Intranet DASHBOARD
Quick Start Guide

Version 2.2 | www.intranetdashboard.com

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Contents

Purpose of this Quickstart Guide

The Quickstart Guide is designed to provide administrators with an introduction to the core functionality of Intranet DASHBOARD. As such, it provides instruction on the major functions of the most used tools in the system. It does not cover every tool or every function; however after reviewing this document and receiving training, an administrator of Intranet DASHBBOARD should be able to create and configure subsites, upload and create content, and use the major business and collaboration tools.

For more extensive instruction on the use of specific tools, please refer to the Help that is available in the Admin system of Intranet DASHBOARD.

1. The Essentials

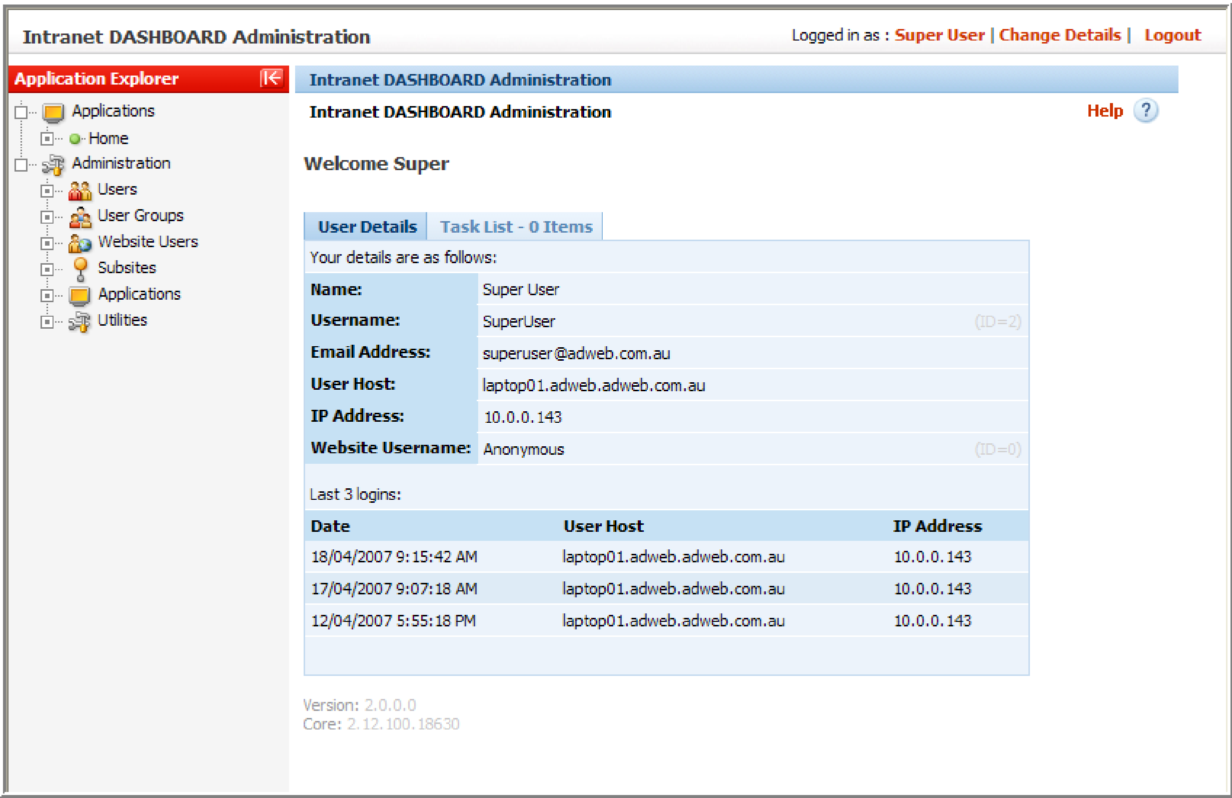
1.1.1. Login to the administration

Step 1: Open a web browser and go to **http://*yourintranet*/admin** (where *yourintranet* is the name of your intranet)

Step 2: Use the default login username: "**superuser**", password: "**dashboard**" and click login (**Please Note:** this may have been changed following the installation of Intranet DASHBAORD).

Step 3: If this is the first time you have logged into the administration section of your intranet you will be prompted to confirm/change your details, including your password

Note: Once you have logged in you may change your details (including your password) by clicking the **Change Details** button at the top right hand corner of the screen.



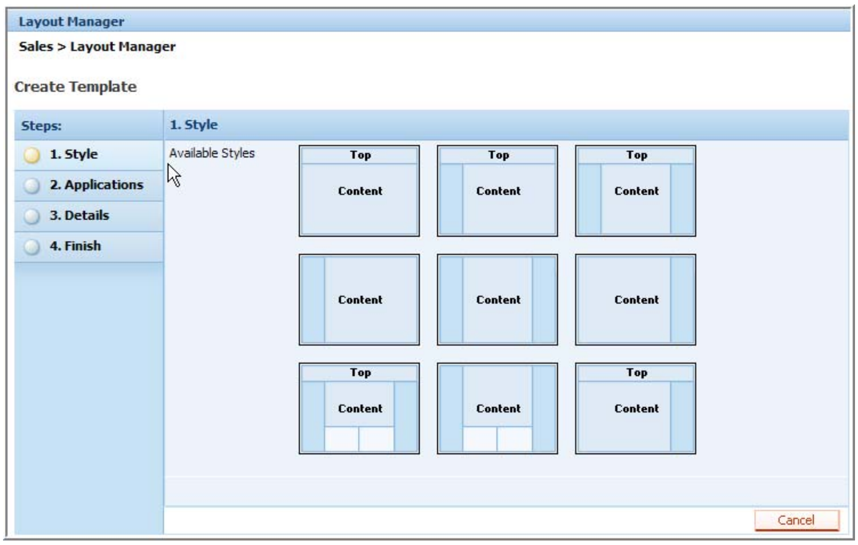
Note: To first access the front end, **http://*yourintranet***, in login mode, the default username and password is "**guest**", "**guest".**

1.1.2. Homepage layout - Creating a template

The *Layout manager* is a tool that allows you to set up the screen layout for the homepage of your home site and additional subsites. Before you can create a layout you need to create a template to base the layout upon.

Step 1: Click on **iD Home > Layout Manager > Advanced** and **Create New Template**.

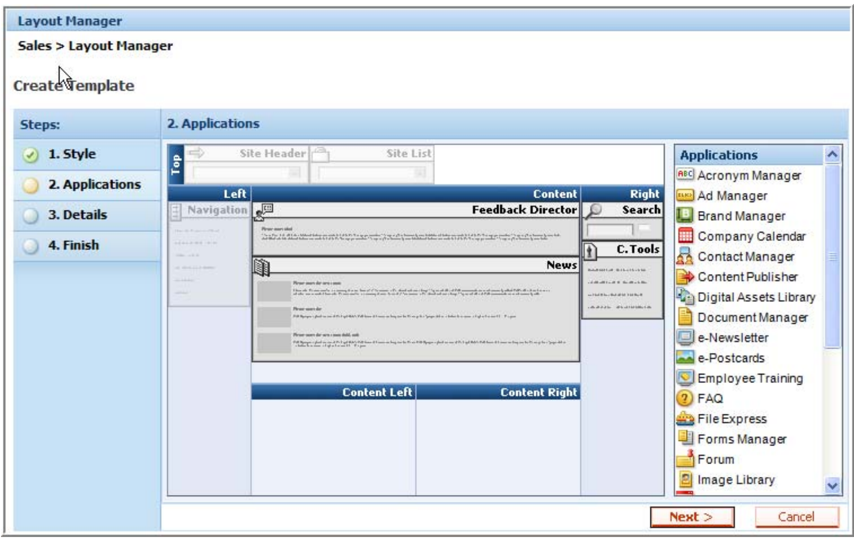
Step 2: Select a structure to base the template on, one with top, centre pane and left and/or right panes is recommended (Style 3 or 7).



Step 3: Click on an application you wish to include and drag it onto the template in the place you want it. By double clicking on an application in the template the application is locked, which ensures that any future layouts based on this template (subsites) must have the application in the same spot. When you have finished adding applications to your template click **Next** to continue.

Recommended applications to be included are:

- *Site Header* – in top pane (lock)
- *Site List* (to give quick access to subsites) – top pane (lock)
- *Nav Editor* (provide links to other pages or subsites) – left/right pane (lock)
- Search – left/right pane
- *Clever Tools* (quick access to applications) – left/right pane
- *News* – centre pane



Step 4: Type in a name for the template. Be sure to check the box next to the name of your home site (and any relevant subsites) to allow the template to be available to that site. If you would like this template to be the default layout for future subsites check the **Is Default** checkbox.

Step 5: Click **Next** to continue

Step 6: Then click **Finish**

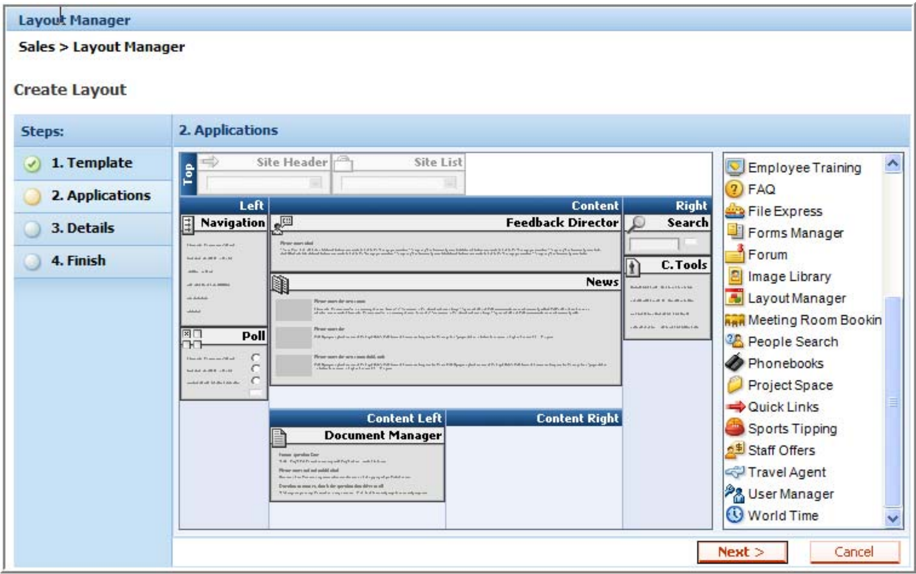
1.1.3. Homepage - Applying the template

Now that you have a template you can create a layout based upon that template

Step 1: Click on your **Home site (or subsite) > Layout Manager > Create Layout**.

Step 2: Click on the image of the template you created earlier.

Step 3: If need be, re-organize or add applications according to how you wish your homepage to look, then click **Next**.



Step 4: Select the check box to allow your layout to become active.

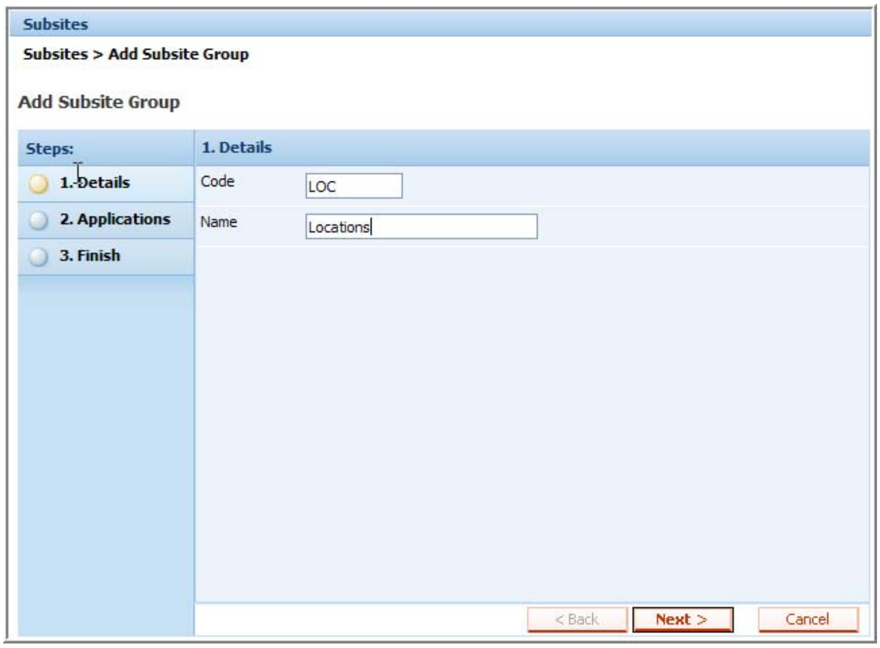
Step 5: Click **Finish** to save the changes you have made.

1.1.4. Subsites - Setting up a subsite group

Subsite groups are a way of organizing your subsites into logical groupings.

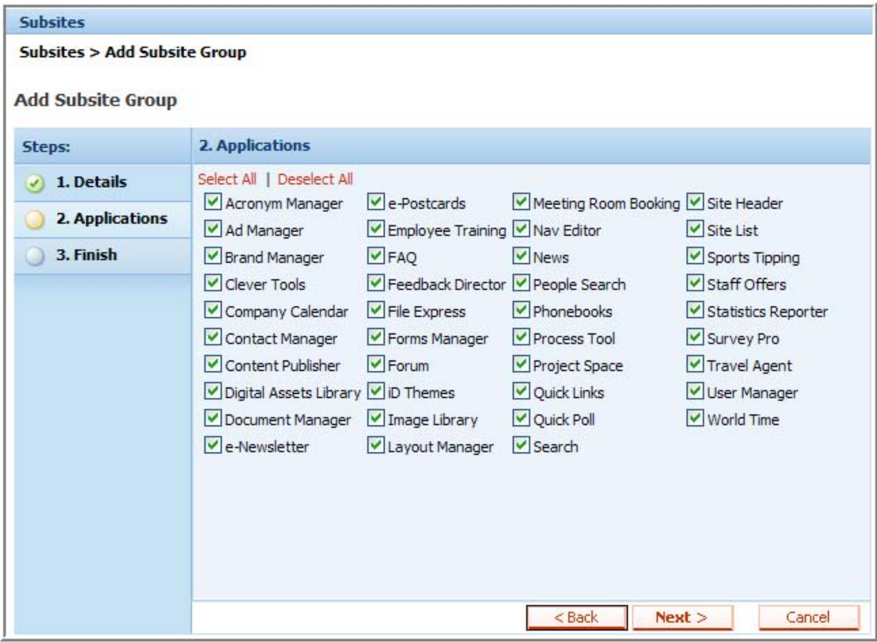
Step 1: Every subsite must belong to a subsite group, therefore before adding a subsite we must create a subsite group. To do this select, **Administration > Subsites > Subsite Groups** and **Add Subsite Group**.

Step 2: Enter the Subsite Group Code (something unique e.g. LOC) and Name (e.g. Locations) and click **Next** to continue.



Step 3: Select the applications you wish this Subsite Group to have access to and click **Next** to continue.

Note: Turning off applications for a Subsite Group will apply to all Subsites created within that group



Step 4: Check the details are correct, click **Back** to make any changes or **Finish** to save.

1.1.5. Subsites - Adding a subsite

Step 1: Select **Administration > Subsites** and **Add Subsite**.

Step 2: Enter all the details of the Subsite ensuring you select the appropriate status.

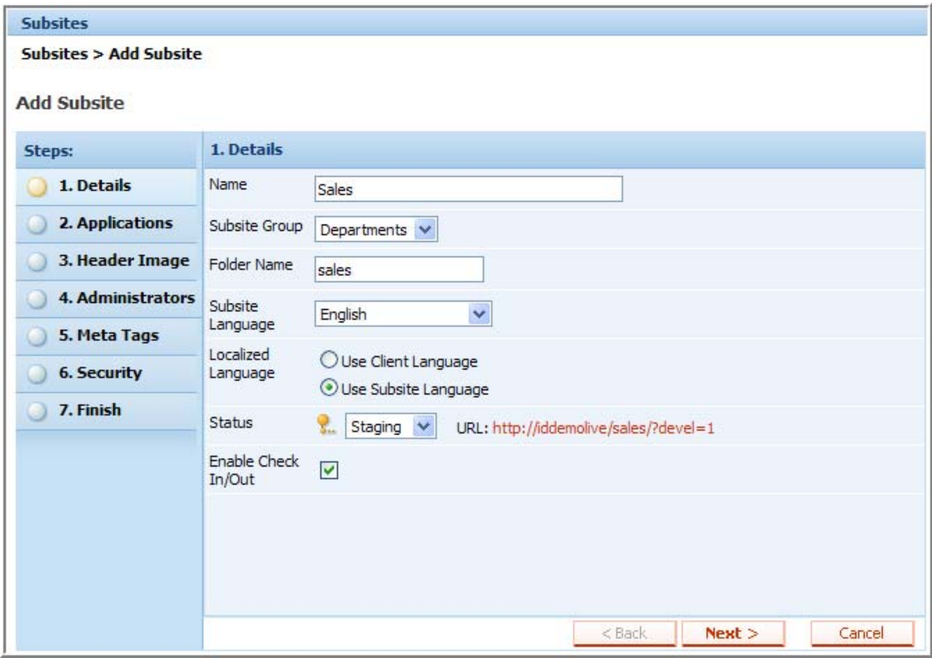
Select **English** as the Subsite Language unless your intranet has Language Localization established (see **http://support.intranetdashboard.com/home/guides/localization.html** for further information)

It is recommended to leave the Subsite status as 'Staging' until the configuration of the Subsite is complete. A Subsite can be assigned one of three statuses:

- **Inactive**: The site is not visible at the front end
- **Staging**: The site is assigned a staging address for front end viewing; however the site is not integrated with the rest of the intranet
- **Active**: The site is fully viewable at the front end and is integrated with the rest of the intranet

Check the **Enable Check In/Out** box if you would like you administrators to lock content from being edited by other administrators (further information on this feature is covered later in this guide)

Click **Next** to continue.



Step 3: Select the applications you wish this subsite to have access to and click **Next** to continue.

Step 4: Edit the text that you would like to appear in the Site Header section of the subsite. Click **Next** to continue.

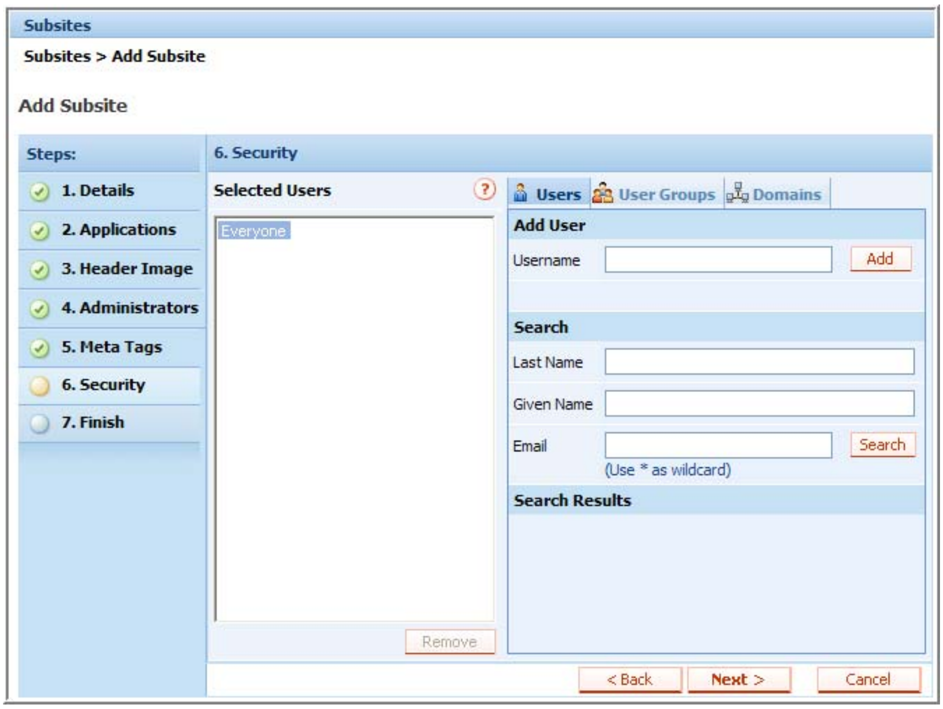
Step 5: Tick the checkbox that corresponds to the Superuser if you wish them to be the site administrator (the owner and the contact person) for this subsite. Alternatively you may select another user to be subsite administrator later when they are added to the system. Click **Next** to continue.

Step 6: Enter Meta Tags if they are set up.

Note: The **Intranet DASHBOARD** Search engine does not require these Meta Tags to be entered.

Click **Next** to continue.

Step 7: If required, use the **Security** screen to modify which intranet website users you would like to be able to access this folder. As the default, access shall be available to all users.



Step 8: Check the details are correct, click **Back** to make any changes or **Finish** to save.

1.1.6. Subsites - Applying a layout

When a subsite is created it is automatically assigned a layout based upon the default template. However, you can create a layout based upon the template created earlier.

Step 1: You must allow the new subsite created to have access to the template created earlier. To this you must select your **Subsite (e.g. Sales) > Layout Manager > Advanced > Edit Template**.

Step 2: Select the template you want to make available to the site. Click **Next** to continue.

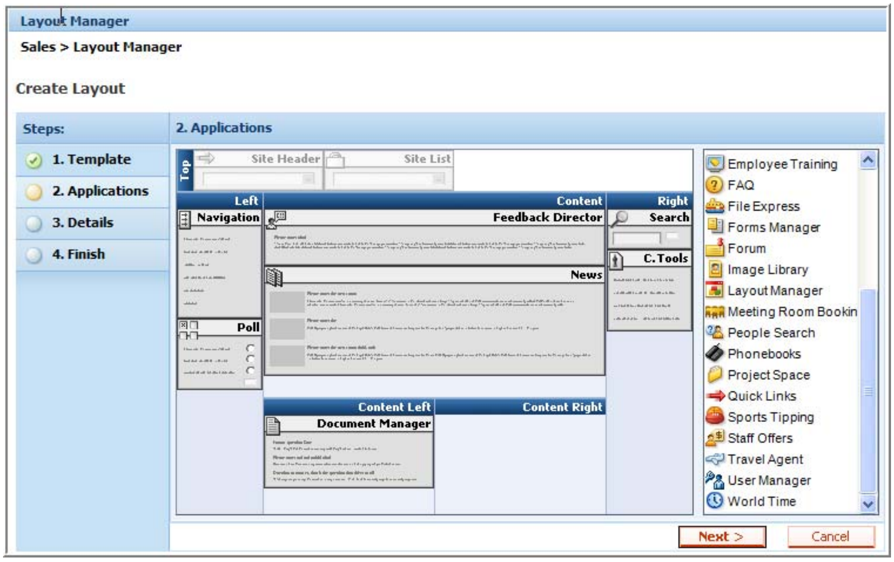
Step 3: Check the checkbox beside the subsite you created. Click **Next** to continue.

