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SyOps Admin Portal

The SyOps Admin Portal is a web application for managing Security Operating Procedures. Security Operating Procedures, or SyOps, are the acceptable-use agreements that users accept before using the EssingtonITS DEAN Windows client. This portal is where administrators write those documents, publish them, track who has accepted them, and run reports.

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What this product is for

Many organisations need their staff to acknowledge a written policy before they can use a particular computer system. Keeping that process tidy usually means two things: the policy text has to live somewhere, and there has to be a reliable record of who accepted which version and when.

This portal solves both problems in one place. Administrators can author and update the policy text, and the system automatically keeps an audit trail of every acceptance. Reports turn that audit trail into something easy to read, filter, and export.

Main features

- **SyOps management:** Write new agreements, save drafts, preview them, publish live versions, and see the full version history.
- **Ref Types:** Define the different kinds of users (for example, standard users and admin users) and the small username suffixes that route each user to the right agreement.
- **Portal users:** Add and remove the people who can sign in to the admin portal, change their admin status, and reset their passwords.
- **Reports:** Check-activity card showing today's already-agreed vs needed-to-agree donut and a 14-day trend, a filterable audit log of every acceptance, per-agreement compliance, CSV export, and a printable PDF view.
- **Settings:** Admin-only page for re-acceptance diff, optional acceptance webhook, branding and theme of the agreement page, and how long check-activity history is

kept.

- **Self-service profile:** Every signed-in portal user can change their own password.
- **Dashboard:** At-a-glance view of how many live SyOps exist, how many users the system has seen, and the most recent acceptances.
- **End-user accessibility:** The agreement page itself has a built-in accessibility panel users can open to adjust text size, spacing, dyslexia-friendly font, and colour theme.

How to use it

Signing in

1. Open the portal address in your browser.
2. Enter your portal username and password on the sign-in screen.
3. Select **Sign in**. You will land on the dashboard.

If your password is wrong, the sign-in page will tell you and give you another attempt. If you do not yet have an account, ask another administrator to create one for you.

The dashboard

The dashboard is the first screen you see after signing in. It summarises the current state of the system:

- The number of live SyOps in circulation.
- The number of distinct users the system has seen accept a SyOp.
- A short list of the most recent acceptances.
- A compliance table showing, for each live SyOp, how many users have accepted it.

The dashboard is read-only. Use the sidebar on the left to move into each management area.

Managing SyOps

Open **SyOps** from the sidebar. The page is divided into three sections: **Live**, **Drafts**, and **Archived**. Each row shows the agreement's reference type, status, and the actions you can take on it.

Creating a new SyOp

1. Select **New SyOp**.
2. Choose a **Ref Type** from the drop-down list. This decides which group of users will see this agreement.
3. Write the agreement in the rich text editor. You can format text, add lists, add links, and paste in formatted content.
4. Choose a status: **Draft** to keep working on it, or **Live** to publish it immediately.
5. Select **Save**.

If you choose **Live** and another SyOp with the same Ref Type is already live, the portal shows a warning. Publishing will archive the old version and require every existing user to accept the new one on their next sign-in.

Editing a draft

Drafts can be edited in place. Open the draft from the SyOps list, make your changes, and save. No acceptances are affected.

Editing a live SyOp

Live SyOps are deliberately not edited in place. Saving changes to a live SyOp publishes a *new version*. The previous version moves to the Archived list, and users will need to accept the new one. This protects the audit trail every accepted version is preserved exactly as it was at the time it was accepted.

Promoting a draft to live

On any draft row, select **Promote**. If a live SyOp already exists for that Ref Type, it is automatically archived in the same step.

Archiving

Select **Archive** on any live or draft row. A confirmation dialog appears before the action takes effect. Archived SyOps are kept for reference but are no longer offered to users.

Previewing and viewing history

The **Preview** button on any row opens the agreement text in a pop-up so you can read it exactly as users will see it. When editing a live SyOp, a **Version history** panel lists every previous version; each one can be previewed without leaving the page.

