



| <input type="checkbox"/> | NAME | ROLE | MANAGE |
|-------------------------------------|--|---------|---------------------------------|
| <input checked="" type="checkbox"/> |  Aleta Bradbury a.bradbury@tscu.edu | Creator | Download Report |

2. The Manage media message appears. Here you can either change the owner of the user's media, delete the user's media or cancel the action.



3. Click Apply.

***Please Note:** If you delete a user’s content, this action cannot be undone. The user’s content is removed from your TechSmith Relay website. The content will no longer appear in the search results or in groups. The user’s profile will still exist on TechSmith Relay and the user will show up in your All users list. If you selected to also block this user, the user will appear in the Blocked users list instead.

Media Tab

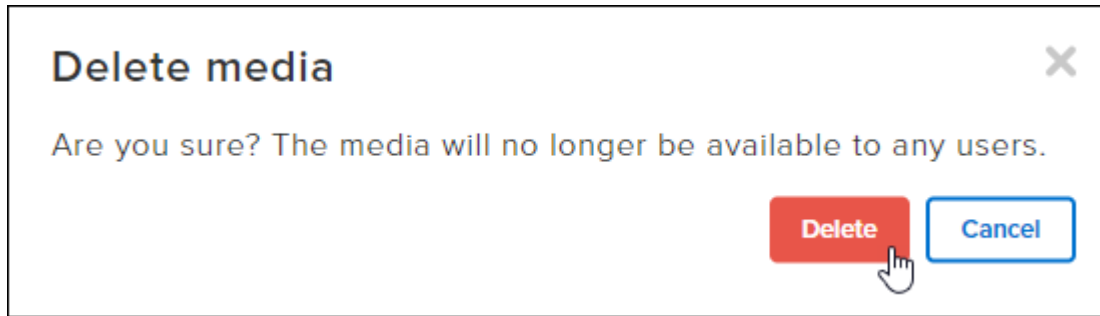
All of the media within your TechSmith Relay website can be found under the Media tab. This includes all media created by users, as well as all videos added from YouTube.

You can search for media by title. If you click the media’s title in the search results, the media viewing page opens. If you click the user’s name, his or her TechSmith Relay profile page will open.

To delete media:

1. Select the checkbox next to the media to delete. From the Bulk actions dropdown, select Delete Media. Click Apply.

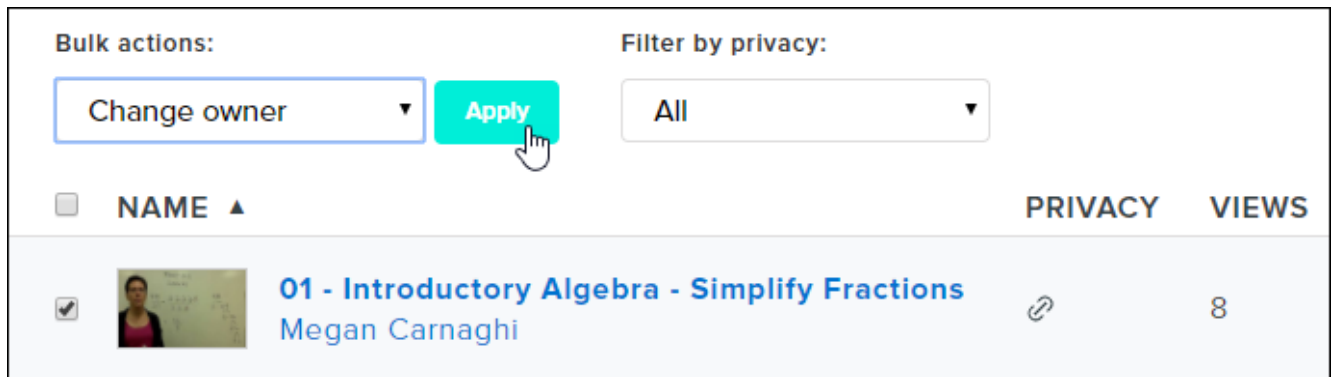
2. A message dialog appears. Click Delete to delete the user's content. Click Cancel if this was done in error.