Step 4: Click **Finish** to save the changes you have made.

Step 5: Go to the **Subsite (e.g. Sales) > Layout Manager > Create Layout**.

Step 6: Select a template.

Step 7: Organize the layout according to how you would like it. Click **Next** to continue.



Step 8: Select the checkbox to allow the subsite to be active.

Step 9: Click **Finish** to save these changes.

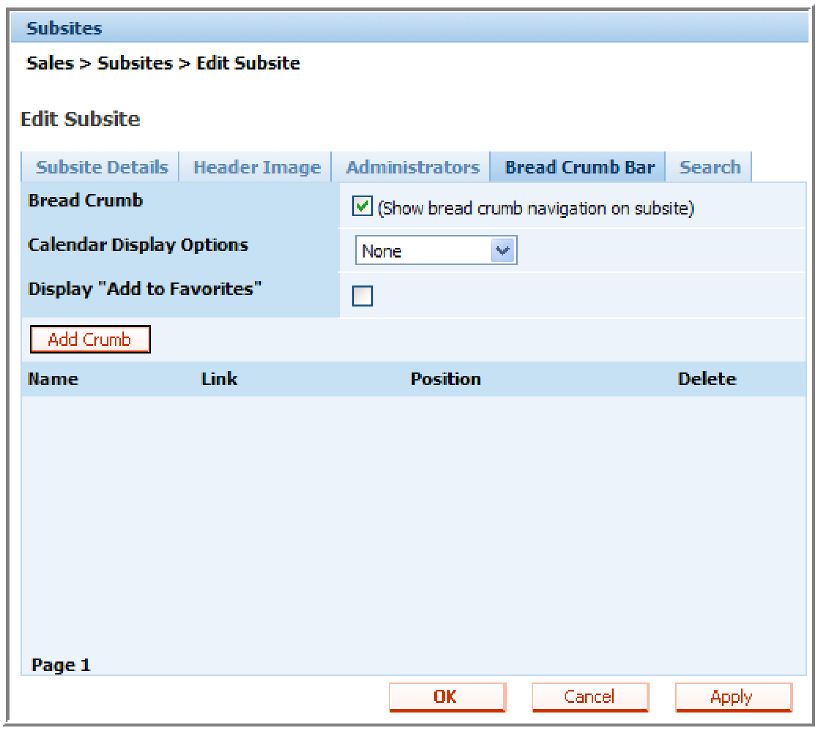
1.1.7. Subsites – Enabling Breadcrumbs

Enabling breadcrumbs allows a front end user to see where they are in a subsite's hierarchy.

Step 1: Select **Subsite Admin > Edit Subsite** from the **Application Explorer** menu in the Subsite that you wish to enable breadcrumbs (e.g. Sales)

Step 2: Select the **Bread Crumb Bar** tab screen

Step 3: Check the checkbox to display breadcrumbs



Step 4: Click **Apply** to save while remaining on the current page to make additional changes. Click **OK** to save.

1.1.8. Adding the subsite to the homesite navigation

The Nav Editor application allows a user to add, remove and reorder navigation items that appear on the intranet.

First ensure that the **Nav Editor** is part of the layout of the site you want to add the nav item to. Secondly, check whether there is an existing **Nav Bar** created for the home site. Multiple **Nav Bars** can be created for each site although only one **Vertical Nav Bar** and one **Horizontal Nav Bar** can be visible on each site.

1.1.8.1. Adding a Nav Item to a new Nav Bar

If there is no existing **Nav Bar** or a new **Nav Bar** is required:

Step 1: Select **Add Nav Bar** from the **Nav Editor** menu in the homesite (or a subsite) in Admin.

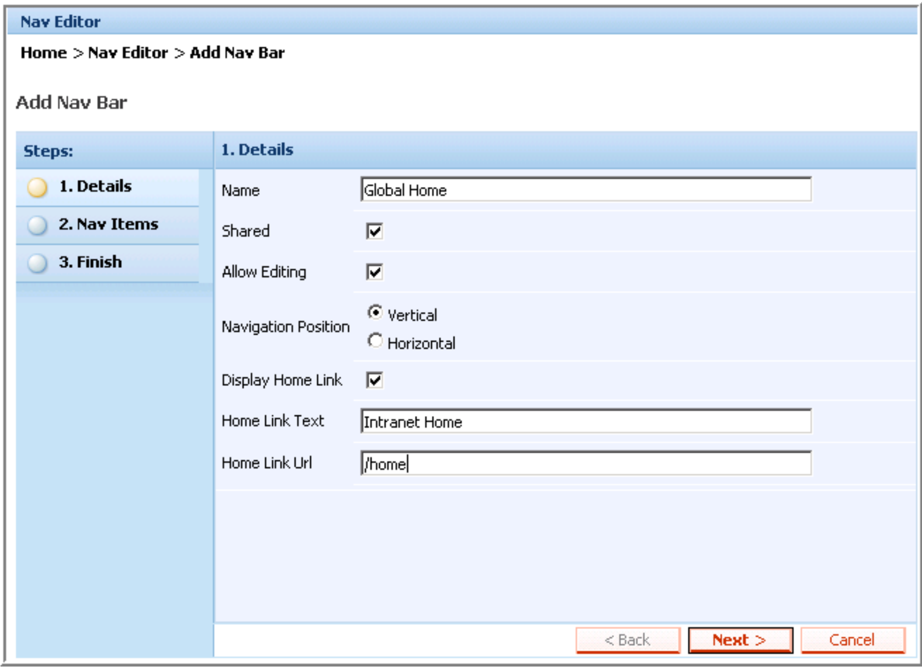
Step 2: Enter a **Name** for the **Nav Bar**.

Step 3: Check the **Shared** check box if you would like this **Nav Bar** to be used on other sites.

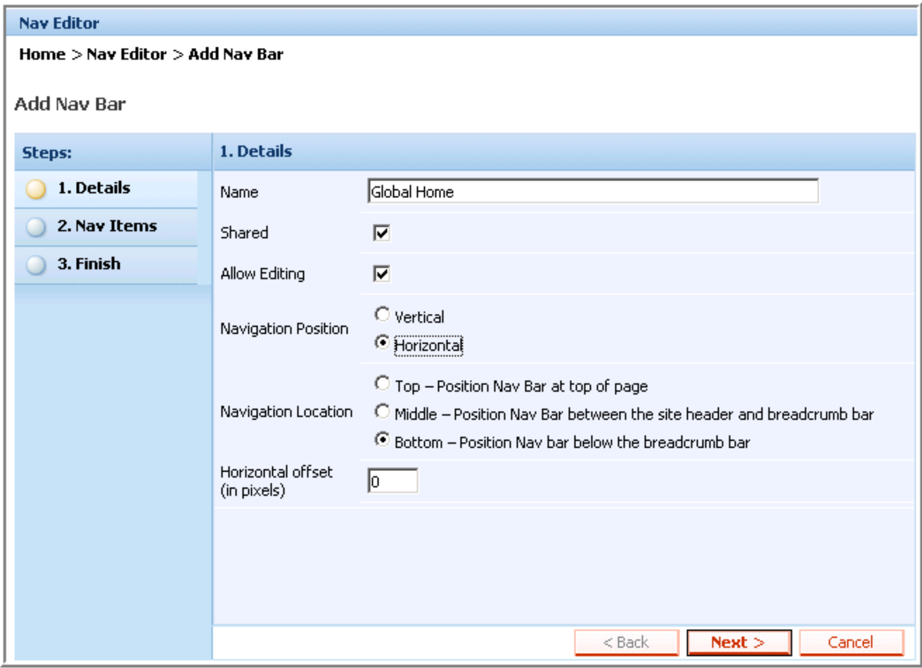
Step 4: Check the **Allow Editing** check box if you would like this **Nav Bar** to be editable from other sites.

Step 5: Select whether this **Nav Bar** will be appear **vertically** down the side of the site (usually the left hand side) or **horizontally** across the top of the site

- If a **Vertical Nav Bar** is selected, choose whether to **Display Home Link**. This means that a default 'home' header will be displayed at the top of the **Nav Bar**. You can also choose to define the **Home Link Text** and the **Home Link Url**



- If a **Horizontal Nav Bar** is selected, choose whether it appears at the top of the page, between the site header and the breadcrumb bar, or below the breadcrumb bar. You can also enter a **Horizontal offset (in pixels)**; this indents the horizontal **Nav Bar** from the left hand side by the number of pixels entered.



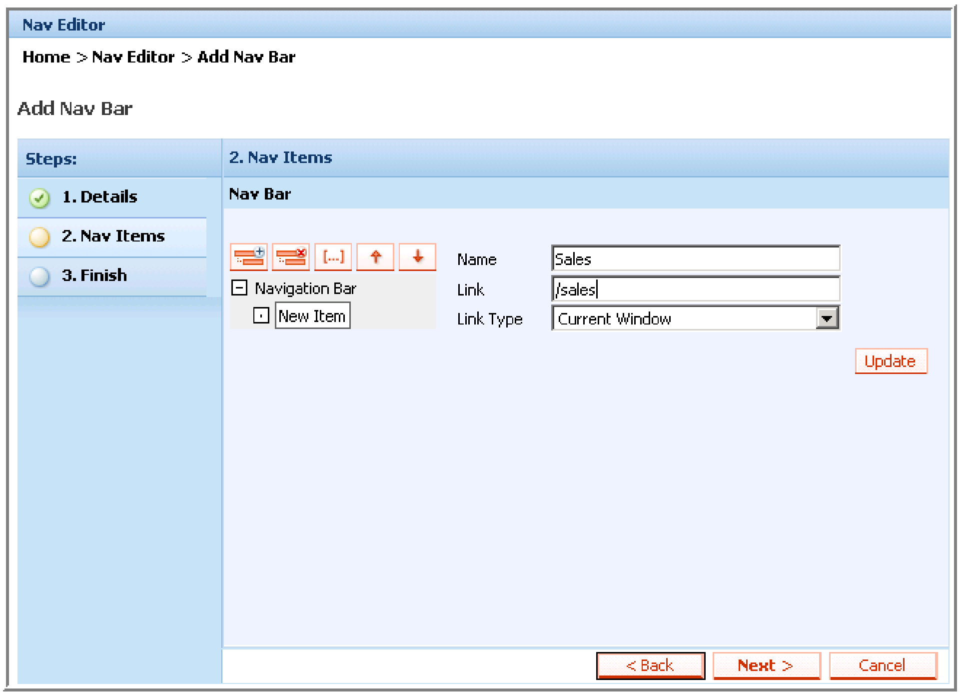
Step 6: Click **Next** to continue

Step 7: Click the  button to **Add** a new navigation node

Step 8: Enter the following Properties:

- **Name** – The Name that will appear in the navigation
- **Link** – The Link to follow when the navigation item is clicked.

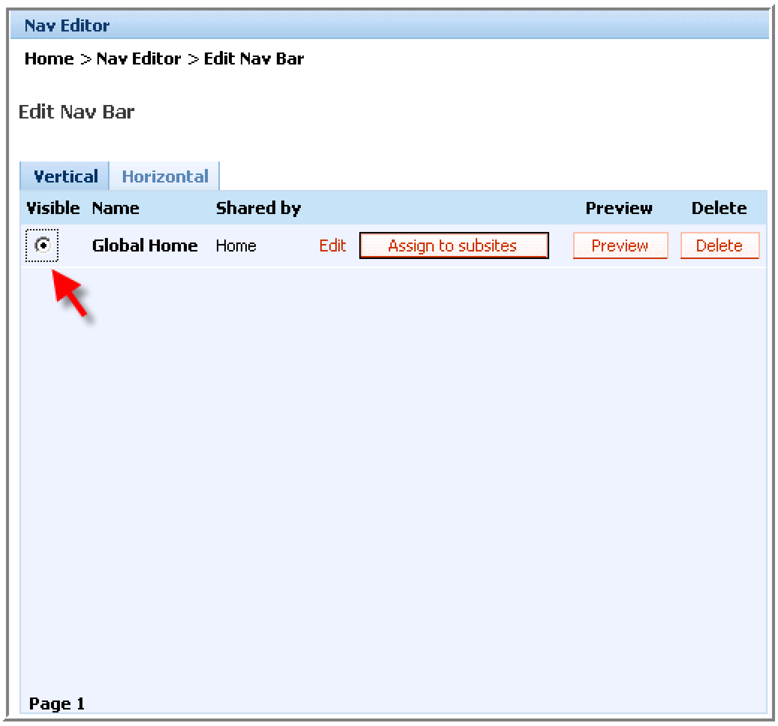
  Note: When linking internally within the intranet the full URL is not required. Instead a relative link without the domain name of the intranet at the front can be entered. **E.g.** The full URL of the sales site created earlier is **http://yourintranet/sales**; however you can simply enter **/sales** to in the navigation link to create the link.
- **Link Type** – The way in which the link should open. Usually Current Window is selected from internal links and Blank Window for links that are external to the intranet.



Step 9: Click **Update** to save the changes for the individual **Nav Item**. You can continue to add **Nav Items** to the **Nav Bar**. Once you have finished adding **Nav Items** click **Next** to continue.

Step 10: Click **Finish** to save the **Nav Bar**.

Step 11: On the displayed **Edit Nav Bar** screen, ensure that the **Visible** radio button is selected for the **Nav Bar** that is to display on the site



1.1.8.2. Adding a Nav Item to an existing Nav Bar

If there is an existing **Nav Bar**:

Step 1: Select **Edit Nav Bar** from the **Nav Editor** menu in the homesite (or a subsite) in Admin.

Step 2: Click **Edit** next to the **Nav Bar** that you wish to edit.

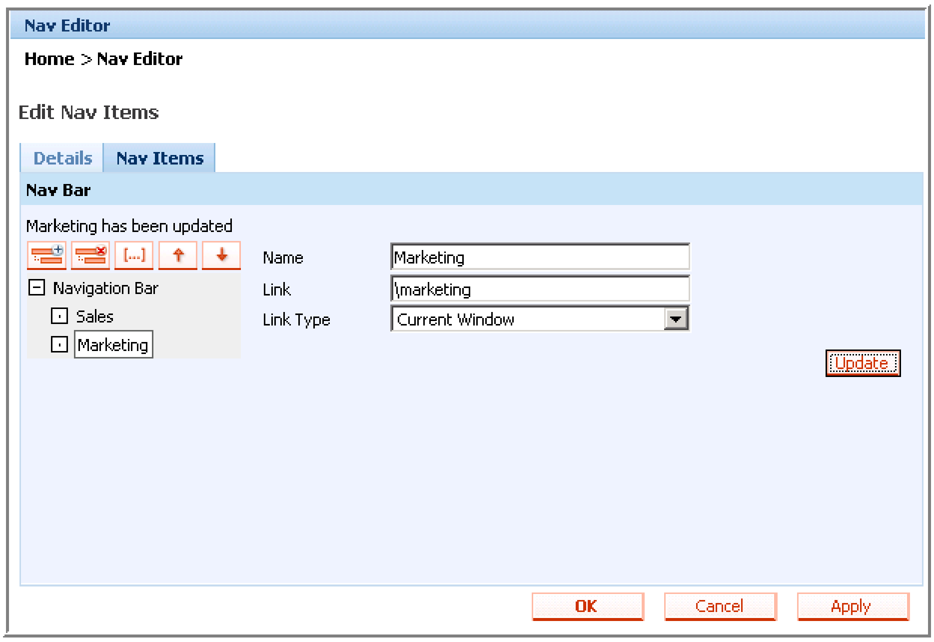
Step 3: Select the **Nav Items** tab

Step 4: Click the button to **Add** a new navigation node

Step 5: Enter the following Properties:

- **Name** – The Name that will appear in the navigation
- **Link** – The Link to follow when the navigation item is clicked.

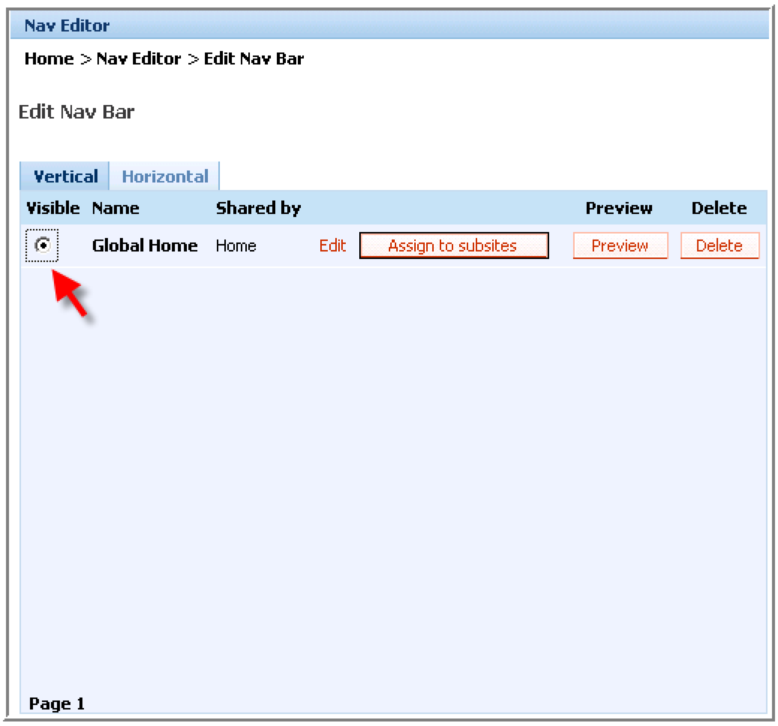
  Note: When linking internally within the intranet the full URL is not required. Instead a relative link without the domain name of the intranet at the front can be entered. **E.g.** The full URL of the sales site created earlier is **http://yourintranet/sales**; however you can simply enter **/sales** to in the navigation link to create the link.
- **Link Type** – The way in which the link should open. Usually Current Window is selected from internal links and Blank Window for links that are external to the intranet.



Step 6: Click **Update** to save the changes for the individual **Nav Item**. You can continue to add **Nav Items** to the **Nav Bar**. Once you have finished adding **Nav Items** click **Apply** to save the changes to the **Nav Bar**.

Step 7: Click **OK**

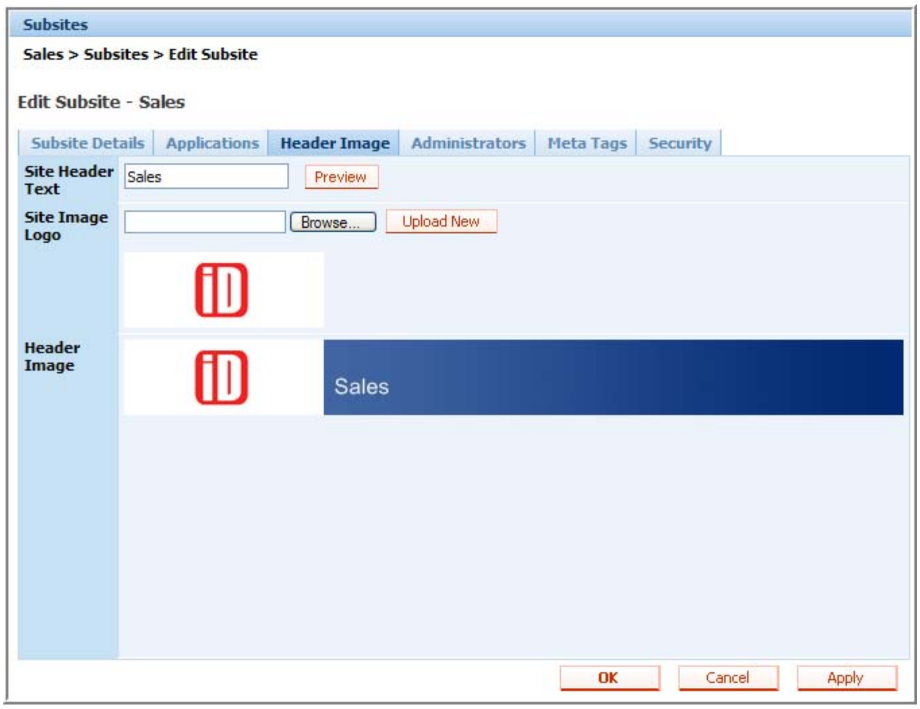
Step 8: On the displayed **Edit Nav Bar** screen, ensure that the **Visible** radio button is selected for the **Nav Bar** that is to display on the site



1.1.9. Changing site logo

Step 1: Select **Administration > Subsites > Edit Subsite**. Click on **Edit** for the subsite you want to change the logo for.

Step 2: Select the Header Image tab.



Step 3: Click on **Browse** and select the new image you want to download. Dimensions should be 148 x 56 px but will resize within reason.

Step 4: Click on the **Upload New** button.

Step 5: Click on **Preview** to view the new image on the site header.

