Settings and Operations

Overview

Settings and Operations pages let platform administrators manage runtime configuration, themes, notification delivery, backups, jobs, updates, documents, and selected feature flags.

Purpose

Use Settings and Operations to configure how CMS behaves without changing application files, and to manage operational workflows such as backups, notifications, update settings, and branding.

Settings Categories

Category	Typical contents
Authentication	Sign-in, activation, MFA, and federated login settings.
Backup	Backup provider, tooling, storage, and retention settings.
Billing	Invoice settings, invoice visibility, billing mode, and usage selection.
Notifications	Email provider, delivery settings, budget alerts, and notification templates.
Platform	Defaults, self-provisioning, region retention, quotas, timezone, and platform options.
Portal	Portal title, theme, login options, and display configuration.
Updates	Update enablement, channel, Patch Manager connection, and update settings.

User Roles

Settings and operational administration are platform areas. Platform administrators can change settings and run operational actions. Platform readers can review information where permitted.

Key Workflows

Update a Setting

1. Open Settings.
2. Select the relevant category tab.
3. Search or browse to the setting.
4. Change the value.
5. Save changes.
6. Follow any operational note, such as rerunning a job or refreshing a page.

Manage Notification Templates

1. Open Administration > Notifications.
2. Select Templates.
3. Open a template.
4. Review subject, description, enabled state, and body content.
5. Save changes.
6. Send a test message where available.

Manage Backups

1. Open Backups.
2. Review existing backup files.
3. Run a manual backup when needed.
4. Test storage settings before relying on a backup target.
5. Restore only after confirming the target backup and operational approval.

Manage Themes

1. Open Settings > Themes.
2. Create or edit a theme.
3. Add logos, wallpaper, font information, colors, and theme options.
4. Validate and save.
5. Set the theme as default when ready.

Sensitive Settings

Sensitive settings such as passwords, connection strings, and API keys are masked in the portal. When a masked value is left unchanged, CMS keeps the existing value.

Only replace sensitive settings when the new value is known and approved for the environment.

Documents and Terms

Documents and terms can require user or tenant acceptance before users continue normal portal work. New subscription terms can appear during subscription creation when enabled.

What To Check

If a setting or operational action is missing, check:

1. The user's platform role.
2. Whether the environment has been prepared for that feature.
3. Whether required sensitive settings are configured.
4. Whether the relevant feature is enabled.

Related Pages

- Authentication and Users
- Alerts, Jobs, and Updates
- Usage, Billing, and Invoicing

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