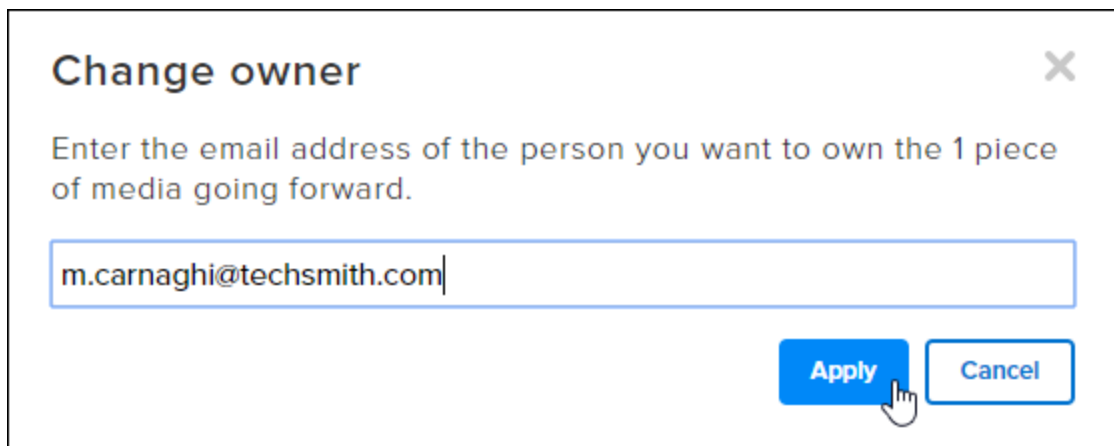
***Please Note:** If you delete a user's content, this action cannot be undone.

To change the owner of a piece of media:

1. Select the checkbox next to the media to change. From the Bulk actions dropdown, select Change Owner. Click Apply.



2. A message dialog appears. Enter the email address of the new owner and click Apply.

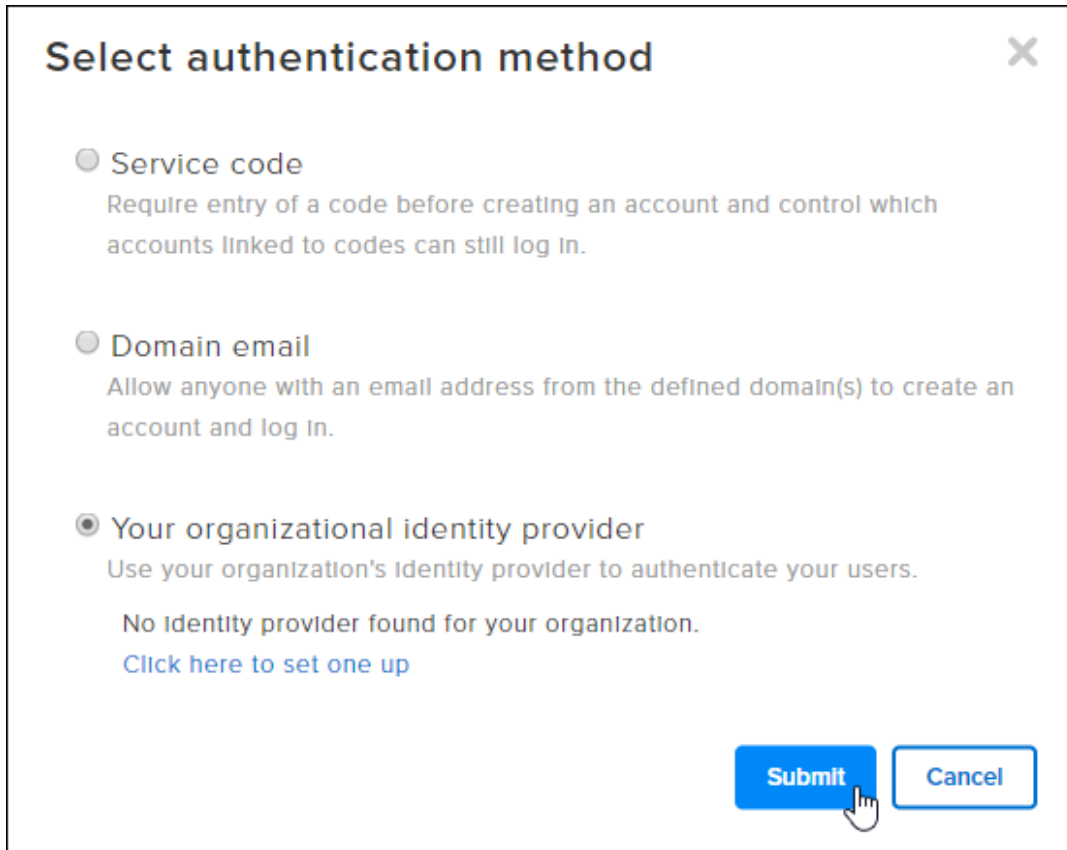


The Settings Tab

The Settings tab controls who has access to the system and default permissions for content and group creation.