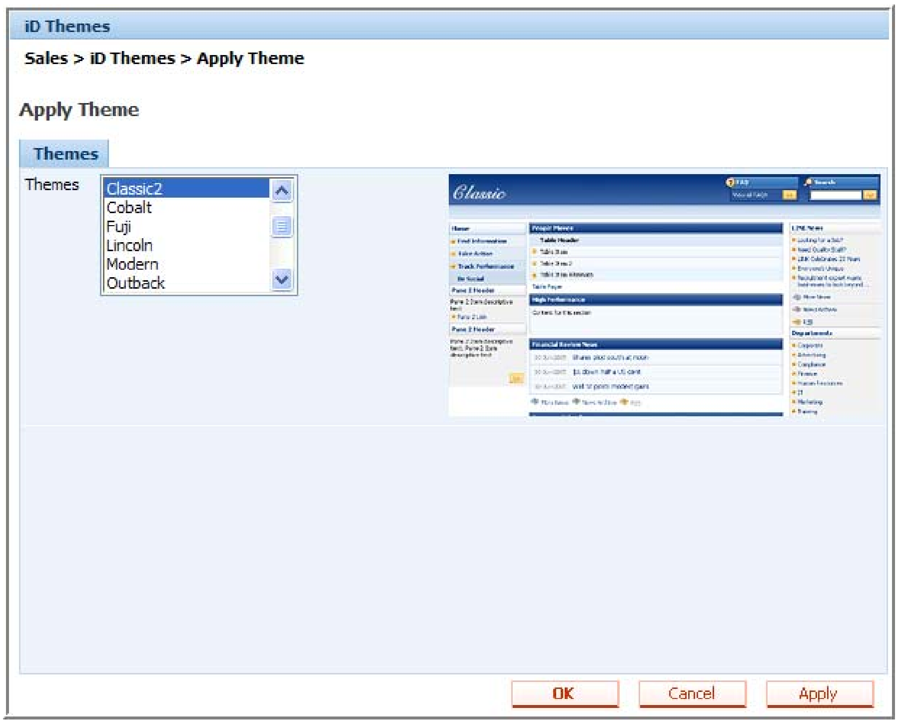
Step 6: Click **OK**.

1.1.10. Changing the look and feel (iD Themes)

Step 1: Select **Apply Theme** from the **iD Themes** menu in the subsite that you wish to change.

Step 2: Select one of the pre-defined themes from the list box. A preview thumbnail is included on the right to give you an indication of what the front end will look like when the theme is loaded.

Step 3: Click the **Apply** button to apply the theme to the subsite you are currently in. (Please Note: All changes you had previously made to any other theme will be overwritten)



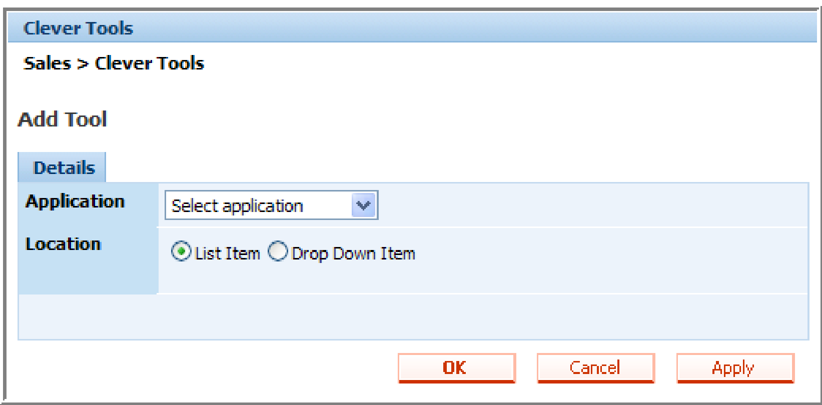
Step 4: Open a new browser window and navigate to the homepage of the subsite you have modified. The new theme should be applied. You may need to refresh the page.

1.1.11. Enabling Clever Tools

The Clever Tools list allows you to provide access to applications that you have not included in the layout of a subsite. Before the Clever Tools list can be built please ensure that the Clever Tools application has been included in your layout.

Step 1: Select **Add Tool** from the **Clever Tools** menu in your subsite.

Step 2: Select the Application that you wish to make available and whether you would prefer it to appear as a **List Item** or a **Drop Down Item**



Step 3: Click **Apply** to save while remaining on the current page to add more items. Click **OK** to save.

Step 4: Open a new browser window and navigate to the homepage of the subsite you have modified. The clever tool selected should appear in the **Clever Tools** list

2. Content Management/Publishing Tools

Below are instructions on the major functions of the main tools used to managing and publishing content.

2.1. Document Management

2.1.1. Adding a folder

The following steps will guide you through adding a new folder to the Document Manager. You can make this folder accessible to all users of the intranet website, or can select only certain users that may access the folder.

Step 1: Select **Manage Documents** from the **Document Manager** menu in your subsite

Step 2: Click on the button to create a new folder.

Step 3: Enter the **Name**, **Folder Name** and optional **Description** for the folder, and tick the **Active** box if you would like the folder to become available to users now.

Step 4: Click **Next** to continue.

Step 5: The **Security** screen is displayed. If required, modify which intranet website users you would like to be able to access this folder. As the default, access shall be available to all users.

Step 6: Click **Next** to continue.

Step 7: The **Permissions** screen is displayed. If required, modify which admin users should be allowed to amend this folder.

Step 8: Check that the details are correct. Click on the **Back** button to make changes to previous pages.

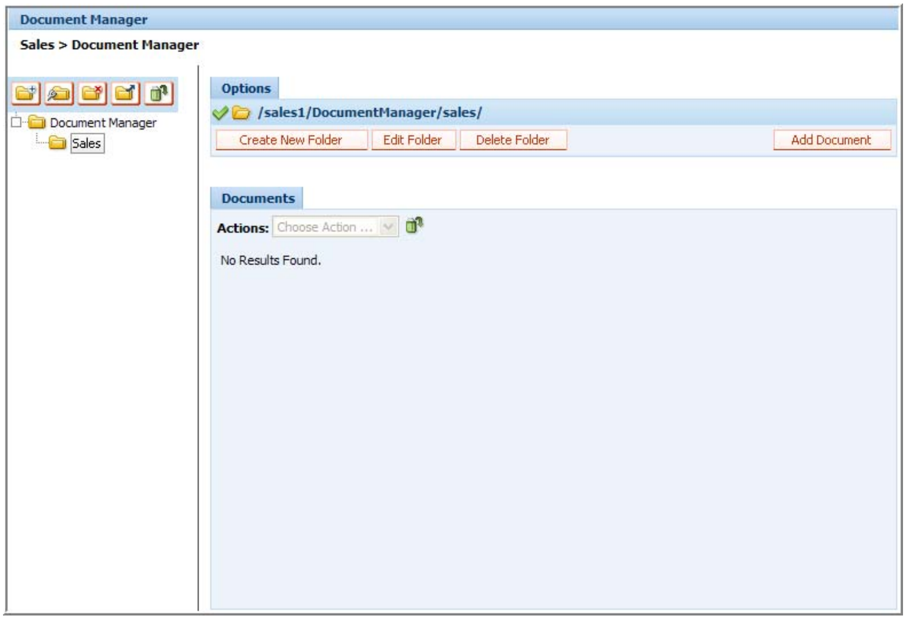
Step 9: Click **Finish** to save.

2.1.2. Adding a document

The following steps will guide you through adding a new document. You must add a folder before you can add a document.

Step 1: Select **Manage Documents** from the **Document Manager** menu in your subsite

Step 2: Use the folder list to navigate to the folder you would like to add a document to.



Step 3: Click on **Add Document**.

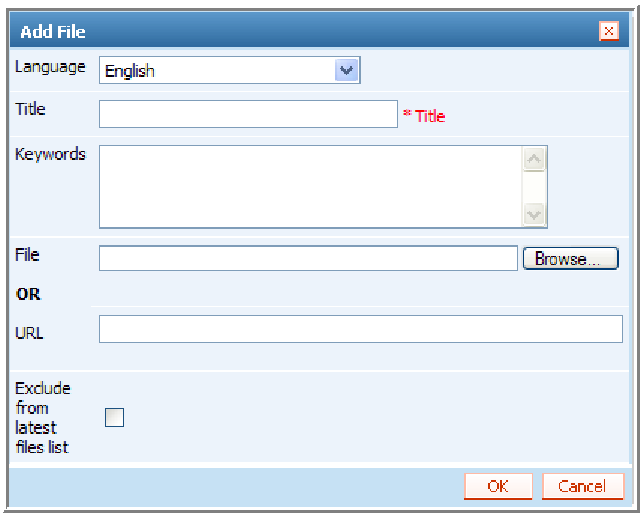
Step 4: Enter a **Title, URL Path, Description** and **Keywords** for the document

You can also choose when the document becomes visible, when it expires and if you wish to be notified before it expires. By default the document is immediately visible and does not expire.

Step 5: Tick the boxes corresponding to the folder(s) you would like to add the file to.

Step 6: Click **Next** to continue.

Step 7: Click on **Add Document**. Select the **Language** of the document, enter the **Title, Keywords** and either click **Browse** and locate the document, or enter a website address. Click **OK**.



Step 8: Repeat this process to add the document in other languages.

Step 9: Click **Next** to continue.

Step 10: Enter any **Additional Information** for the document on the **More Info** screen.

Step 11: Click **Next** to continue.

Step 12: If required, attach links to other documents using the **Add Bibliography** option

Step 13: Check that the details are correct. Click on the **Back** button to make changes to previous pages.

Step 14: Click **Finish** to save.

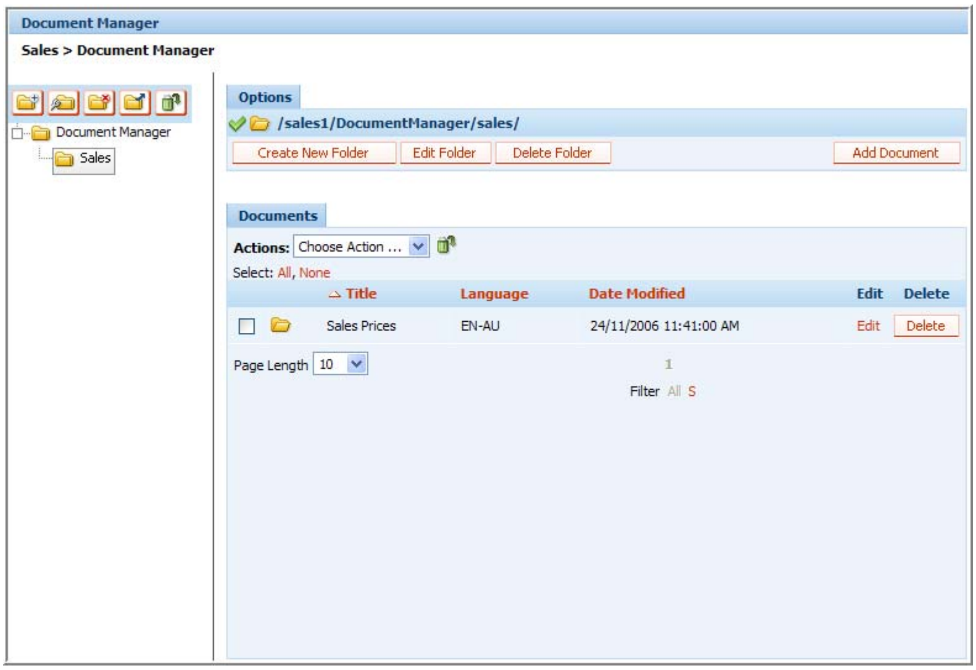
2.1.3. Version Control - Editing a Document

When an update is made to a document through the Document Manager application a copy of the previous version is maintained by the system.

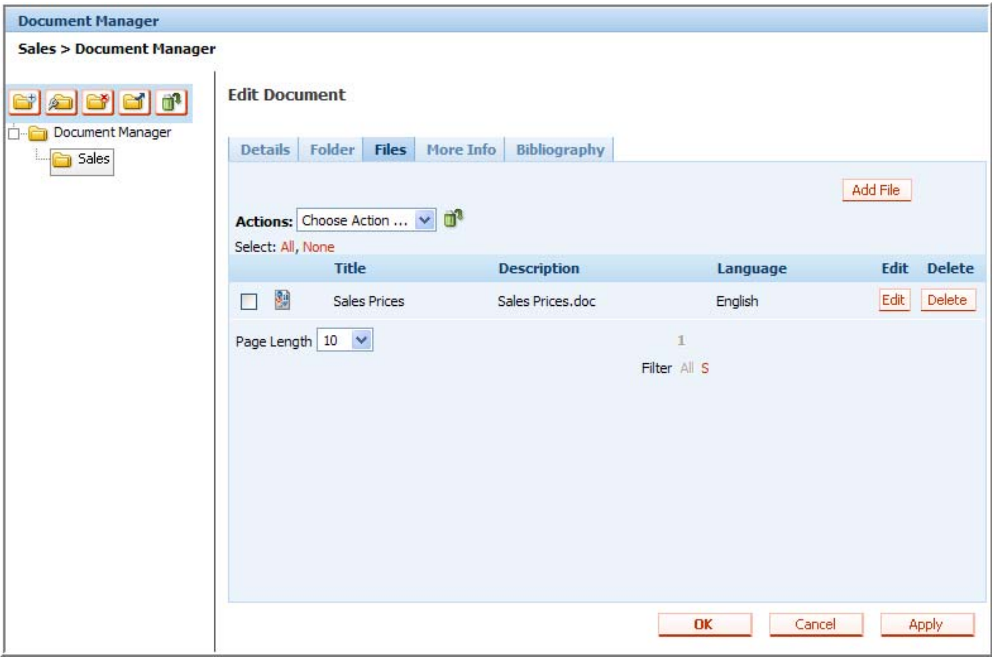
Step 1: Select **Manage Documents** from the **Document Manager** menu for your site.

Step 2: Use the folder list to navigate to the folder in which you have previously added a document

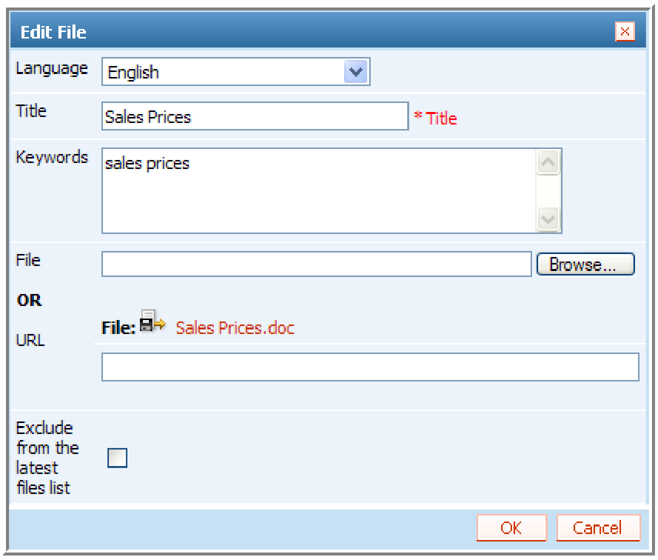
Step 3: Click the **Edit** link for the document to be edited



Step 4: Select the **Files** tab screen



Step 5: Click the **Edit** button



Step 6: Click the **Browse** button on **Edit File** screen, select the updated file

Step 7: Click **OK** to upload the updated file

Step 8: Click **OK** on the **Files** tab screen to save the change and return to the folder view

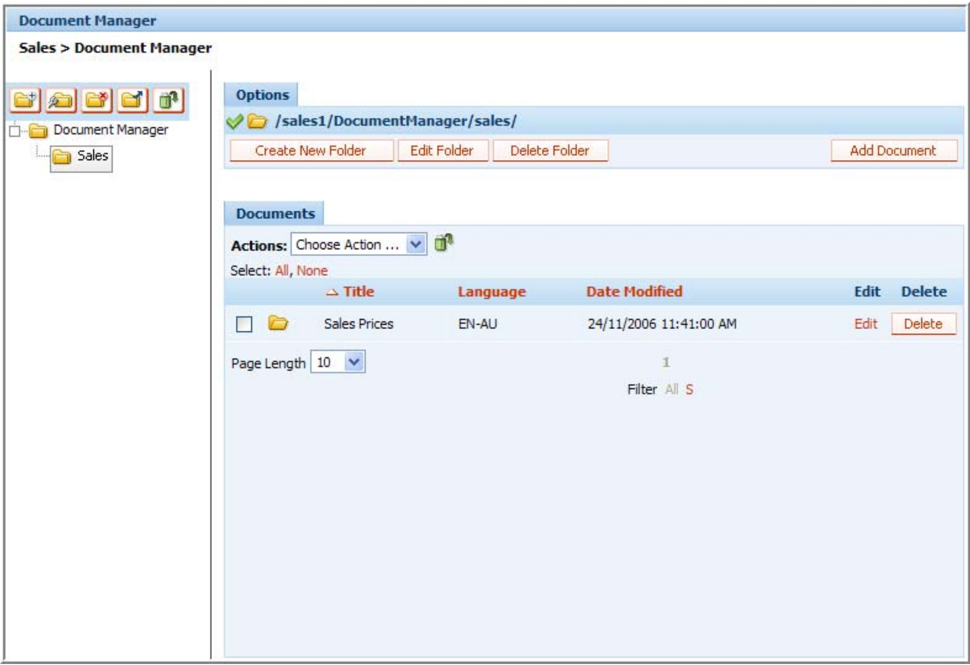
2.1.4. Version Control - Rolling back to a Previous Version of a document

When a document has been updated, previous versions of the document are retained. You can choose to rollback to a previous version of the document if required.

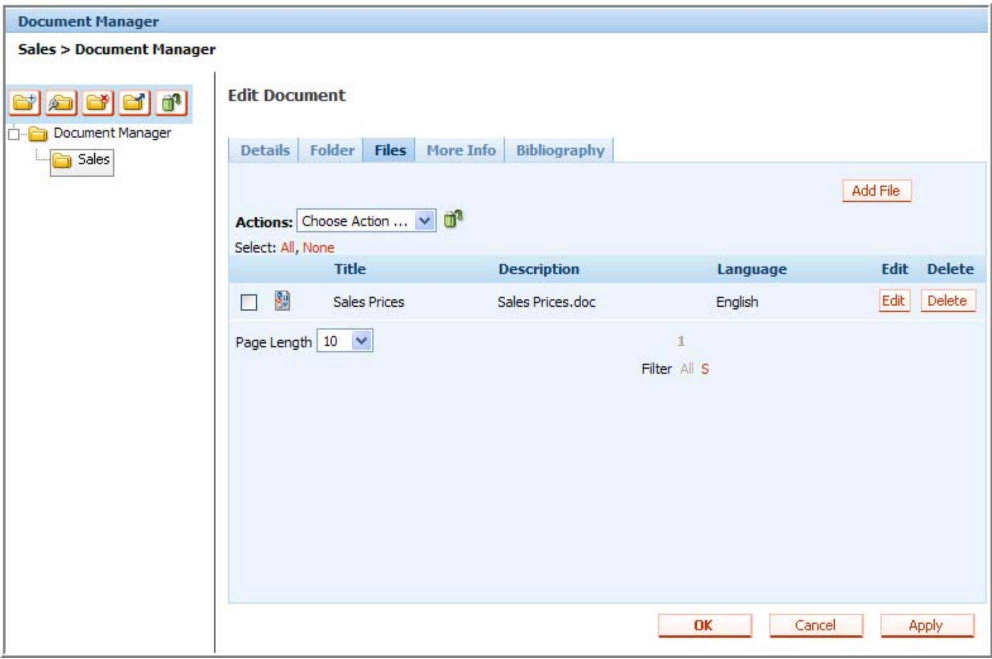
Step 1: Select **Manage Documents** from the **Document Manager** menu for your site.

Step 2: Use the folder list to navigate to the folder in which you have previously added a document

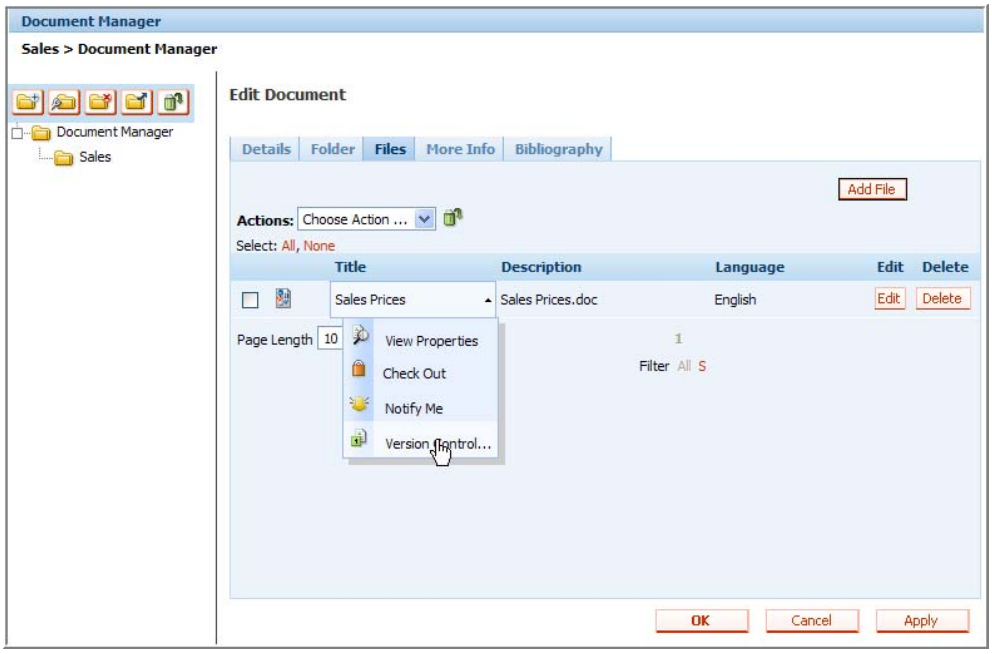
Step 3: Click the **Edit** link for the document to be edited



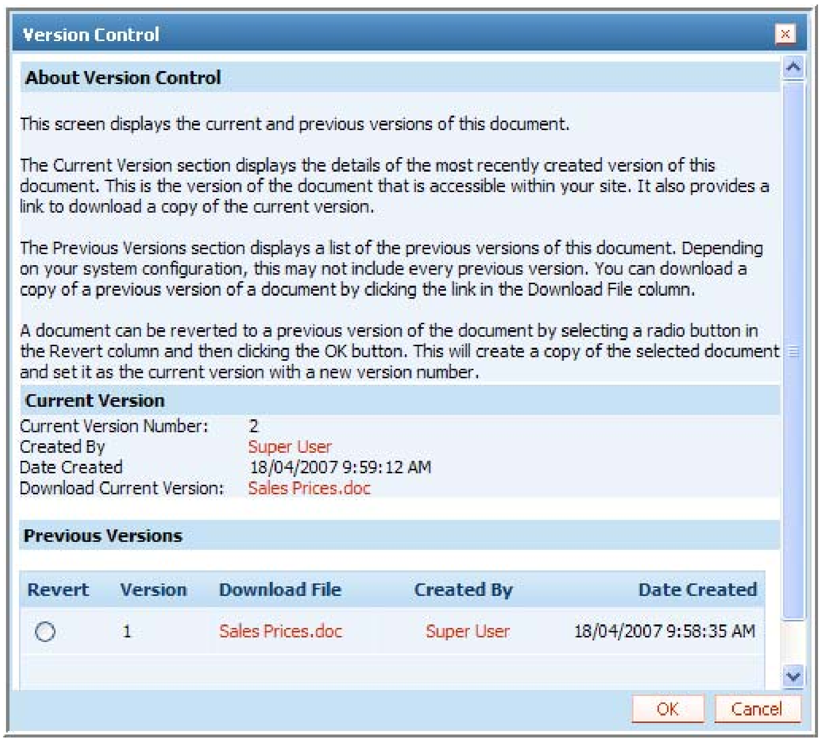
Step 4: Select the **Files** tab screen



Step 5: On the **Files** tab click on the title of the document. Select **Version Control** from the menu that drops down.