Managing Ref Types

Open **Ref Types** from the sidebar. A Ref Type describes a category of user for example, *Standard User* or *Admin User* and tells the system how to decide which agreement to show each person.

Each Ref Type has two fields:

- **Type:** Friendly label, shown to administrators.
- **Postfix:** Small suffix on the end of a user's username (for example, `.a`) that identifies that type. An empty postfix acts as the default for everyone who does not match a longer one.

To add a Ref Type, select **New Ref Type**, fill in the fields, and save. To rename or change a postfix, select **Edit** on the row. To remove a Ref Type, select **Delete**. The portal will refuse to delete a Ref Type that is still in use by a SyOp and will explain why in the dialog.

Managing portal users

Open **Users** from the sidebar. Portal users are the people who can sign in to this admin portal they are not the end users who accept SyOps.

Adding a user

1. Select **New User**.
2. Enter a username and a password of at least eight characters.

3. Tick **Admin** if the new user should have full administrator rights.
4. Save.

Editing or resetting a password

Select **Edit** on a user's row. You can change their admin status and, if you need to, set a new password. Leaving the password field blank keeps the existing password.

Deleting a user

Select **Delete** on the row. The portal will refuse to delete your own account, and it will refuse to delete the last remaining administrator. These safeguards stop you from accidentally locking yourself or the organisation out.

Reports

Open **Reports** from the sidebar. The page has three parts.

- **Check activity:** A doughnut chart for today shows how many users were already up to date versus how many were asked to accept a new version. A line chart underneath shows the same split over the last 14 days. This is updated every time the Windows client checks a user.
- **Compliance by Live SyOp:** Each live agreement, how many of the known users have accepted it.
- **Acceptance Audit Log:** Every recorded acceptance, with time, username, Ref Type, and source IP address.

Above the audit log you will find a set of filters:

- **Username:** Type a name and press Enter.
- **Ref Type:** Pick from the drop-down.
- **From** / **To:** Pick a date range.

Select **Apply** to refresh the results, or **Reset** to clear every filter.

Exporting to CSV

With your filters set the way you want, select **Export CSV**. The file you download contains exactly what is on screen and can be opened in Excel or any other spreadsheet.

Printable PDF view

A printable version of the report is available. Open it, then use your browser's **Print** command. Choose **Save as PDF** (or **Print to PDF**) as the destination to create a PDF file.

Changing your own password

1. Open **Profile** from the sidebar.
2. Enter your new password twice. It must be at least eight characters.
3. Select **Save**.

Settings

Open **Settings** from the sidebar. The page groups four areas of portal-wide configuration. Changes take effect immediately for any agreement page loaded after you save.

Re-acceptance diff

When this is on and a user is shown a new version of an agreement they previously accepted, the agreement page highlights what has changed since their last acceptance and adds **Previous change** and **Next change** buttons that jump between each change. Useful when you publish a new version with only small edits users do not need to re-read the whole document. Turn it off if the change highlights ever look noisy on your content.

Activity history retention

Every time the Windows client checks whether a user is up to date, the portal records the result. This setting controls how long those records are kept, in days. Set it to **0** to keep records forever. Older records are tidied up automatically the next time an administrator opens the Reports page.

Webhook

Optional. When a user accepts an agreement, the portal can send a notification to a system you choose for example, an internal monitoring tool or another database. To use it:

1. Tick **Enable webhook**.
2. Paste the destination URL.
3. Pick the kind of authentication the destination expects: *None*, *HTTP Basic*, *Bearer token*, or *Custom header*. Fill in the credential fields that appear.
4. Select **Send test** to fire a sample event and check the receiver replies with an OK.
5. Select **Save**.

The webhook is best-effort: if the destination is slow or unreachable, the user's acceptance is still recorded and the user is not affected. Failures are logged for an administrator but no error is shown to the user. The audit log on the Reports page is always the source of truth.

Branding and theme

Lets you make the end-user agreement page look like the rest of your environment. You can pick a *Light*, *Dark* or *Custom* mode, upload a header logo with left, centre, or right alignment, optionally upload a background image, and add a footer (such as a company name or contact line). The settings page shows a live preview as you change values.