Login and New Account Authorization – Change Authentication Method

There are three ways to limit access to the website.



Select authentication method ✕

Service code
Require entry of a code before creating an account and control which accounts linked to codes can still log in.

Domain email
Allow anyone with an email address from the defined domain(s) to create an account and log in.

Your organizational identity provider
Use your organization's Identity provider to authenticate your users.

No identity provider found for your organization.
[Click here to set one up](#)

Option One: Service Code Method

Use the service code when you have users with a variety of email addresses. For example, perhaps you want to use the system with many people outside of your domain. You can also generate multiple random codes and delete individual codes at will to block users that utilized that specific code.

Users will be required to enter the code when signing into the system for the first time. Users still need to create a TechSmith Account by manually creating one or by using their Google ID (if applicable).

Option Two: Domain Email Method

Use this option when you know most of your users are coming from your school or organization. By allowing "@exampleschool.k12.us," users who can verify their email at this domain will be allowed to create accounts without the need for a code.

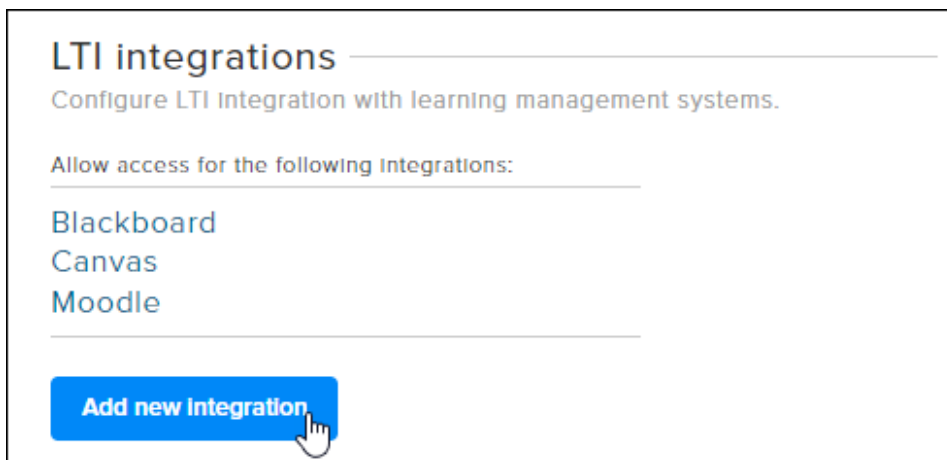
When a user creates a TechSmith account with their organizational email, they can then log in using their organizational email and a password of their choosing.

Option Three: Your Organizational Identity Provider

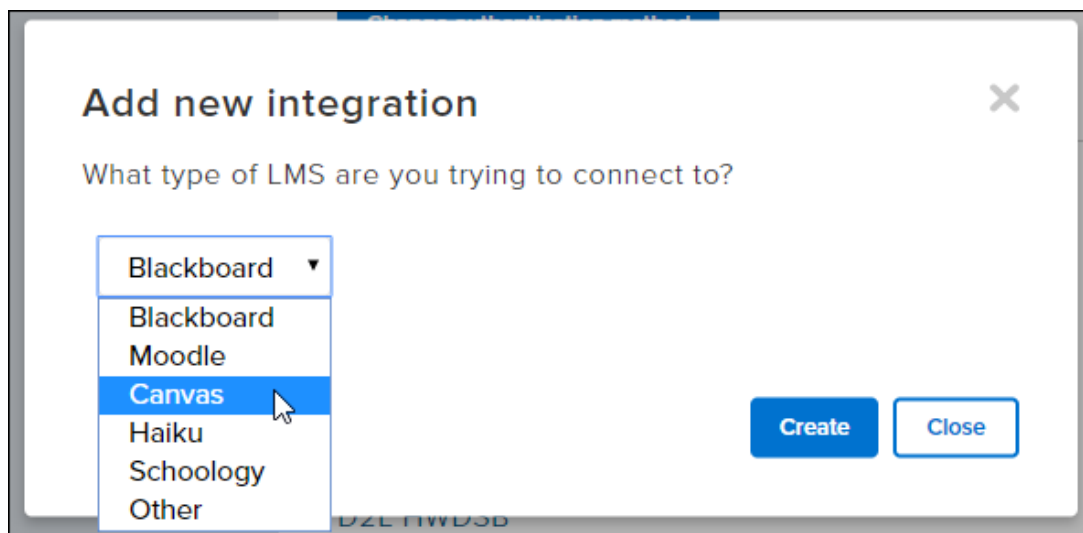
If your organization uses an organizational identity provider, such as Azure Active Directory, you can now use your system's functionality in TechSmith Relay to create and authenticate user accounts. This means users will no longer have to create their own accounts manually or verify their credentials via email. Users can now use the credentials assigned to them through your organizational identity provider as their TechSmith Relay account credentials as well. Please contact TechSmith for more information on integrating your identity provider with TechSmith Relay.