Step 6: On the **Version Control** screen select the previous version that you would like to rollback to and click **OK** e.g. Version 1

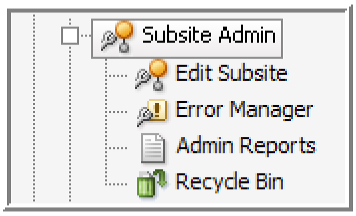


Step 7: The document will now have reverted to the previous version. The newer version that was rollback from will also be maintained as a version

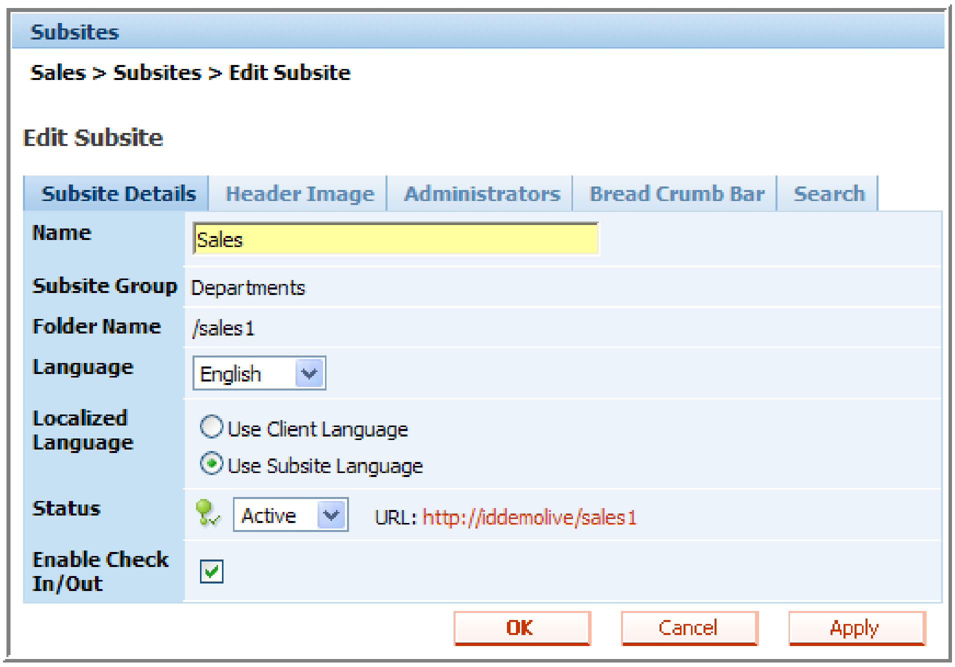
2.1.5. Check in/Check Out

If you are completing work on a document you can check the document out to ensure that other administrators/publishers in the system do not make changes to the document while you are in the process of making updates. Note: Check In/Out needs to be enabled at the subsite level when creating the subsite (see above).

Step 1: To check whether **Check In/Out** is enabled select **Edit Subsite** from the **Subsite Admin** menu for your site.



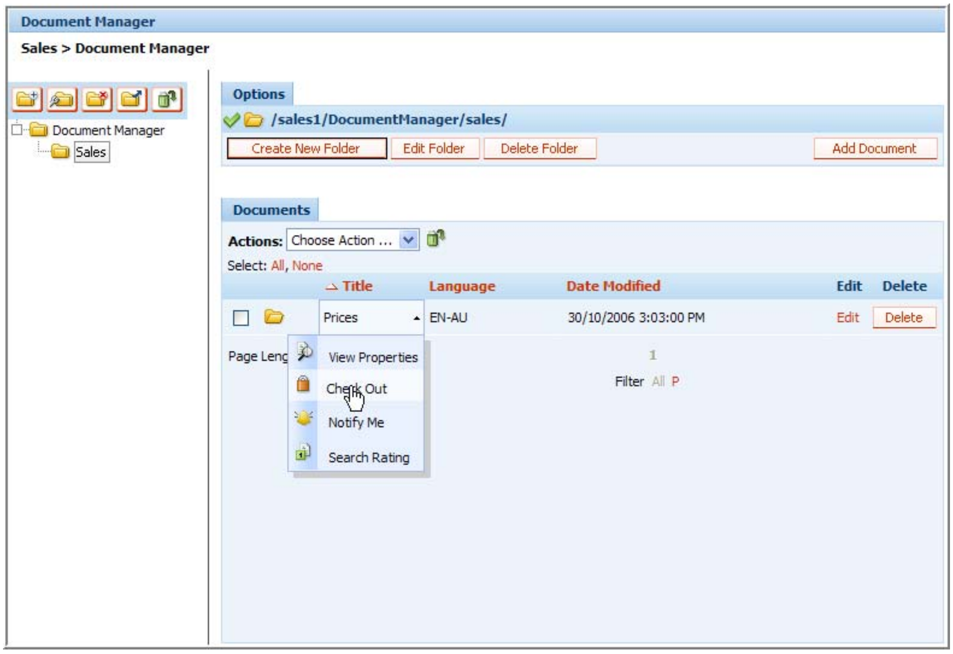
Step 2: Ensure that the **Enable Check In/Out** checkbox is checked. If not check it and click **OK**



Step 3: Select **Manage Documents** from the **Document Manager** menu for your site.

Step 4: Use the folder list to navigate to the folder in which you have previously uploaded the document

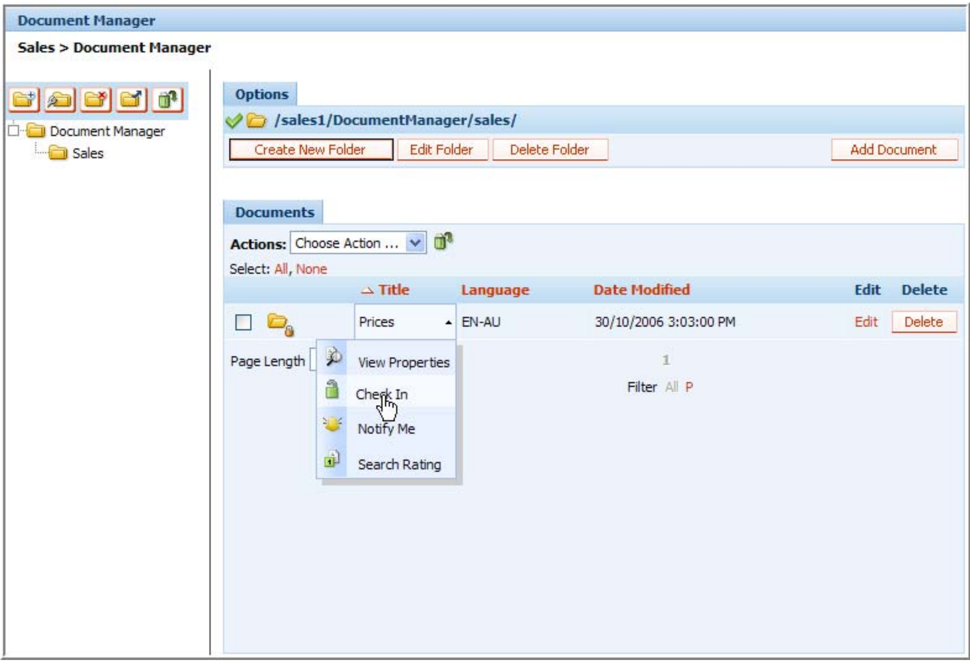
Step 5: In the Folder view click on the Filename of the document. Select **Check Out** from the menu that drops down.



Step 6: Click **OK** to the notification that appears

Step 7: The document will now display a padlock  in the State field to indicate that it is checked out. No other administrators/publishers will be able to upload a change to this document.

Step 8: Once you have finished uploading your changes you will need to check the document back in so that other administrators can make changes in the future. In the Folder view click on the Filename of the document. Select **Check In** from the menu that drops down.



Step 9: Click **OK** to the notification that appears.

Step 10: Other administrators/publishers can now upload changes to the document.

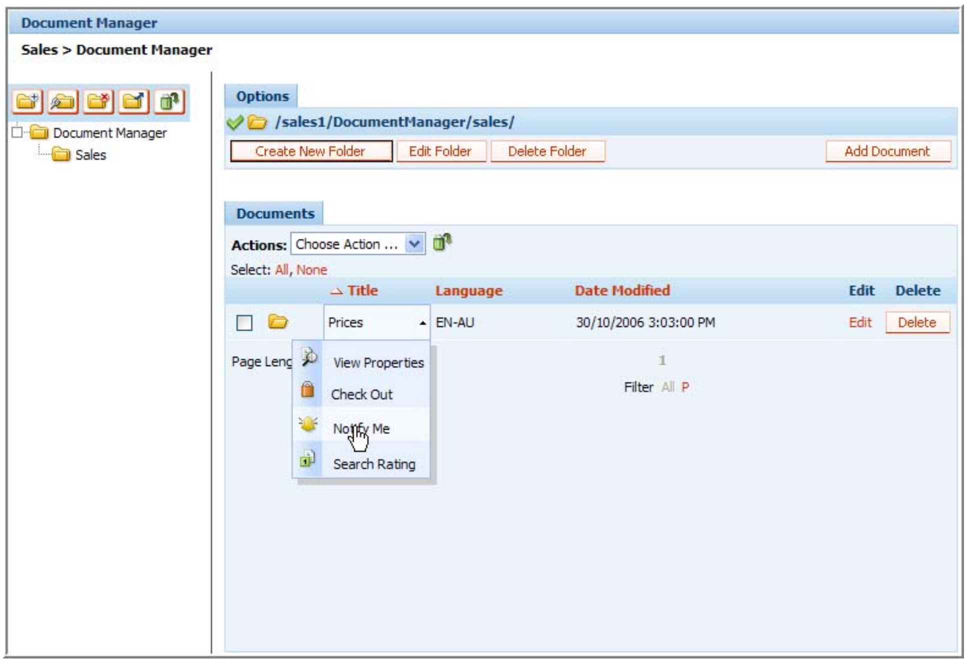
2.1.6. Document Notification

As an administrator/publisher you can choose to be notified when another administrator/publisher uploads a change to a document.

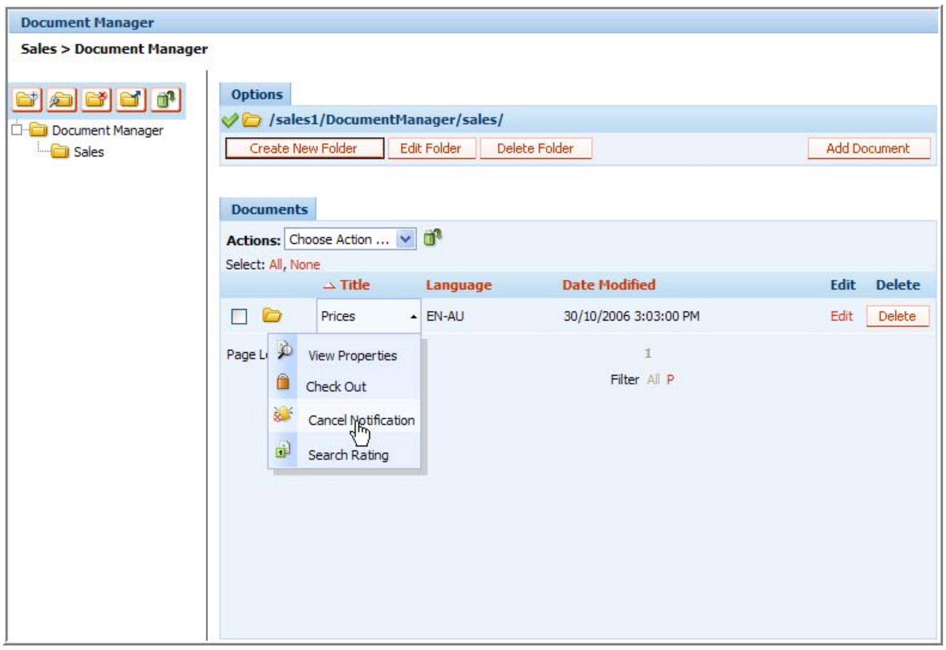
Step 1: Select **Manage Documents** from the **Document Manager** menu for your site.

Step 2: Use the folder list to navigate to the folder in which you have previously uploaded the document

Step 3: In the Folder view click on the title of the document. Select **Notify Me** from the menu that drops down.



Step 4: Click **OK** to the notification that appears. If another administrator/publisher uploads a change to this document you will be notified via email. You can cancel the notification at any time by clicking on the filename again and selecting **Cancel Notification.**



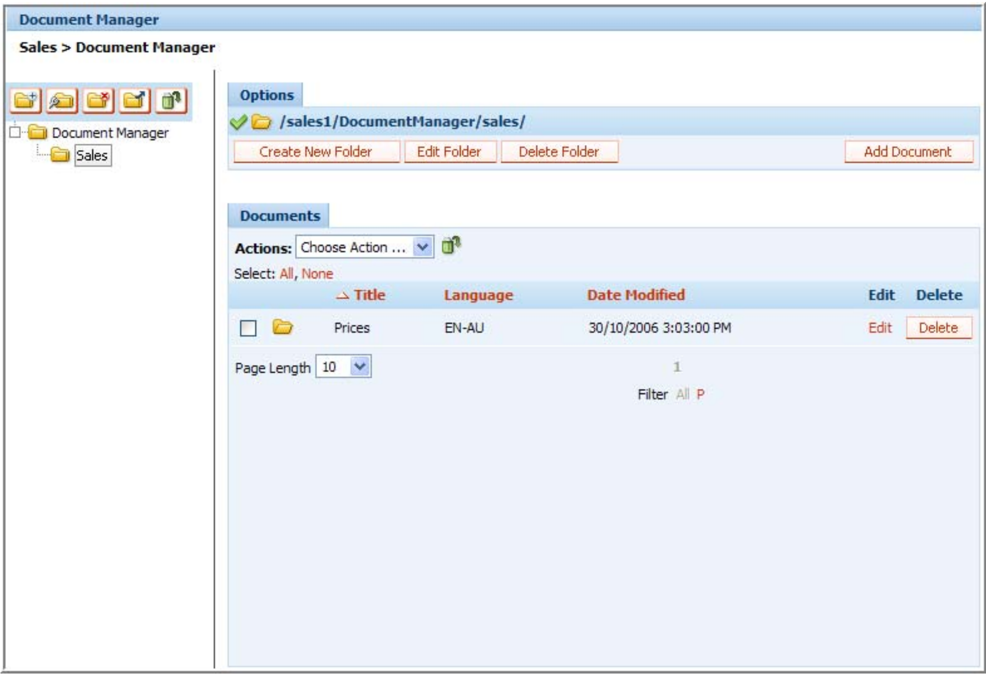
2.1.7. Document Expiry

When you upload or edit a document you can set when the document becomes visible and when it expires (by default it is visible immediately and never expires). You can also choose to be notified when the document is going to expire.

Step 1: Select **Manage Documents** from the **Document Manager** menu for your site.

Step 2: Use the folder list to navigate to the folder in which you have previously uploaded the document (document visibility and expiry dates can also be set when you are uploading a new document)

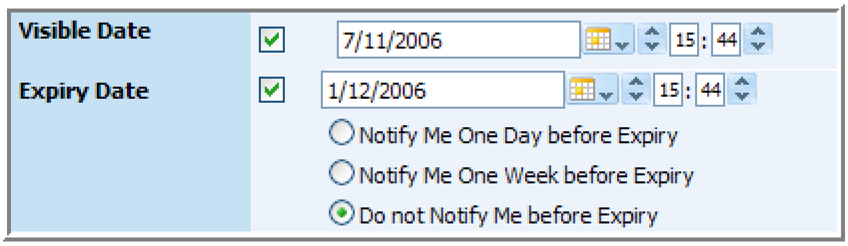
Step 3: Click the **Edit** link for the Document to be edited



Step 4: On the Details tab you can edit the Visible and Expiry dates.

If you do not wish the document to be visible immediately, check the **Visible Date** check box and set the date when the document will become visible.

If you wish to set an expiry date for the document, check the **Expiry Date** check box and set the expiry date. You can also choose to be notified that the document is going to expire ahead of time.

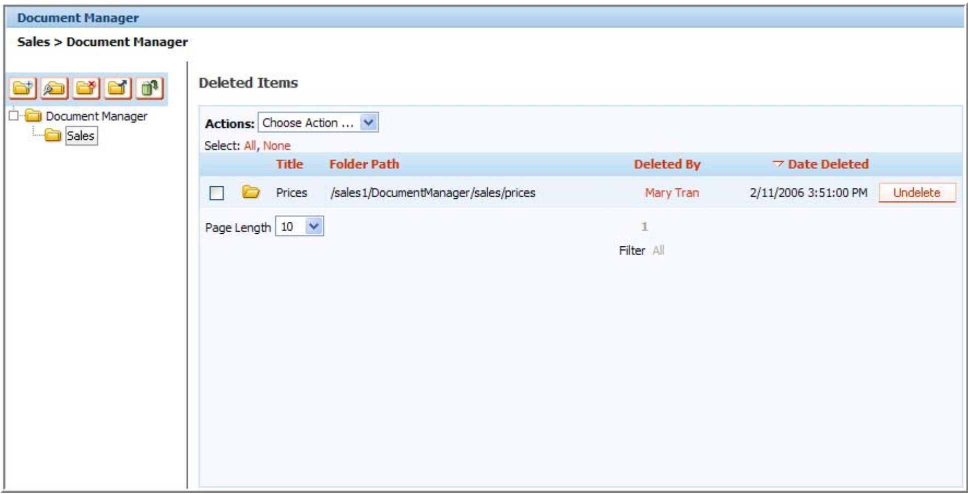


2.1.8. Undelete

When you delete a document it is sent to a recycle bin. You can choose to 'undelete' a document, thereby restoring it to its original location

Step 1: If you have deleted a document that you wish to restore, select **Manage Documents** from the the **Document Manager** menu for your site.

Step 2: Click the recycle bin icon to open the recycle bin for the Document Manager



Step 3: Click the **Undelete** button to restore the document to its original location

2.2. Content Publishing in iD

Publishing HTML content and downloadable documents is easy. All you need to do is upload Word documents.

2.2.1. Setting up folders, security and permissions

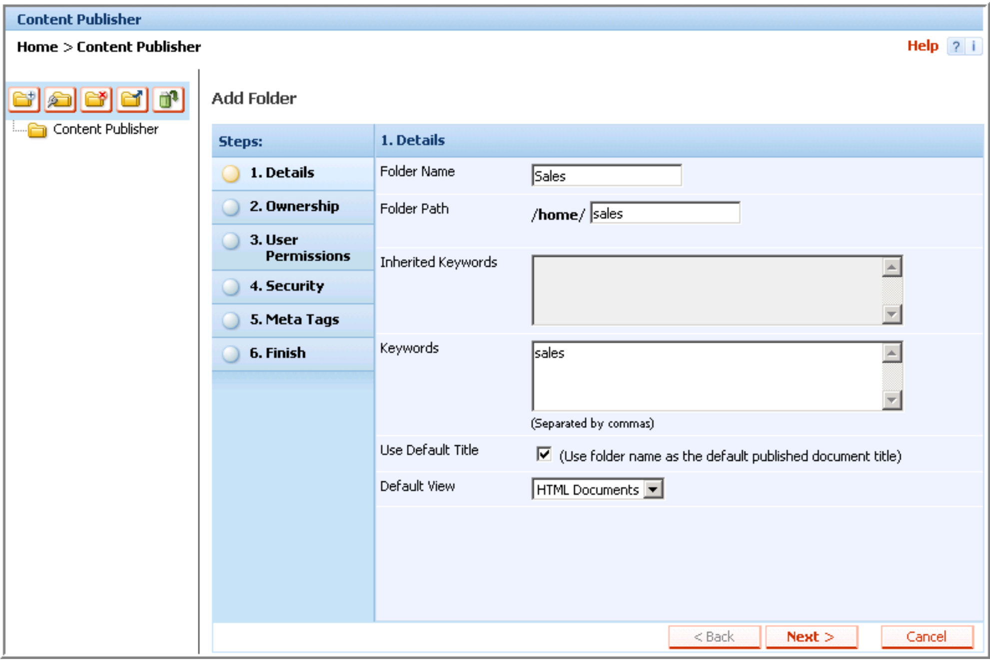
Content is categorized and controlled by folders and folder permissions. The following steps will guide you through adding a new folder into content publisher. You can select the type of users of the intranet you would like to be able to view content within the folder by clicking on the Security tab. By default, only Superusers and Subsite Administrators will be able to access and edit this folder. To make the folder accessible to other administration users, go to 'Editing an existing folder' after adding the folder. Click on the **User Permissions** tab to edit these details.

Step 1: Select **Content Management** from the **Content Publisher** menu for your subsite.

Step 2: Select the folder you would like to add the new folder into.

Step 3: Click on the  button to create a new folder.

Step 4: Enter the **Folder Name** and **Folder Path**, along with any other details you would like to set. Any keywords that you enter will be inherited by (passed on to) all folders and documents which are created in this folder. Keywords in the **Inherited Keywords** box are keywords from parent folders.



Step 5: Click **Next** to continue.

Step 6: The **Ownership** screen is displayed. If required, add a default owner for the pages that will be stored in this folder. If this is left blank, the owner field can be edited when a page is created.

Step 7: Click **Next** to continue.