Logo and background image uploads accept PNG, JPG, GIF, or WebP up to **3 megabytes**. Each upload appears in the preview straight away. Use **Remove logo** or **Remove background** to clear it.

The end user's own accessibility choices if they switch to dark mode or high contrast in the panel on the agreement page take precedence over your theme. This is intentional and protects users who need a particular look in order to read.

What end users see when they accept an agreement

When a user reaches the agreement page they see the full agreement text and an **I Agree** tick-box. In the top right of the page is an **Accessibility** button. Opening it reveals a small panel with these options:

- **Text size: S**maller / larger, in five steps.
- **Wider spacing:** Increases line and letter spacing for easier reading.
- **Dyslexia-friendly:** Switches to a font designed for dyslexic readers.
- **Dark** and **High contrast** themes mutually exclusive colour schemes for low-light or low-vision use.
- **Reset:** Returns everything to the defaults.

The user's choices are remembered on their device, so they do not need to set them again next time. The panel is fully keyboard-accessible and announces each change to assistive technology.

If you have switched on the re-acceptance diff feature and the user has agreed to a previous version of the same agreement, an amber banner appears at the top of the page noting that the agreement has changed since their last acceptance, with **Previous change** and **Next change** buttons that jump between the highlighted differences.

Signing out

Use the **Log out** link at the bottom of the sidebar. This clears your session straight away.

Common tasks

- **Publish a revised agreement:** Edit the live SyOp, save, and confirm publication. The previous version is archived and users will be prompted to accept the new one.
- **Help users see only what changed:** Settings, switch on *Show diff on re-acceptance* . Anyone who has accepted an earlier version will get the new agreement with the changes highlighted and Previous / Next buttons.
- **Match the agreement page to your branding:** Settings, pick a theme mode, upload a logo, optionally upload a background image, and add a footer. Use the live preview to fine-tune.

- **Send acceptance events to another system:** Settings, switch on the webhook, paste the destination URL, choose authentication, and use **Send test** to confirm.
- **Introduce a new category of user:** Add a Ref Type with an appropriate postfix, then create a SyOp for that Ref Type.
- **Onboard a new administrator:** Add them under Users, tick the Admin box, share the temporary password, and ask them to change it on first sign-in via Profile.
- **Send an acceptance report to an auditor:** Set the date range in Reports, apply, export the CSV, and attach it to an email; or open the printable view and save it as a PDF.
- **Tidy up old activity records:** Settings, set *Keep all activity history for…* to the number of days you want to retain. Older records are removed automatically next time you open the Reports page.
- **Remove an obsolete agreement:** It will no longer be offered to users, but its history will still be visible in the portal.

Things to know

- **Live SyOps are immutable.** Editing a live SyOp always creates a new version. This keeps the audit trail honest you can always see exactly what was agreed to at any point in time.
- **Publishing a new live version resets acceptances for that Ref Type.** Every user who has already accepted the old version will be asked to accept the new one the next time they sign in.
- **Username routing uses the longest matching postfix.** If a user's username ends with `.a` and a Ref Type with that postfix exists, they see that agreement. Otherwise they see the agreement whose Ref Type has an empty postfix the default for everyone else.
- **Safeguards on user deletion.** The portal never lets you delete your own account or the last administrator. If only one administrator remains, they cannot be demoted

either.

- **Passwords must be at least eight characters.** This applies to new users, password resets, and self-service changes.
- **Archived SyOps stay visible.** They are not deleted; they simply stop being offered to end users. You can still view them through version history.
- **The audit log is append-only.** Acceptances are never amended or removed, so the evidence trail can be trusted.
- **Sessions expire.** If you leave the portal idle for a long time, you may be asked to sign in again. Any unsaved work in a form will be lost.

Troubleshooting

I cannot sign in

Check that you are typing your username and password correctly. The portal shows a red message under the heading if the combination was rejected. If you have forgotten your password, ask another administrator to reset it for you from the Users page.

The portal sent me back to the sign-in page unexpectedly

Your session has likely expired. Sign in again and you will be returned to the area you were using.