Learning Management System Integration

To integrate a Learning Management System (LMS) with TechSmith Relay, select Add new integration under the LTI integrations section.



From the dropdown menu, select the LMS you wish to integrate with and click Create.



You will then be provided with the necessary information to connect your LMS to TechSmith Relay.

Set Content Permissions

Content Permissions for allowing users to create content and groups, share content from YouTube, copy other users' media into their media library, and share other users' media are turned on by default when your TechSmith Relay instance is created. Please adjust these settings per your organization's needs.

When the switch is blue and the circle is positioned to the right, the switch is turned on. When the switch is grey and the circle is positioned to the left, the switch is turned off.

Content permissions

Limit who can add media, and what type of media is allowed.

- All users may create content and groups
Turn this off to only allow users in the Creators role to add content and create groups.
- Users may share content from YouTube
Turn this off to prevent users from sharing YouTube content.
- Show 'Copy' media option to viewers
Turn this off to hide the 'Copy' and 'Duplicate' options from viewers.
- Show 'Share' media option to viewers
Turn this off to hide the 'Share' option from viewers.
- Users may share content with the public
Turn this off to prevent users from sharing content with people outside of your organization.

1. "All users may create content and groups" Switch

If turned to the off position, Site Admins must manually determine who has permission to download the recorder, create groups, and upload content by giving them the Creator role (see page 6 for more information on the Creator role).

The on position offers more flexibility, and is recommended if you plan on allowing any member of your organization to create content.

2. "Users may share content from YouTube" Switch

If turned to the on position, users will be allowed to share videos from YouTube to your TechSmith Relay site.

If turned to the off position, users are prevented from sharing YouTube content to your TechSmith Relay site.

3. "Show 'Copy' media option to viewers" Switch

If turned to the on position, users will be allowed to make a copy of another user's media and add it to their media library for use.

If turned to the off position, users are prevented from copying another user's media and adding it to their media library for use.

4. "Show 'Share' media option to viewers" Switch

If turned to the on position, users will be allowed to share other users' media via a provided URL.

If turned to the off position, users are prevented from sharing other users' media via URL.

5. "Users may share content with the public" Switch

By default, this setting is turned off. If turned to on, users will have the ability to make their media public, meaning viewers will not need a TechSmith account to view content that has been made available publicly.


Response Team

Under this section on the Settings tab, we ask that you provide us with 3 contacts from within your organization that TechSmith can contact, should the need arise. Users must be Site Admins to be added to the Response Team.

Set response team members by typing their email address into the Enter contact email field.

TSCU Response team

The following group of people have been assigned to you to ensure you're successful with TechSmith Relay. Please contact them with any questions related to TechSmith Relay.



This person is the main point of contact between the user and TechSmith. If a decision needs to be made regarding the system, this person will make the decision or be in charge of conveying the decision to TechSmith on the organization's behalf.

Once you have added a Response Team member, you can change their title or description by hovering the cursor over his or her title and clicking the edit icon.



Megan Carnaghi

This person is the main point of contact between the user and TechSmith. If a decision needs to be made regarding the system, this person will make the decision or be in charge of conveying the decision to TechSmith on the organization's behalf.



 m.carnaghi@techsmith.com

 (517) 381-2300

Preferably, we would like a main contact, a technical contact, and an instructional contact. This and all other sections in the Site Admin page are only viewable to those users you make a Site Admin. Additionally, you can only add contacts to the Response Team if you have already made them a Site Admin in your system.

The Contact TechSmith Tab


Under this tab, your response team members will be able to see the members of your personalized TechSmith Relay Care Team and an explanation of their role on the team. You will also have access to the team's contact information and will be able to contact them directly from within your TechSmith Relay website. You will also have direct access to our Technical Support team from here, as well. **This page is only viewable to those users you make a Site Admin and add to the Response Team in your system.**



Relay Care Team

The Relay Care Team is your main point of contact for TechSmith Relay. They can answer general questions about rollout, how-to's, admin settings, and more.

 relaycareteam@techsmith.com


 517-381-2300 (Ext. 111)



Technical Support

Something not quite right? You can reach our Technical Support Team Monday-Friday, from 8am-7pm EST.

 [Submit a support ticket](#)

 +1 888-750-0686