Step 8: The **Permissions** screen is displayed. If required, modify which admin users should be allowed to amend this folder.

Step 9: Click **Next** to continue.

Step 10: The **Security** screen is displayed. If required, modify which intranet website users you would like to be able to access this folder. As the default, access shall be available to all users.

Step 11: Click **Next** to continue.

Step 12: The **Meta Tags** screen is displayed. Enter Meta Tags if they are set up.

Note: The **Intranet DASHBOARD** Search engine does not require these Meta Tags to be entered.

Step 13: Click **Next** to continue.

Step 14: Check that the details are correct. Click on the **Back** button to make changes to previous pages.

Step 15: Click **Finish** to save.

2.2.2. Publishing HTML content

Step 1: Select **Content Management** from the **Content Publisher** menu for your site.

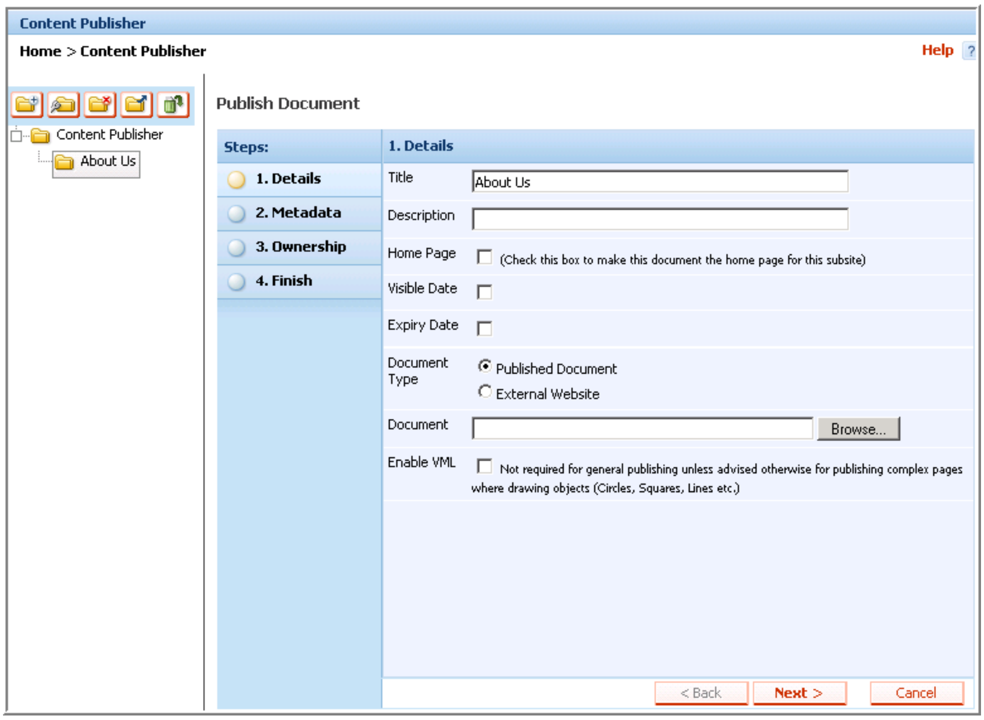
Step 2: Use the folder list to navigate to the folder in which you would like to publish the document.

Step 3: Click **Publish Document**.

Step 4: Enter the Document **Title**, **Description** and tick the **Home Page** checkbox if you wish the published document to be on the home page for the site. Note: in this situation content publisher must be on the site's homepage (see section on editing the layout). If you are publishing a stand-alone content page, you don’t need to tick the Home Page checkbox.

You can also choose when the document becomes visible, when it expires and if you wish to be notified before it expires. By default the document is immediately visible and does not expire.

Step 5: Click **Browse** and select the Word document you would like to publish.



Step 6: Click **Next** to continue.

Step 7: Enter the **Metadata** for the document. (The keywords you enter for the document allow users to search by these terms. The document will also inherit any keywords given to the folders it resides in.) The more accurate the metadata, the better the search results.

Step 8: Click **Next** to continue.

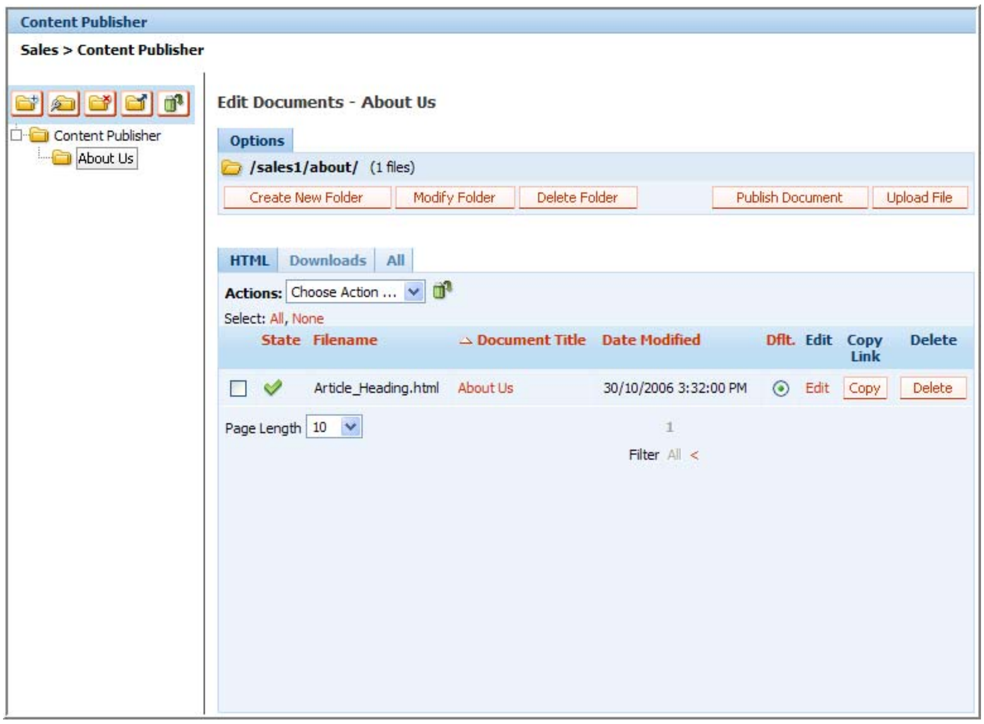
Step 9: On the **Ownership** screen enter the ownership details that should appear at the bottom of the page when it is viewed at the front end of the intranet.

Step 10: Click **Next** to continue.

Step 11: Check that the details are correct. Click on the Back button to make changes to previous pages.

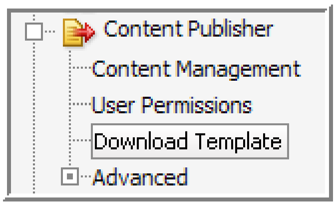
Step 12: Click **Finish** to create the webpage. You can choose to preview the page or publish it into a Staging environment so that another administrator can review the webpage before approving it.

Step 13: In the list of files, click on the **Copy Link** button corresponding to copy the link. You can then email this link to other users or use it elsewhere on the intranet to directly link to the new page.

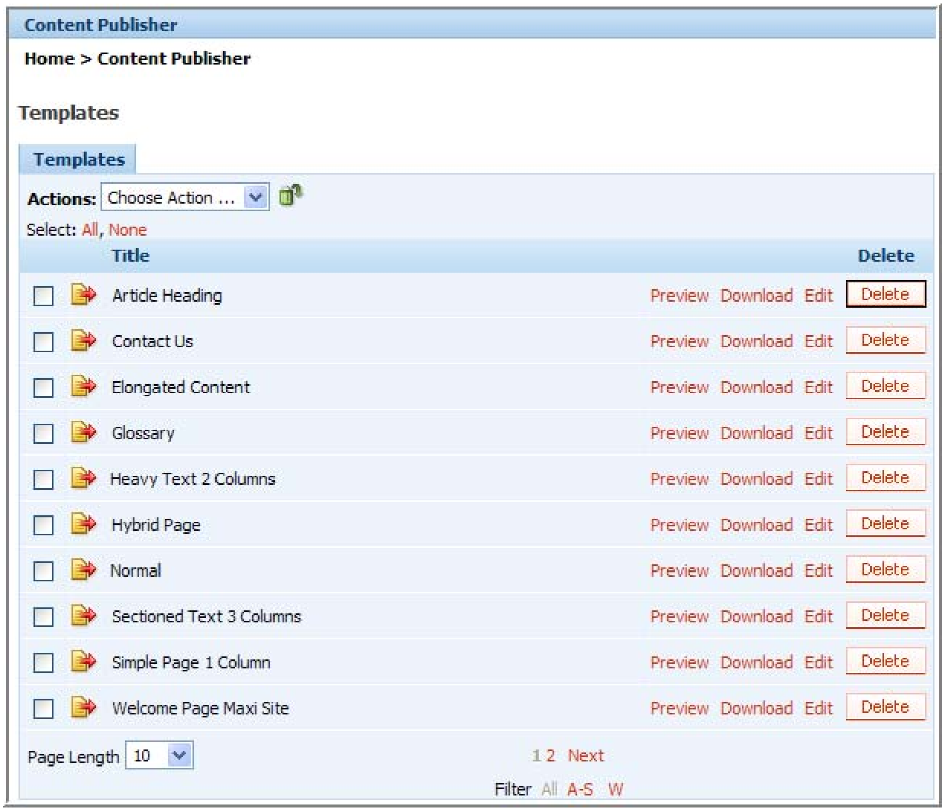


2.2.3. Using a template to publish content

Step 1: Select **Advanced** from the **Content Publisher** menu, then select **Download Template**.



Step 2: A list of word templates will be displayed. Click **Preview** to see what the template looks like



Step 3: Once you've chosen a template click **Download** to download a copy of the template as a Microsoft Word document

Step 4: The download template can then be used to create a page that will be published to the intranet as HTML (see **2.2.2. Publishing HTML Content**)

2.2.4. Uploading a file

The Upload File option in the Content Publisher application allows you to upload a file to the intranet so that it can be directly downloaded. As the file is given a direct URL it can be linked to from Content Published pages and other areas of the intranet.

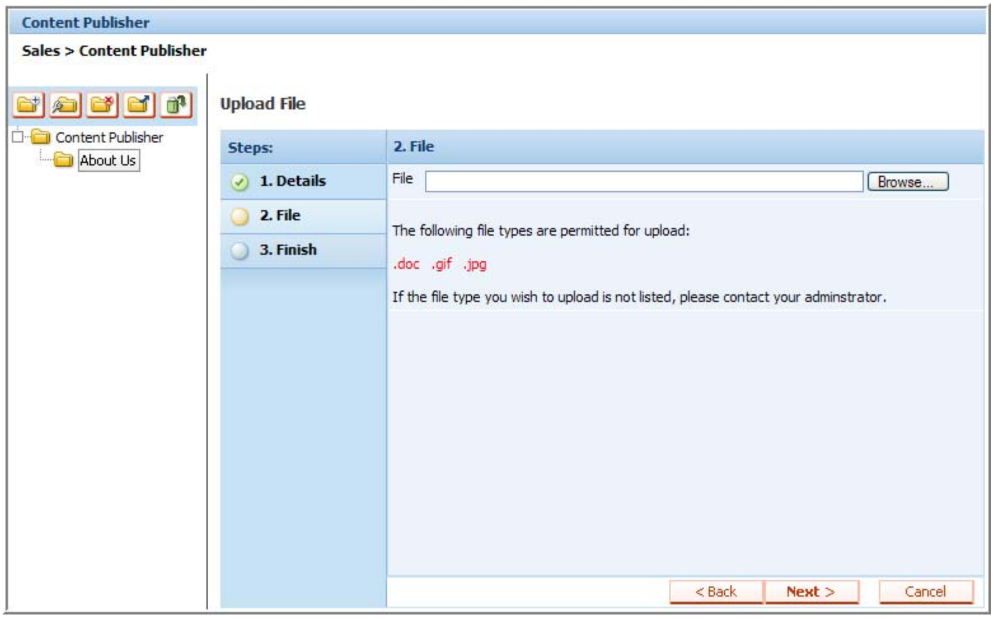
Step 1: Select **Content Management** from the **Content Publisher** menu for your site.

Step 2: Use the folder list to navigate to the folder in which you would like to upload the file

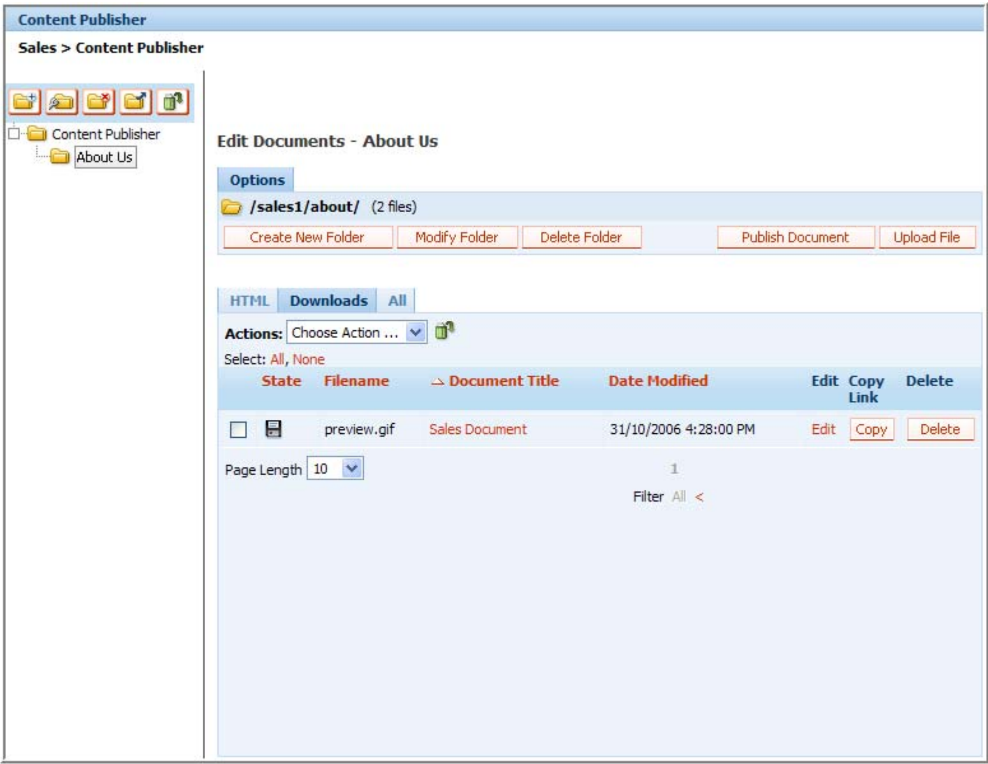
Step 3: Click **Upload File**

Step 4: Enter the File **Title**. You can also choose when the document becomes visible, when it expires and if you wish to be notified before it expires. By default the document is immediately visible and does not expire.

Step 5: Click **Browse** and select the file you would like to upload (Note: You are only permitted to upload file types that have been specified. To add extra file types select **Content Management > Advanced > Add File Type** from the **Content Publisher** menu for your site).



Step 6: Click **Finish** to create the upload the file. You will be returned to the Content Publisher folder view where you can see HTML published pages in the **HTML** tab and uploaded files in the **Downloads** tab.



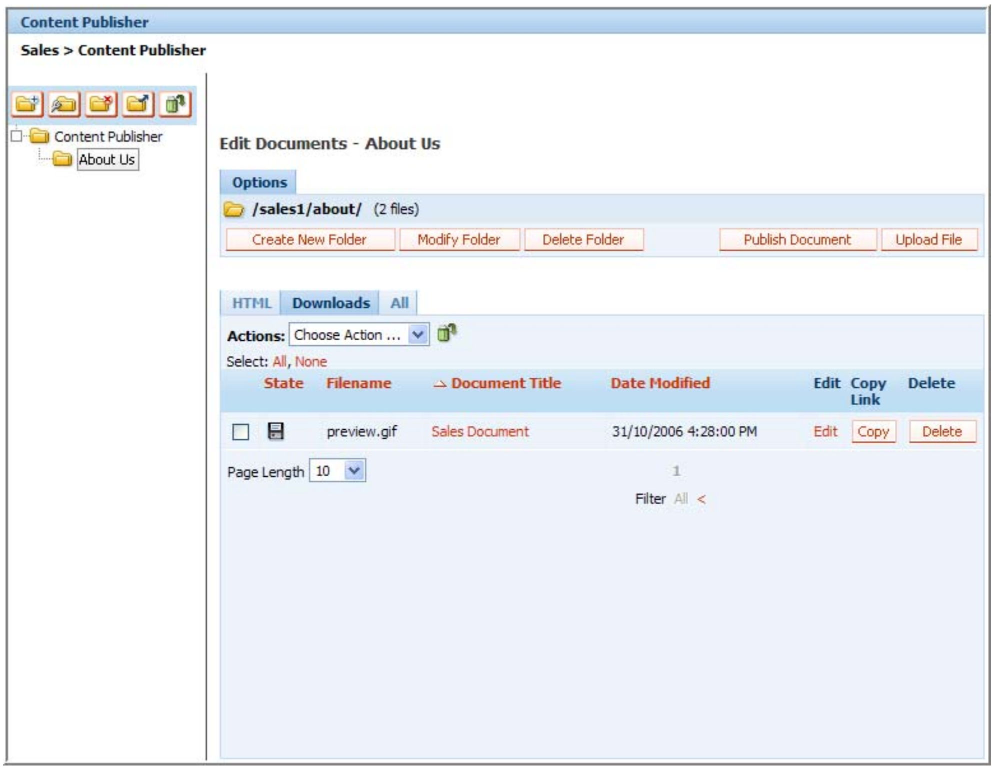
2.2.5. Adding links to uploaded files in HTML content pages

When you publish a Word document as a HTML content page you can embed links within that page. These links can be to external websites or to resources within the intranet. The following section will demonstrate how to add a link to a downloadable file that has been uploaded into the Content Publisher application (see above).

Step 1: Select **Content Management** from the **Content Publisher** menu for your site.

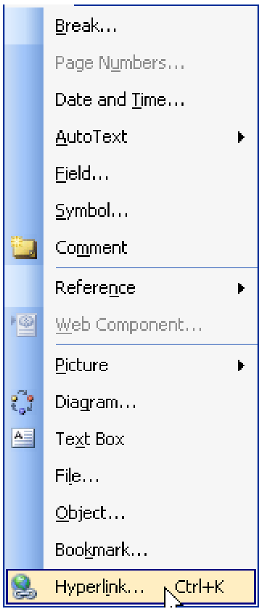
Step 2: Use the folder list to navigate to the folder in which you have previously uploaded a file

Step 3: Click the **Copy** button in the Copy Link column to copy the URL of the downloadable file to your computer's clipboard

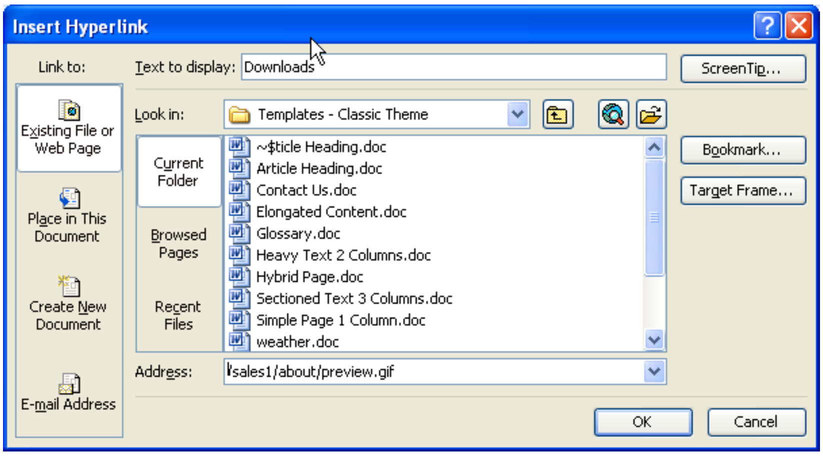


Step 4: Open the Word document that you wish to publish as HTML (e.g. download one of the available templates)

Step 5: Highlight the text in the Word document where you wish to embed the link and select **Hyperlink** from the **Insert** menu



Step 6: Paste the copied link into the address field and click **OK**



Step 7: Save the Word document and publish it through **Content Publisher** as usual (see above for instructions).

Step 8: When you access the page at the front end of the intranet the text with the embedded hyperlink will now appear as a link on the page. Clicking on the link will download the file from the intranet.

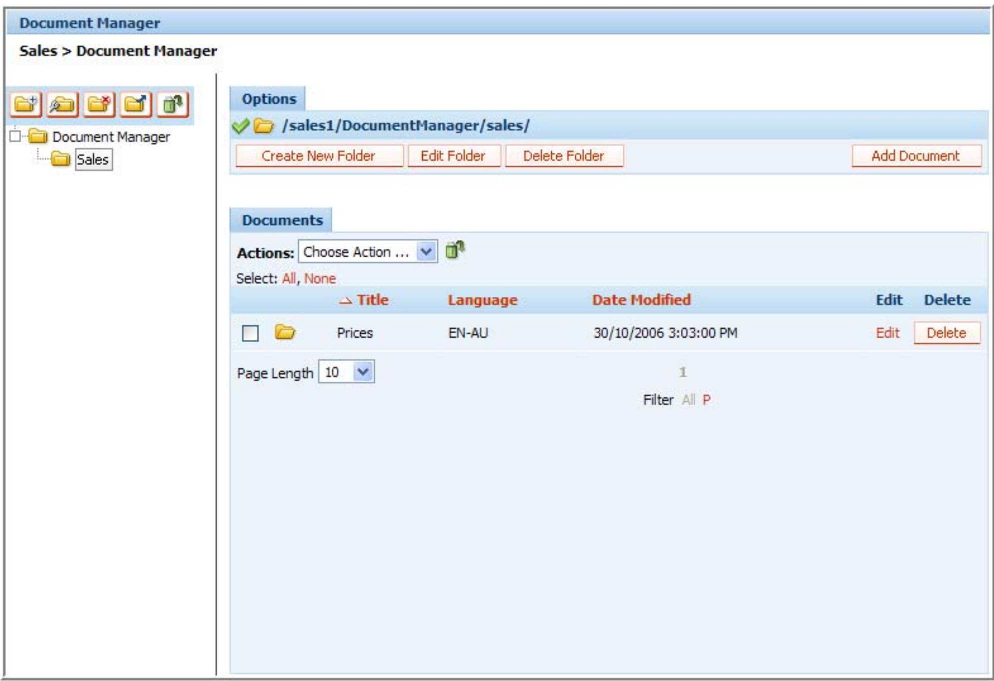
2.2.6. Addling links to documents in the Document Manager from HTML content pages

When you publish a Word document as a HTML content page you can embed links within that page. These links can be to external websites or to resources within the intranet. The following section will demonstrate how to add a link to a document that has been uploaded into the Document Manager application (see above).