I cannot delete a user

The portal prevents you from deleting your own account and from deleting the last remaining administrator. Either sign in as a different administrator to delete the first user, or add a second administrator before removing the current last one.

I cannot delete a Ref Type

A Ref Type that is still attached to one or more SyOps cannot be deleted. The delete dialog will tell you so. Archive or reassign the SyOps first, then try again.

Publishing a SyOp warned me about wiping acceptances

This is expected. Publishing a new live version for a Ref Type automatically archives the previous live version and asks every user in that category to accept the new one. If that is not what you want, save the work as a draft instead.

A user says they keep being asked to accept the agreement

This usually means a new version has just been published for their Ref Type. Each user needs to accept each new version once. If the behaviour continues after a fresh acceptance, contact the administrator who published the latest version to check its status.

Frequently asked questions

What is a SyOp?

A Security Operating Procedure a short written agreement that a user reads and accepts before using a particular system. In this portal, you author those agreements and track their acceptance.

What is a Ref Type?

A category of user. Ref Types let you show different agreements to different groups. For example, administrators can be shown a different SyOp to standard users.

Why do I need a postfix on a Ref Type?

The postfix is a small suffix on a username (such as `.a`) that tells the system which Ref Type a user belongs to. The Ref Type with the longest matching postfix wins. A Ref Type with an empty postfix is the default for anyone who does not match a more specific one.

What happens when I edit a live SyOp?

A new version is published and the old one is archived. All previous acceptances are preserved in the audit trail, and affected users will be asked to accept the new version.

Can I recover a SyOp I archived by mistake?

Archived SyOps are kept in the Archived section. If you need it live again, create a new SyOp with the same content and publish it, which will produce a fresh version for users to accept.

Can the same user accept more than one SyOp?

Yes. A user's Ref Type (determined by their username) decides which agreement they see. If you introduce a new Ref Type they fall into, they will be asked to accept the matching agreement.

Can I undo a password reset?

No. Once you set a new password for a user, the previous password cannot be recovered. If you reset one by mistake, the affected user should sign in with the new password and set a password of their choice from their Profile page.

How far back does the audit log go?

The log contains every acceptance ever recorded since the system began keeping records. Use the date filter to narrow a report to a specific period.

Can I export a report?

Yes. Set the filters you want and select **Export CSV**. For a document you can attach to a report, use the printable view and save it as a PDF from your browser's print dialog.

Do I need to do anything special to protect my data in the audit log?

No. The log is append-only by design and the portal itself cannot modify or delete entries. Your responsibility is to keep your administrator credentials safe.

What does the webhook send, and to where?

When a user accepts an agreement, the portal sends a small JSON message to the URL you configured in Settings. The message contains the username, agreement identifier, Ref Type, time of acceptance, and source IP. It is sent once per acceptance, with no retries. If your destination is unreachable, the user's acceptance is still recorded normally; only the notification is lost.

Can I make the agreement page look like our company?

Yes. In Settings, the *Branding and theme* section lets you choose a colour mode, upload a header logo (with left, centre, or right alignment), upload a background image, and add a footer. The settings page shows a live preview as you change things.

Can a user override the colours I chose?

Yes, deliberately. Each user has an Accessibility panel on the agreement page where they can switch to a dark or high-contrast theme that suits them. This protects users who need particular colours in order to read. They cannot change other users' experience only their own.

Why does the report say a user "needed to agree" when they did agree?

The check activity card counts each individual check the Windows client makes. A single user logging in twice in one morning will appear as two checks the first might be "needed to agree", the second "agreed". Both reflect what was true at the moment of the check, which is the right behaviour for an audit view.

Summary

The SyOps Admin Portal gives you everything you need to write, publish, and track acceptance of Security Operating Procedures without spreadsheets or email trails. Create a SyOp, assign it to a Ref Type, publish it, and the portal records every acceptance for you. Reports and exports turn that record into evidence you can share. The built-in safeguards on users and versioning keep the process from going sideways, so you can focus on the content of your agreements rather than the mechanics of tracking them.