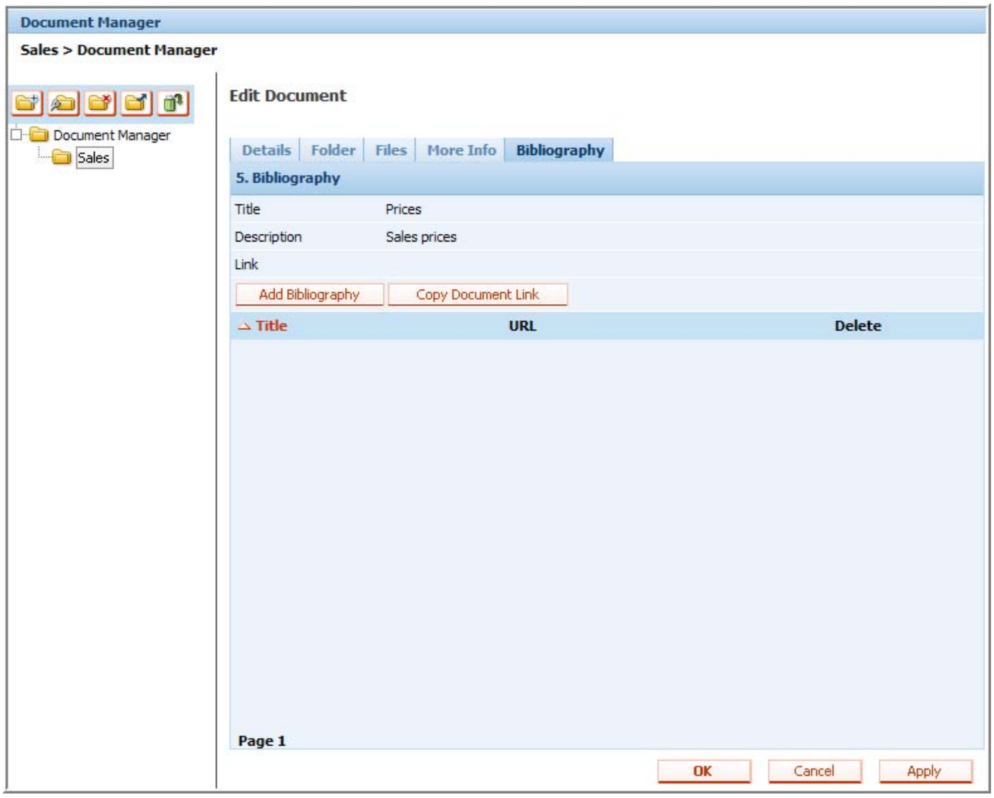
Step 1: Select **Manage Documents** from the **Document Manager** menu for your site.

Step 2: Use the folder list to navigate to the folder in which you have previously uploaded a document

Step 3: Click the **Edit** link for the document

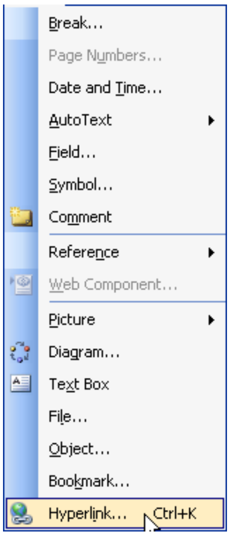


Step 4: Click to the **Bibliography** tab and click the **Copy Document Link** button to copy the URL of the document file to your computer's clipboard

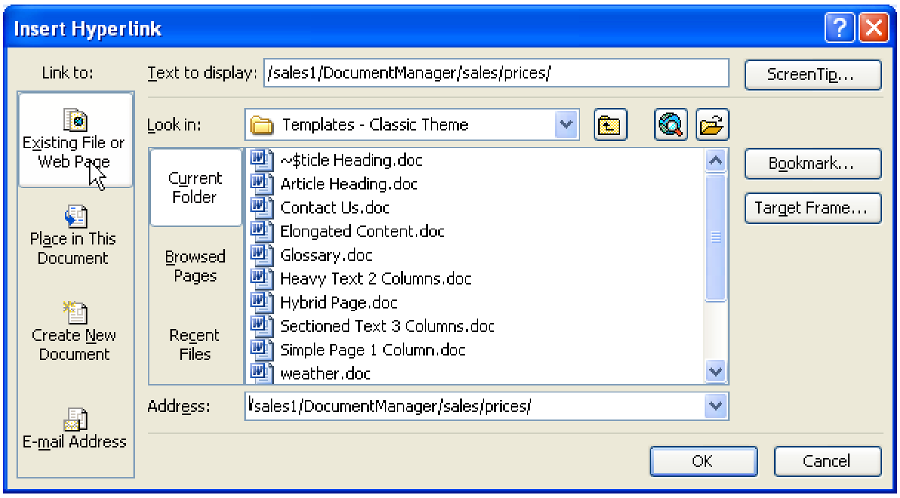


Step 5: Open the Word document that you wish to publish as HTML (e.g. download one of the available templates)

Step 6: Highlight the text in the Word document where you wish to embed the link and select **Hyperlink** from the **Insert** menu



Step 7: Paste the copied link into the address field and click **OK**



Step 8: Save the Word document and publish it through **Content Publisher** as usual (see above for instructions).

Step 9: When you access the page at the front end of the intranet the text with the embedded hyperlink will now appear as a link on the page. Clicking on the link will allow you to download the document from the Document Manager.

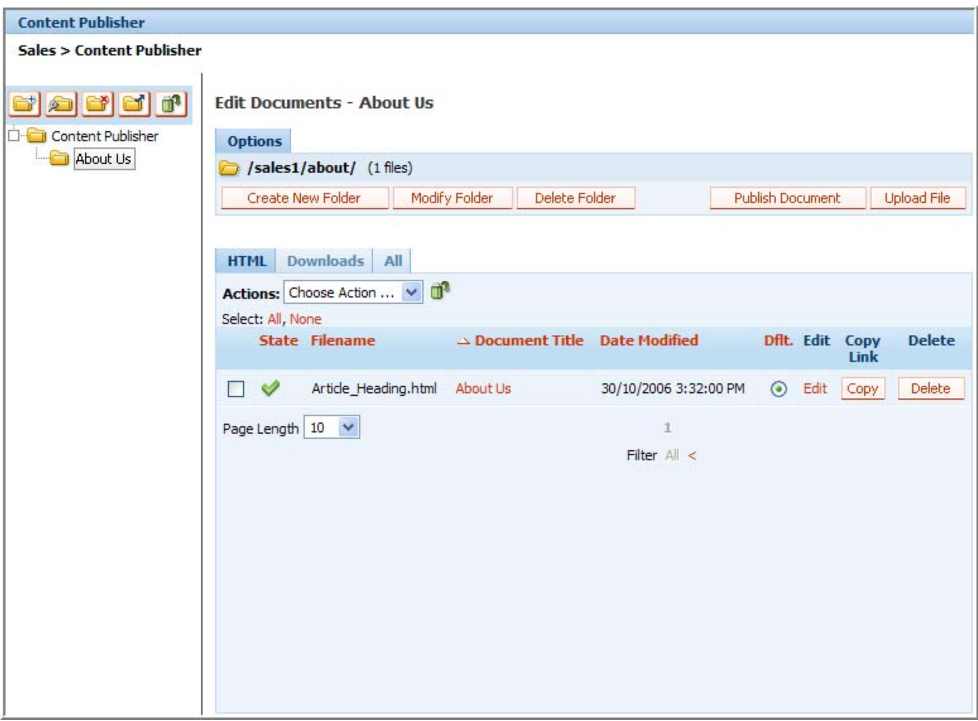
2.2.7. Version Control – Editing a HTML Content Page

When an update is made to a content page through the Content Publisher application a copy of the previous version is maintained by the system.

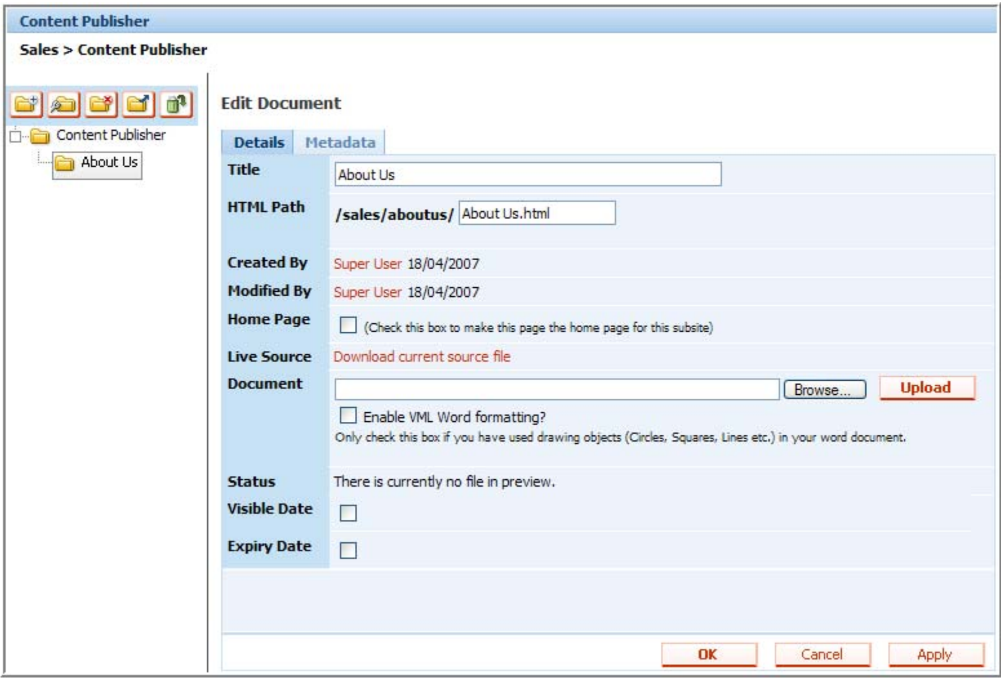
Step 1: Select **Content Management** from the **Content Publisher** menu for your site.

Step 2: Use the folder list to navigate to the folder in which you have previously published a content page

Step 3: Click the **Edit** link for the HTML Content Page to be edited



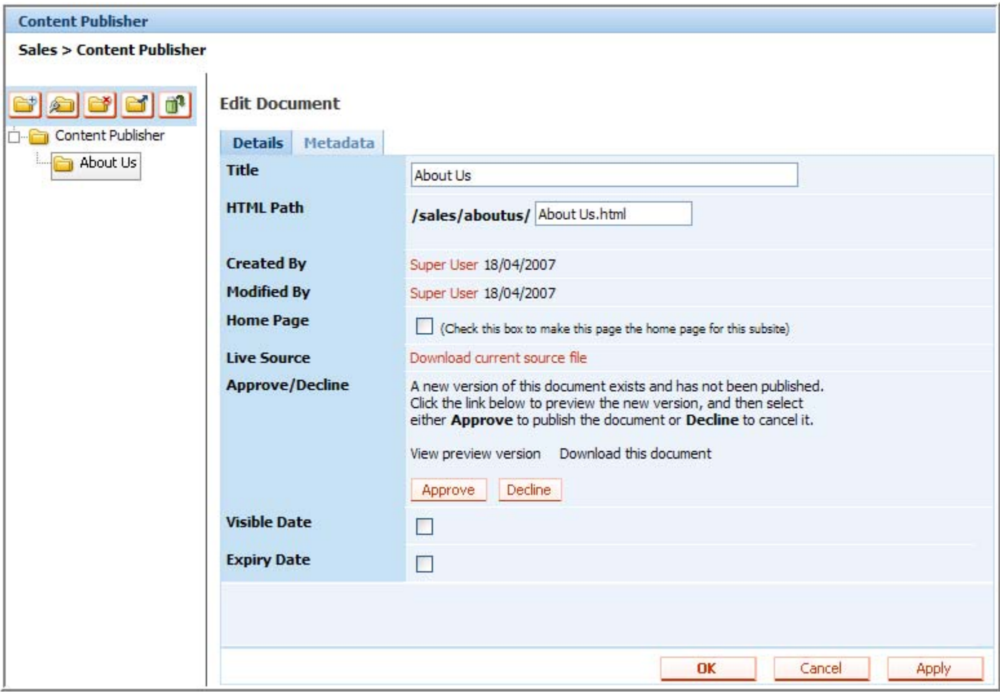
Step 4: Click the **Download current source file** link to download a copy of the Word document that was originally published



Step 5: Amend the Word document as required

Step 6: Click the **Browse** button on **Edit Document** screen, select the updated file and click **Upload**

Step 7: Click **Approve** to approve the change. If necessary you can click **View preview version** to view a preview of the updated page.



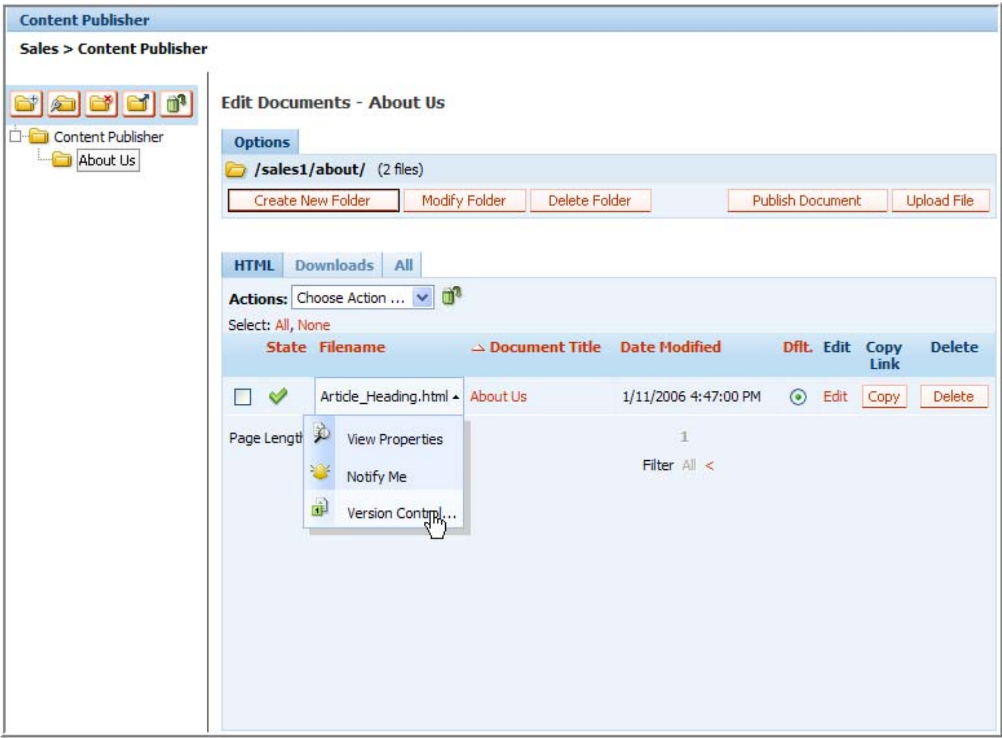
Step 8: Click **OK** to save the change and return to the folder view

2.2.8. Version Control – Rolling back to a Previous Version

When a HTML content page has been updated, previous versions of the page are retained. You can choose to rollback to a previous version of the page if required.

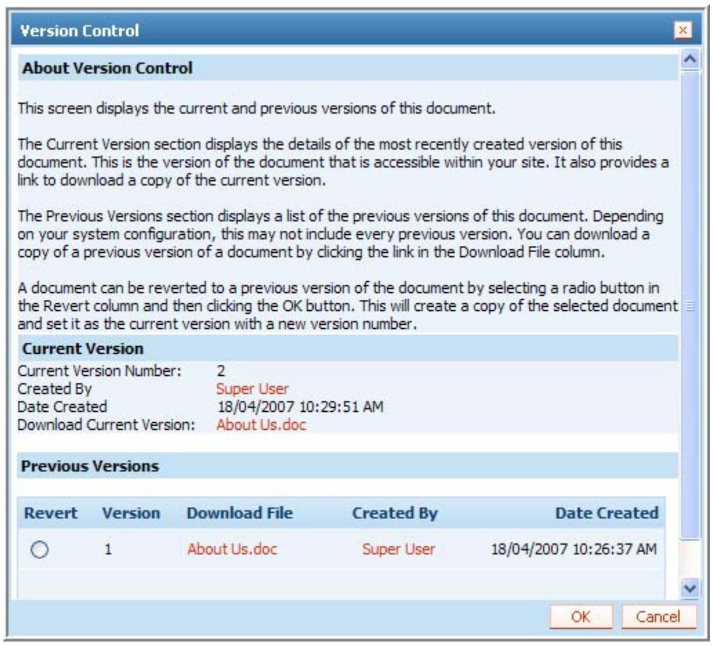
Step 1: Select **Content Management** from the **Content Publisher** menu for your site.

Step 2: Use the folder list to navigate to the folder in which you have previously published a content page



Step 3: In the Folder view click on the Filename of the content page. Select **Version Control** from the menu that drops down.

Step 4: On the **Version Control** screen select the previous version that you would like to rollback to and click **OK** e.g. Version 1

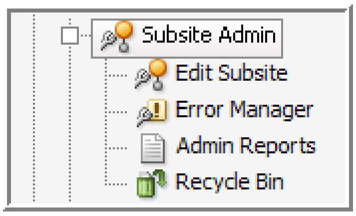


Step 5: The content page will now have reverted to the previous version. The newer version that was rollback from will also be maintained as a version.

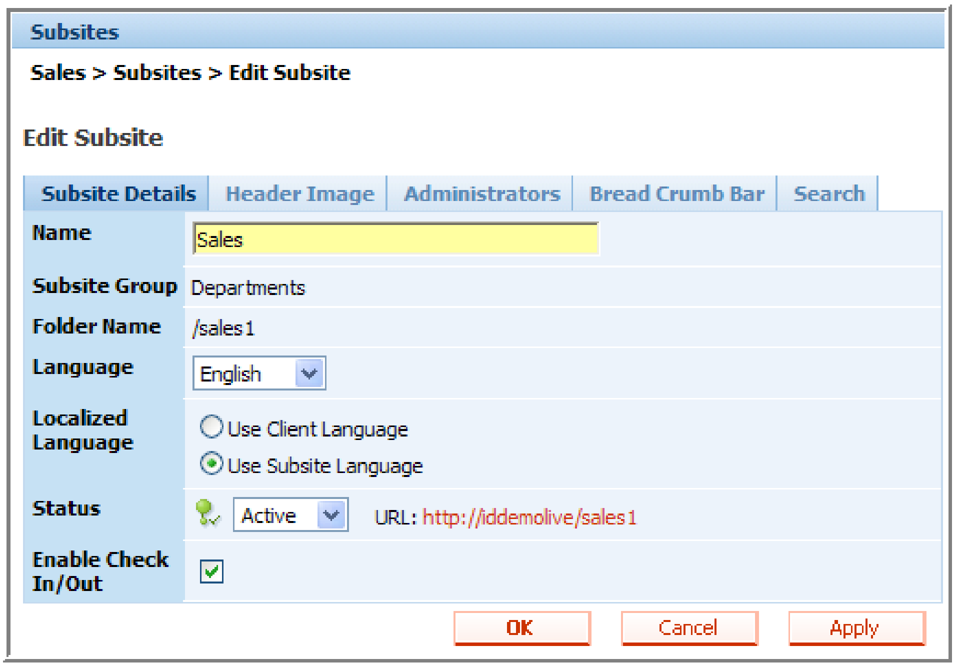
2.2.9. Check in/Check Out

If you are completing work on a HTML content page you can check the page out to ensure that other administrators/publishers in the system do not make changes to the page while you are in the process of making updates. Note: Check In/Out needs to be enabled at the subsite level when creating the subsite (see above).

Step 1: To check whether **Check In/Out** is enabled select **Edit Subsite** from the **Subsite Admin** menu for your site.



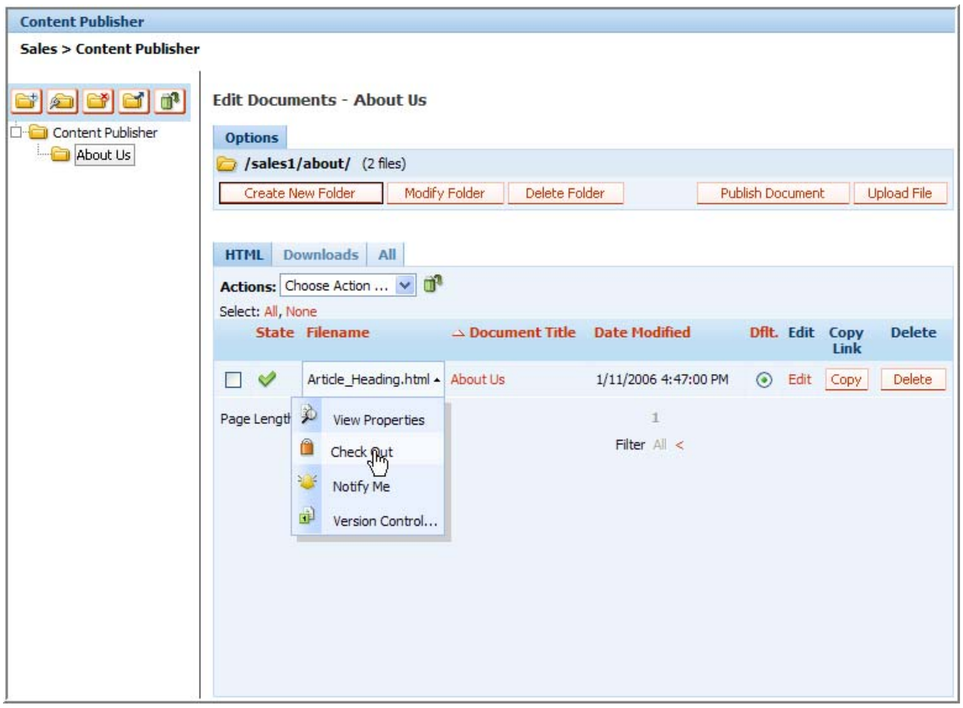
Step 2: Ensure that the **Enable Check In/Out** checkbox is checked. If not check it and click **OK**



Step 3: Select **Content Management** from the **Content Publisher** menu for your site.

Step 4: Use the folder list to navigate to the folder in which you have previously published the content page

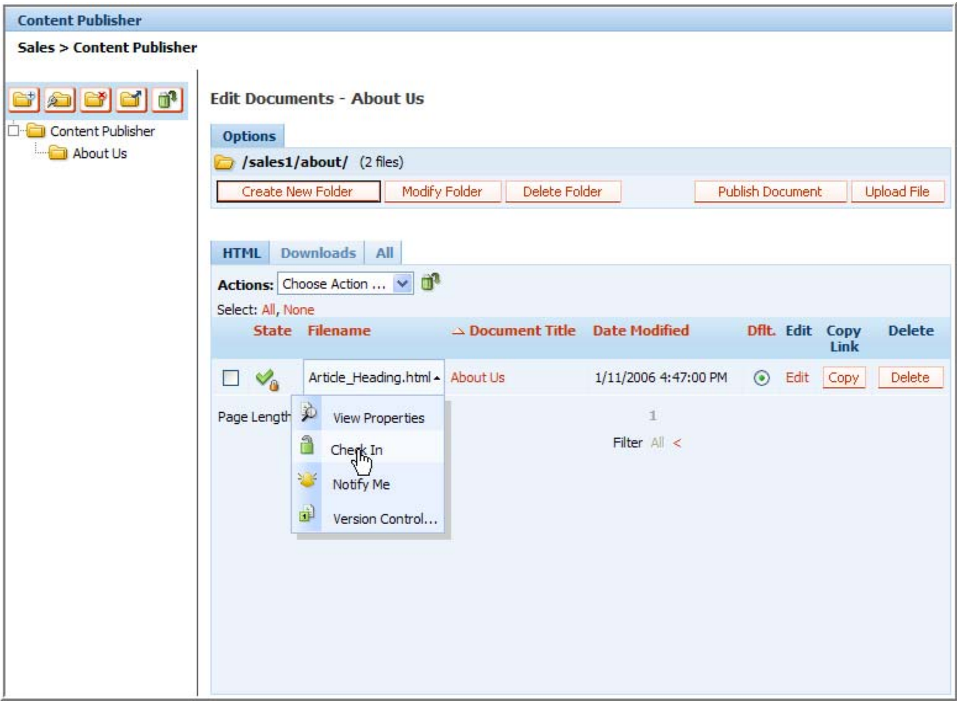
Step 5: In the Folder view click on the Filename of the content page. Select **Check Out** from the menu that drops down.



Step 6: Click **OK** to the notification that appears

Step 7: The content page will now display a padlock  in the State field to indicate that it is checked out. No other administrators/publishers will be able to edit this page.

Step 8: Once you have finished uploading your changes you will need to check the page back in so that other administrators can make changes in the future. In the Folder view click on the Filename of the content page. Select **Check In** from the menu that drops down.



Step 9: Click **OK** to the notification that appears.

Step 10: The content page is now able to be edited by other administrators/publishers

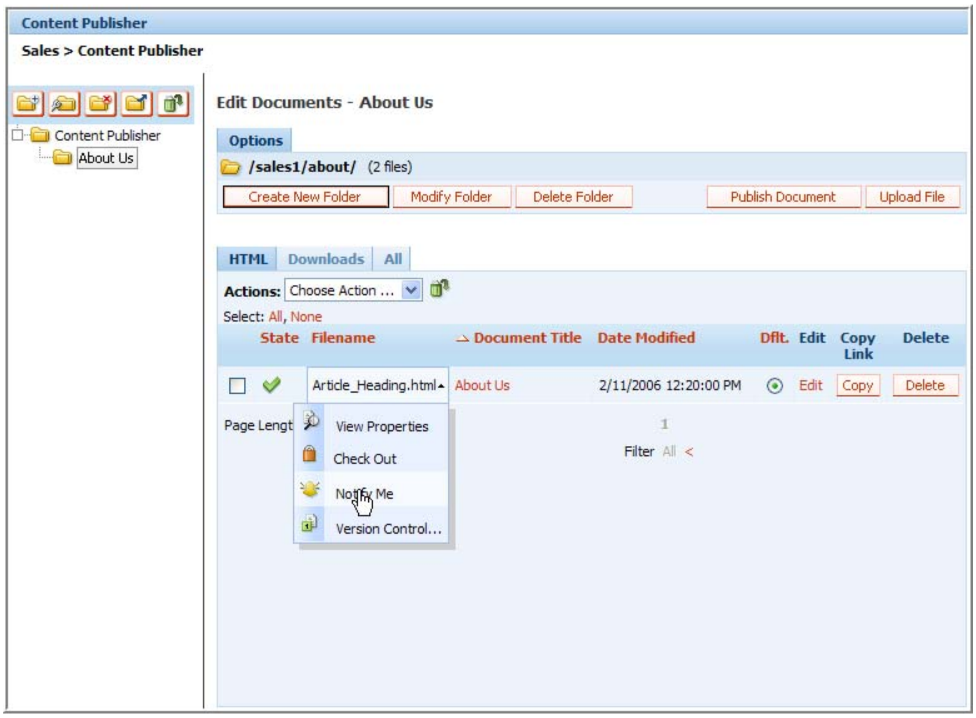
2.2.10. Content Notification

As an administrator/publisher you can choose to be notified when another administrator/publisher makes a change to a HTML content page.

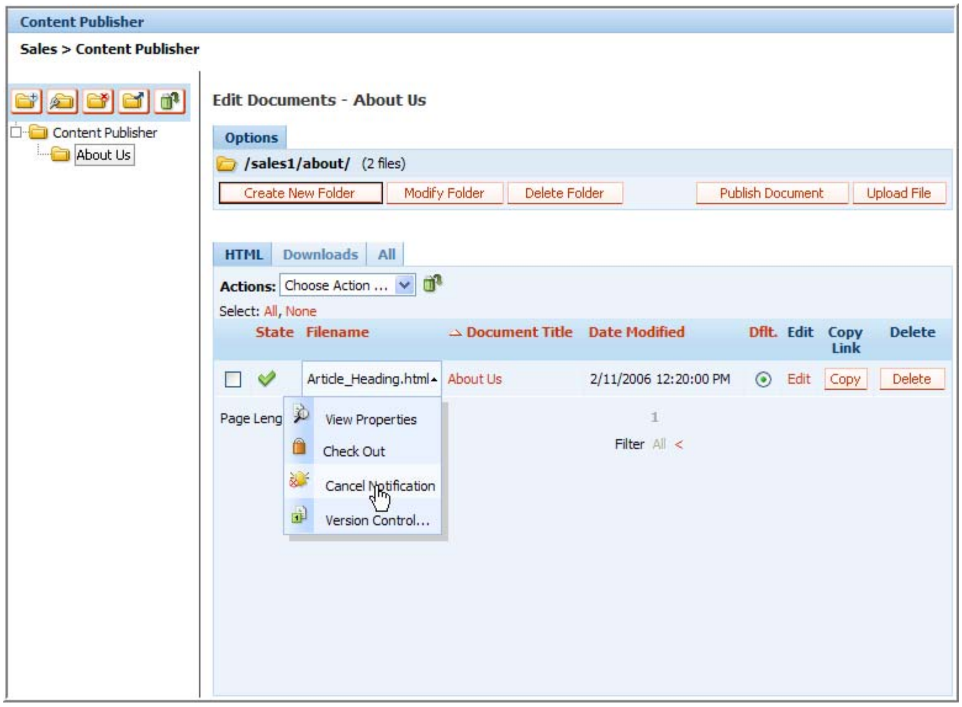
Step 1: Select **Content Management** from the **Content Publisher** menu for your site.

Step 2: Use the folder list to navigate to the folder in which you have previously published the content page

Step 3: In the Folder view click on the Filename of the content page. Select **Notify Me** from the menu that drops down.



Step 4: Click **OK** to the notification that appears. If another administrator/publisher makes a change to this HTML content page you will be notified via email. You can cancel the notification at any time by clicking on the filename again and selecting **Cancel Notification.**



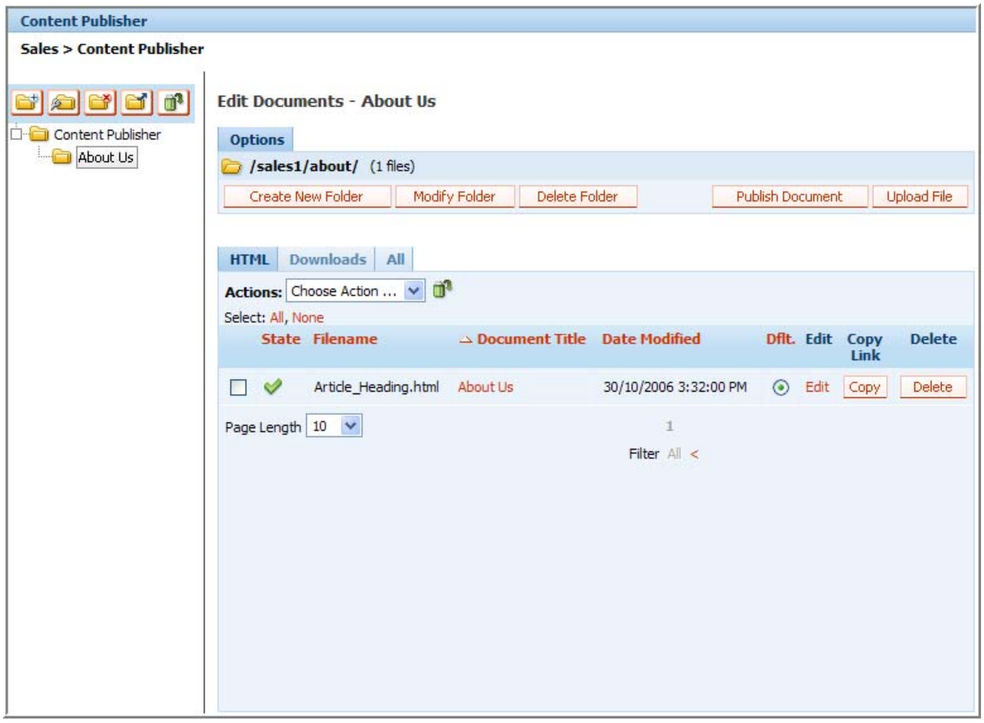
2.2.11. Content Expiry

When you create or edit a HTML content page you can set when the page becomes visible and when it expires (by default it is visible immediately and never expires). You can also choose to be notified when the page is going to expire.

Step 1: Select **Content Management** from the **Content Publisher** menu for your site.

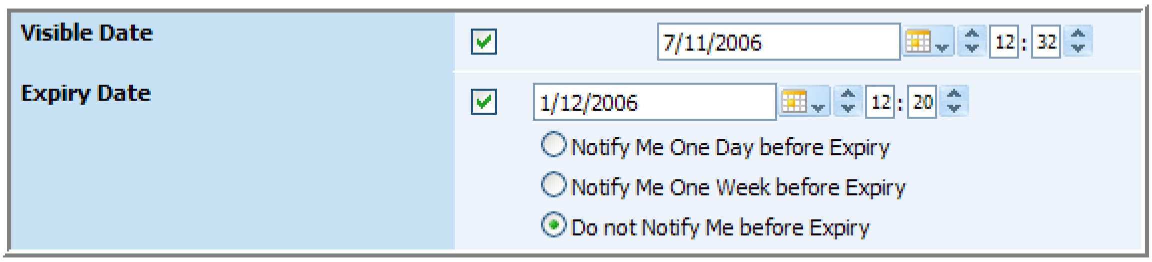
Step 2: Use the folder list to navigate to the folder in which you have previously published the content page (content visibility and expiry dates can also be set when you are publishing a new page)

Step 3: Click the **Edit** link for the HTML Content Page to be edited



Step 4: If you do not wish the page to be visible immediately, check the **Visible Date** check box and set the date when the page will become visible.

If you wish to set an expiry date for the page, check the **Expiry Date** check box and set the expiry date. You can also choose to be notified that the page is going to expire ahead of time.

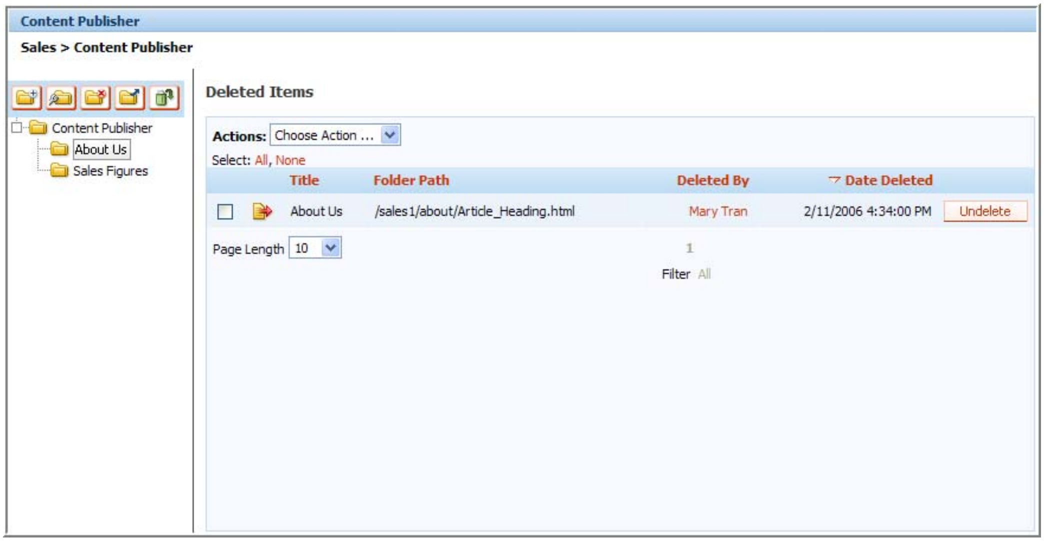


2.2.12. Undelete

When you delete a HTML content page it is sent to a recycle bin. You can choose to 'undelete' a content page, thereby restoring it to its original location

Step 1: If you have deleted a HTML content page that you wish to restore, select **Content Management** from the **Content Publisher** menu for your site.

Step 2: Click the recycle bin icon to open the recycle bin for the Content Publisher



Step 3: Click the **Undelete** button to restore the content page to its original location

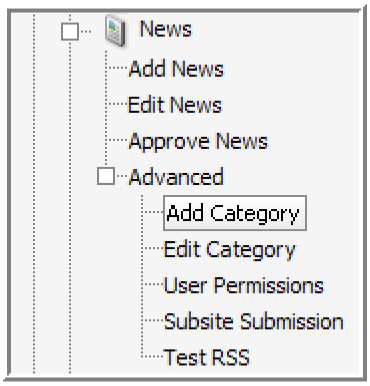
2.3. Publishing News

The News tool is generally used to publish news articles to the intranet in order to keep the user base informed of events within the company.

2.3.1. Adding a news category

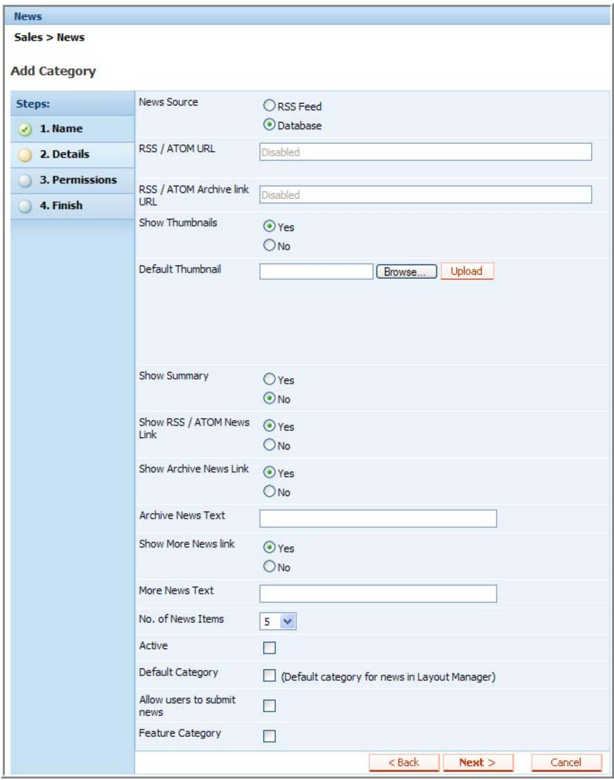
As with most other applications it is necessary to set up your categories first. The following steps will guide you through adding a news category. This category will be available for use within the current subsite and is used when selecting the type of news to be displayed on the intranet site.

Step 1: Select **Advanced** from the **News** menu, then select **Add Category**.



Step 2: Enter the **Name** and **URL Path** for the news category as required.

Step 3: Enter **Details** for the News Category (ensure that the **Active** checkbox is checked for the category to appear at the front end). Note: for information on each of the items on the Detail screen please see the in built help available by clicking **Help** in the top right hand corner of the screen.



Step 4: The **Permissions** screen is displayed. If required, modify which admin users should be allowed to amend this category.

Step 5: Click **Next** to continue.

Step 6: Click **Finish** to save.

When you go to publish news you need to ensure the category has been added to the layout first, unless it is the default category.

2.3.2. Adding a news item

Step 1: Select **Add News** from the **News** menu.

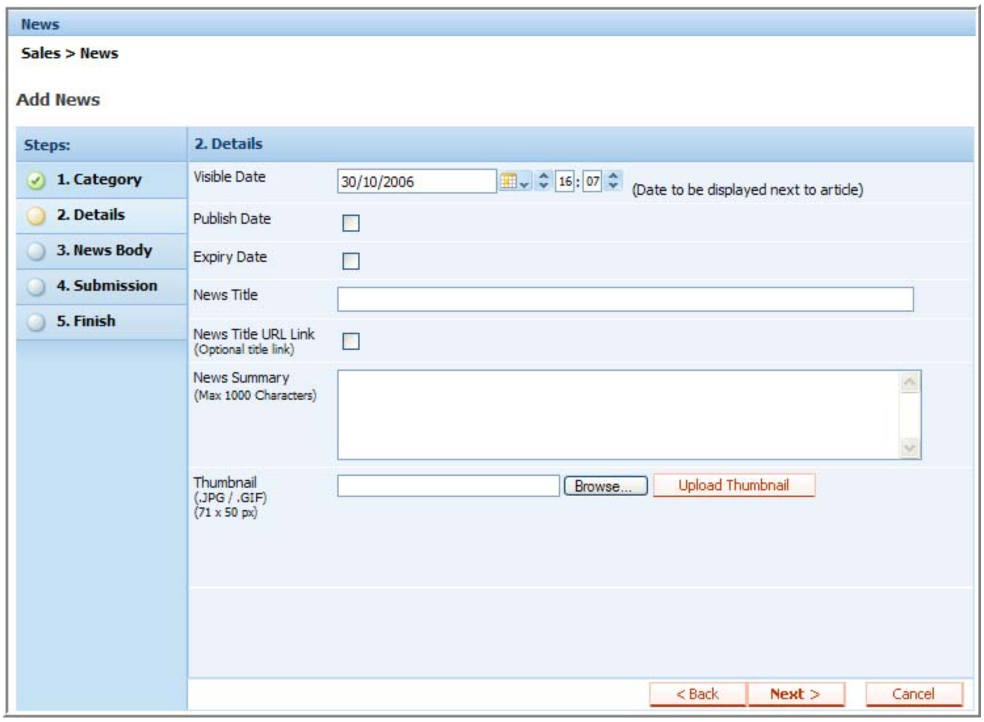
Step 2: From the **Category** list, click on the news category you would like to add the article to. (Note: if only one category has been created it will be selected automatically)

Step 3: Click **Next** to continue.

Step 4: Select the **Visible Date** that will be displayed on the article. To make the article appear only from a later date, tick the **Publish Date** box, and select the required date. The news article can also be set to **Expire** on a certain date and a notification can be sent to remind you.

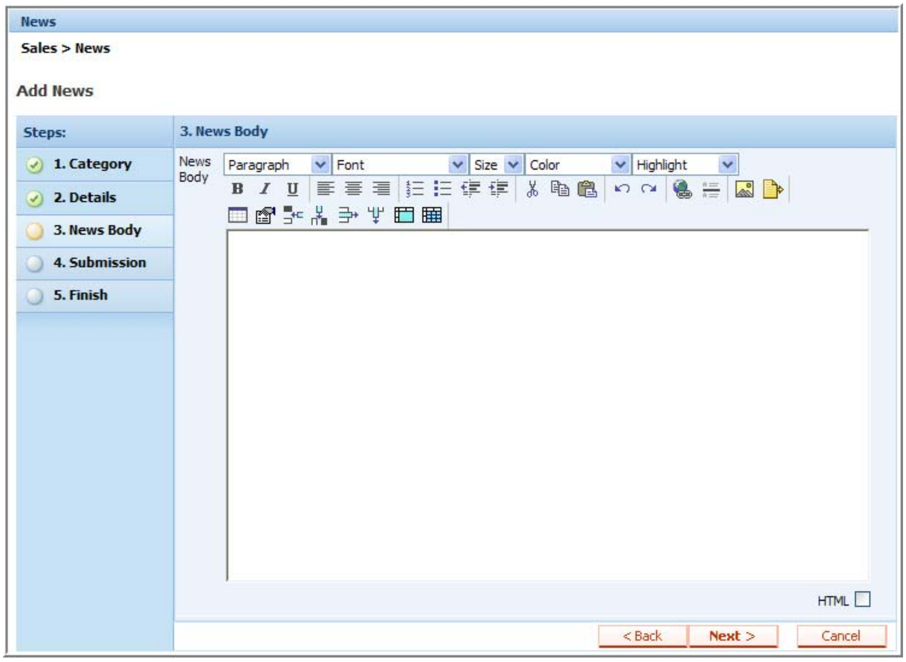
Step 5: Enter the article's **News Title** and **News Summary**.

Step 6: To include a **Thumbnail**, click on **Browse**, select the appropriate file and click on **Upload Thumbnail.**



Step 7: Click **Next** to continue.

Step 8: Enter the **News Body** for the article. Check the HTML box to include HTML tags.



Step 9: Click **Next** to continue.

Step 10: Make optional changes to the submission details if required.

- Tick the **News Approval** box to approve the news now.
- To **Submit News to other Subsites** select the appropriate subsites from the list.
- Tick the **Allow Subsites to edit this article** box to make the article updated when edited from other subsites.

Step 11: Click **Next** to continue.

Step 12: Check that the details are correct. Click on the **Back** button to make changes to previous pages.

Step 13: To preview the article click on **Preview**. A new window will pop up displaying the news article in the form it will be in on the website.

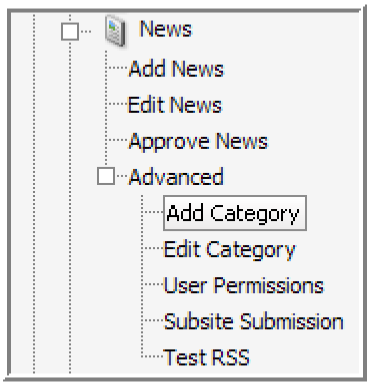
Step 14: Click **Finish** to save.

Make sure your category of news has been added to the layout.

2.3.3. Adding an RSS/Atom feed

RSS and Atom feeds are syndicated sources of news and other information from external websites. By adding an RSS/Atom news category dynamic content from an external source is available within your intranet.

Step 1: Select **Advanced** from the **News** menu, then select **Add Category**.

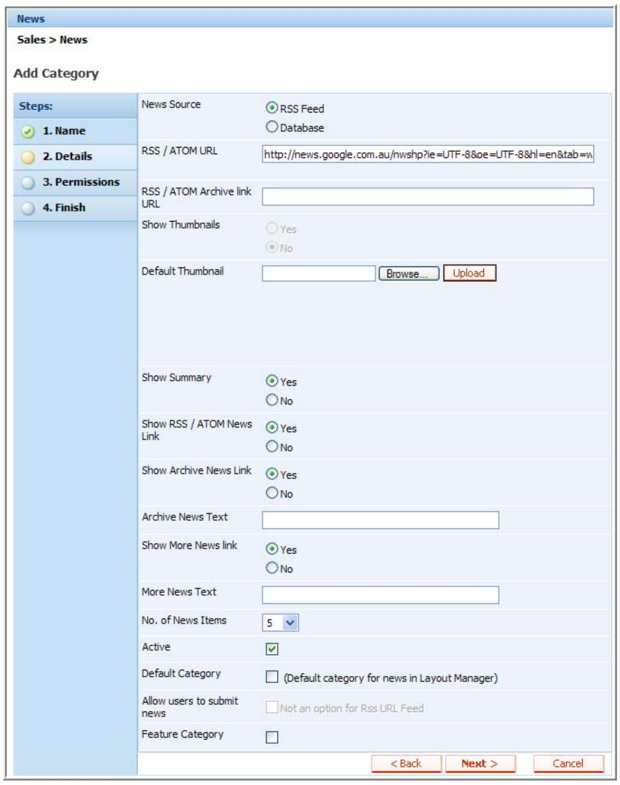


Step 2: Enter the **Name** and **URL Path** for the news category as required.

Step 3: On the **Details** screen select the RSS Feed radio button

Step 4: In the **RSS/ATOM URL** field enter the URL to the RSS/ATOM feed that you wish to subscribe to. This URL will be available from the website of the news source e.g. Google

Step 5: Enter the rest of the **Details** for the News Category (ensure that the **Active** checkbox is checked for the category to appear at the front end)



Step 6: The **Permissions** screen is displayed. If required, modify which admin users should be allowed to amend this category.

Step 7: Click **Next** to continue.

Step 8: Click **Finish** to save.

To display the RSS/ATOM feed, ensure the category has been added to the layout, unless it is the default category.

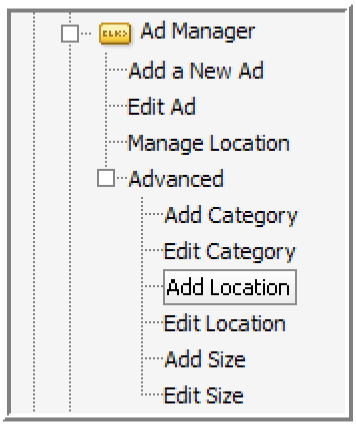
2.4. Adding Banner Ads (can also be used to link to external apps, pages, etc)

2.4.1. Creating locations

A location is a way of combining a number of ads that can be displayed in a particular position on the layout. For example, a location may be named 'internal adverts'. A number of different ads (of the same height and width size) may exist in this location, each with a relative priority determining how often the ad is shown (i.e. Rotating ads)

When adding a location through Layout Manager, you can select to just add Ad Manager to the layout or you can add a particular ‘location’ or instance of Ad Manager. All locations you have created will appear in the application list of Layout Manager. If you add Ad Manager, the default location will always be displayed. If you add a particular location, the ads within that location (with their corresponding priorities) will be used.

Step 1: Select **Advanced** from the **Ad Manager menu**, then select **Add Location**.



Step 2: Enter the **Name of this location**.

Step 3: Click **Next** to continue.

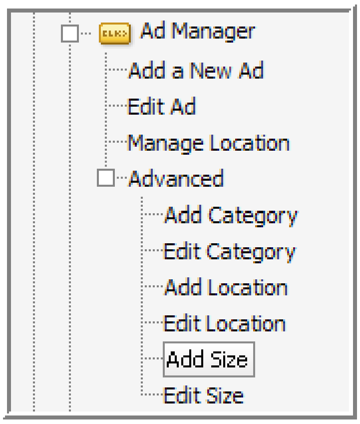
Step 4: Check that the details are correct. Click on the Back button to make changes to previous pages.

Step 5: Click **Finish** to save.

2.4.2. Adding an Ad size

When an Ad is created it is associated with a size (a height and width in pixels). The uploaded image will resize to this size to ensure that it will fit into the location on the screen that you nominate.

Step 1: Select **Advanced** from the **Ad Manager menu**, then select **Add Size**.



Step 2: Enter the **Name** of the size and the **Ad Width** and **Ad Height** in pixels.

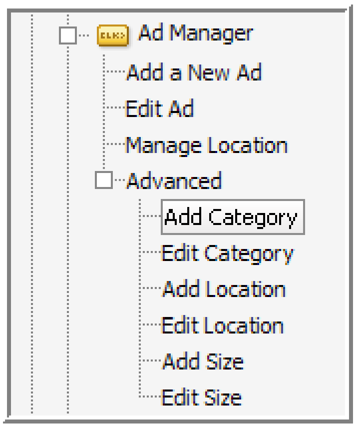
Step 3: Click **Next** to continue.

Step 4: Check that the details are correct. Click on the Back button to make changes to previous pages.

Step 5: Click **Finish** to save.

2.4.3. Creating categories

Step 1: Select **Advanced** from the **Ad Manager** menu, then select **Add Category**.



Step 2: Enter the **Name** and **Description** for the category, and whether it should be active now.

Step 3: Click **Next** to continue.

Step 4: Check that the details are correct. Click on the **Back** button to make changes to previous pages.

Step 5: Click **Finish** to save.

2.4.4. Adding a new ad

The following steps will guide you through uploading a new ad into the system. If you choose to share this ad, other subsites will be able to access your ad to place it on their own subsite. You must have at least one ad category before you can add an ad. Categories provide an effective way to group together ads of a similar nature together to help in the management of your ads.

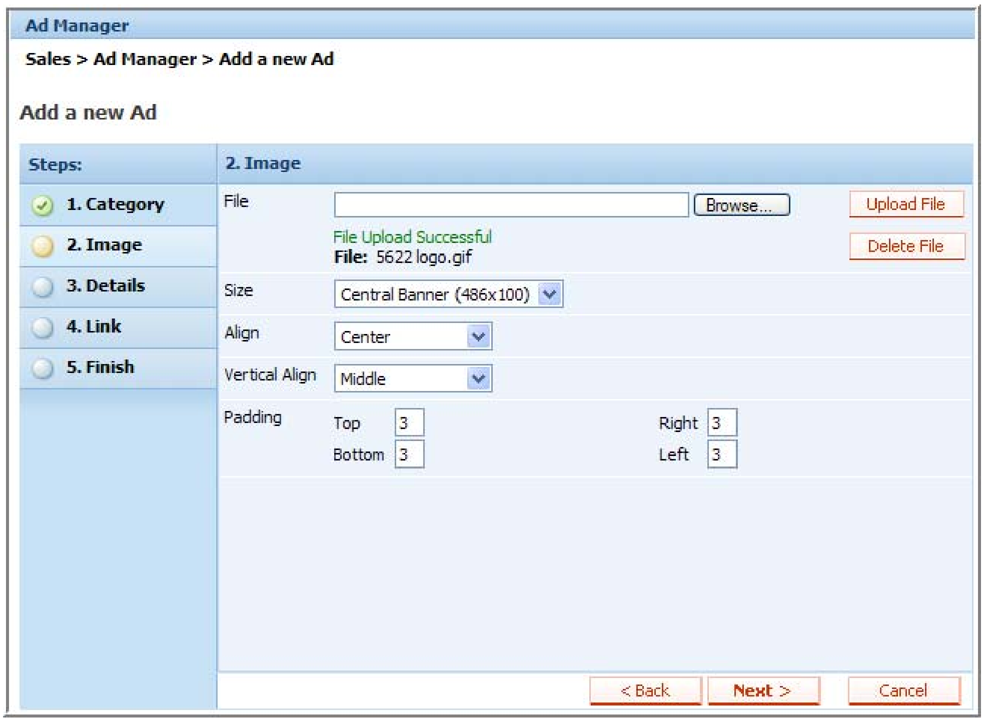
Step 1: Select **Add a New Ad** from the **Ad Manager** menu.

Step 2: Select the **Category** for the ad.

Step 3: Click **Next** to continue.

Step 4: Click **Browse**, select the image you would like to add and click on **Upload File**.

Step 5: Select a **Size** for the ad (you can amend the alignment and padding settings if required)



Step 6: Click **Next** to continue.

Step 7: Enter the **Ad Title, Description** and **Author**.

Step 8: Click **Next** to continue.

Step 9: Enter the address of the **Website** the ad should link to, and select the method to **Open In**. The Website can be an internal link within the intranet

Step 10: Click **Next** to continue.

Step 11: Check that the details are correct. Click on the **Back** button to make changes to previous pages.

Step 12: Tick the **Shared** checkbox if you would like to share the ad for use in other subsites.

Step 13: Click **Finish** to save.

2.4.5. Managing a location

Now that an ad (or ads) has been created you need to specify which ad appears in the locations on the screen that you have created.

Step 1: Select **Manage Location** from the **Ad Manager** menu.

Step 2: Click on the name of the location you wish to manage (e.g. the Internal adverts location created earlier)

Step 3: Click **Insert Ad**

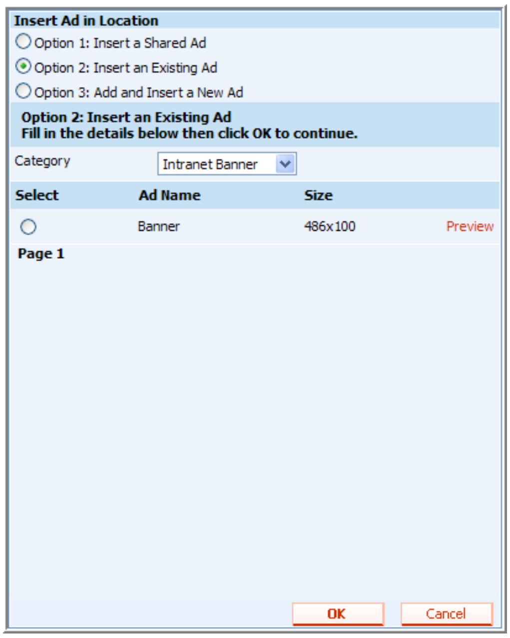
Step 4: You can choose to:

- **Insert and Shared Ad** from another site
- **Insert an Existing Ad** that you have created
- **Add and Insert a New Add** in the same way you created an ad earlier

Step 5: In this example choose **Insert an Existing Ad**

Step 6: Select a **Category**

Step 7: Select an **Ad**



Step 8: Click **OK** to insert the ad into the location

Step 9: With only one ad in the location it will appear 100% of the time. If you insert additional ads you can adjust the priority of each one.

Step 10: Click **OK** To save the changes to the location

The location must be included in the layout of the site for the ad to appear. The location will appear as a separate instance of the Ad Manager application in the Layout Manager application.

2.5. Using Statistics Reporter

Please refer to this article for the initial set up procedure,
http://support.intranetdashboard.com/home/faq/43/37/83/FaqQuestionFront.aspx?

Statistics Reporter allows users to view comprehensive statistics and metrics which provide vital feedback on the major components of your intranet. There are three types of statistics you can view through **Intranet DASHBOARD**; general stats, application stats and subsite group stats.

The statistics are based on the number of **impressions**, which is a visit to a page. **General stats** allow you to view the number of impressions for each page in your subsite. **Application stats** allow you to view details of the activity within each application. **Subsite group stats** allow you to compare the number of visits between subsite groups, and between subsites within a group.

2.5.1. General Stats

General stats allow you to view the number of impressions for each page in your subsite. An **Impression** is a single visit to a page.

Step 1: Select **Statistics Report** from the **Statistics Reporter** menu.

Step 2: Select **General Stats**.

Step 3: Select the time period you wish to view the statistics for using the **From** and **To** boxes.

Step 4: Click on **Display Report**.

Step 5: Click on **Export to CSV** if you would like to save these statistics to your computer.

2.5.2. Application Stats

Application stats allow you to view details of the activity within each application. For example, the number of news articles added or the number of e-Postcards sent. You can view these details for a particular subsite, or for the whole of your intranet.

Step 1: Select **Statistics Report** from the **Statistics Reporter** menu.

Step 2: Click on the **Application Stats** tab.

Step 3: Select the time period you wish to view the statistics for using the **From** and **To** boxes. If you wish to view application statistics for a particular subsite only, select the **Subsite** from the list.

Step 4: Click on **Display Report**.

Step 5: Click on **Export to CSV** if you would like to save these statistics to your computer.

2.5.3. Subsite Group Stats

Subsite group stats allow you to compare the number of visits between subsite groups, and between subsites within a group.

Step 1: Select **Statistics Report** from the **Statistics Reporter** menu.

Step 2: Click on the **Subsite Group Stats** tab.

Step 3: Select the time period you wish to view the statistics for using the **From** and **To** boxes.

Step 4: Click on **Display Report**.

Step 5: To view the details of individual subsites, click on the appropriate **Subsite Group**.

3. Business Tools

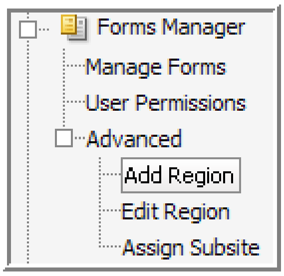
3.1. Forms Manager

The Forms Manager is designed to manage your site's downloadable or online forms. It provides an interface based on categories and upon scenarios where there is a process that requires multiple forms to be filled out in a particular order.

3.1.1. Adding Regions

The Forms Manager is based around regions. Regions have particular subsites assigned to them so that forms can be shared between particular groups of sites e.g. sites that belong to a particular region in an organization.

Step 1: Select **Advanced > Add Region** from the **Forms Manager** menu in your site



Step 2: Enter a **Name** for the region and check the **Active** box to activate the region

Step 3: Click **Next**

Step 4: Select the sites that should be associated with this region. All sites within a region will share the same set of forms

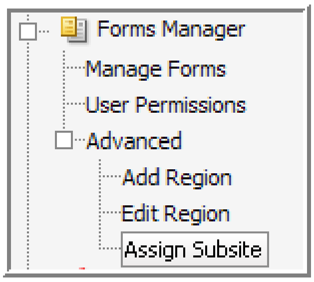
Step 5: Click **Next**

Step 6: Review the details of the region and click **Finish** to add the region

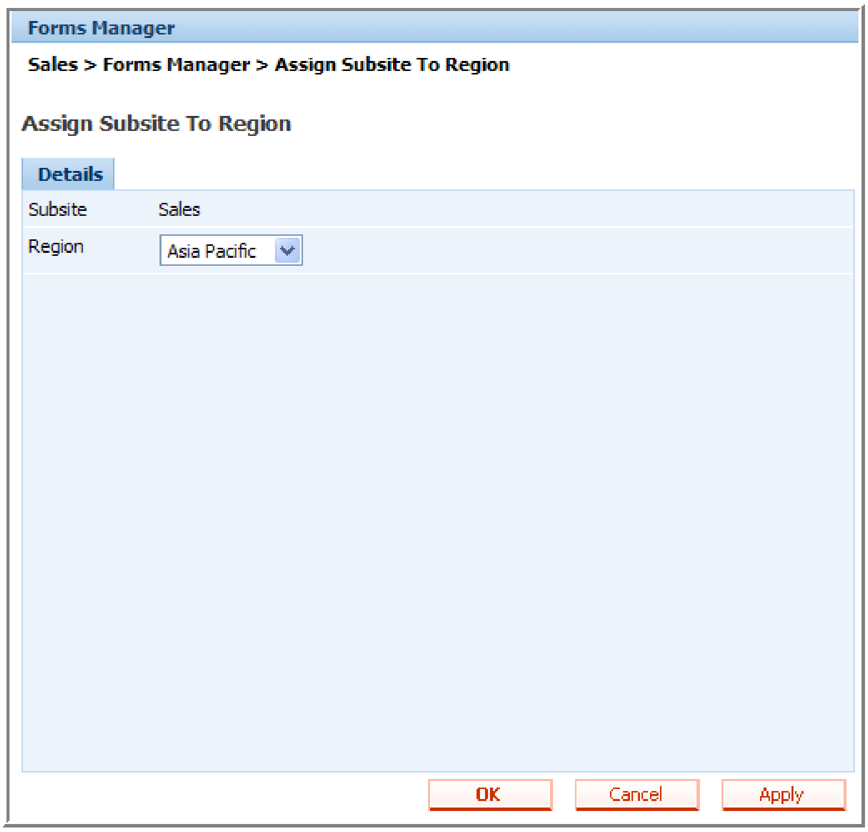
3.1.2. Managing Regions

Once regions exist you can change the region that your site belongs to.

Step 1: Select **Advanced > Assign Subsite** from the **Forms Manager** menu in your site



Step 2: Select the region from the **Region** drop down list



Step 3: Click **OK** to save your change. The site will now be assigned to your selected region.

3.1.3. Adding Categories

In order to add Forms to the Forms Manager it is necessary to create categories (essentially folders) in which to store the forms.

Step 1: Select **Manage Forms** from the **Forms Manager** menu for your subsite.

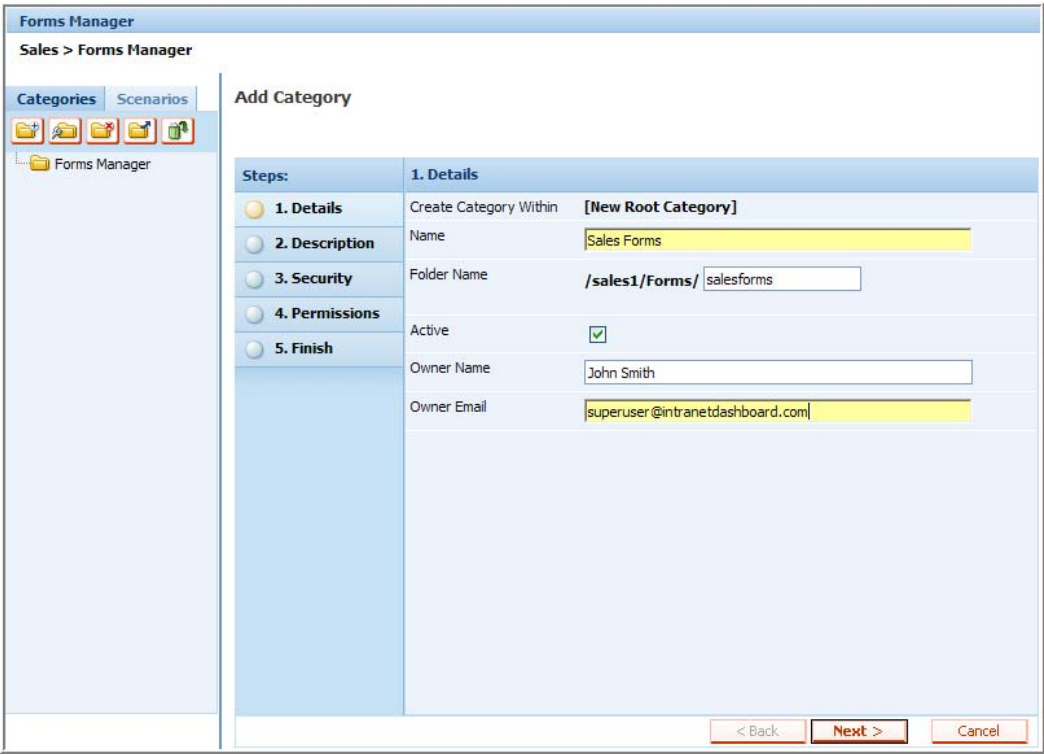
Step 2: Select the category you would like to add the new folder into (the root category will be called **Forms Manager**).

Step 3: Click on the  button to create a new category.

Step 4: On the Details screen enter a **Name** and a **Folder Name** for the new category.

Check the **Active** checkbox in order to make the category active.

Enter the name and email address of the owner of this category in the **Owner Name** and **Owner Email** fields. These details will allow end users to contact the owner if they have any comments/questions about the forms.



Step 5: Click **Next** to continue

Step 6: Enter a **Description** for the category

Step 7: Click **Next** to continue

Step 8: The **Security** screen is displayed. If required, modify which intranet website users you would like to be able to access this folder. As the default, access shall be available to all users.

Step 9: The **Permissions** screen is displayed. If required, modify which admin users should be allowed to amend this folder.

Step 10: Check that the details are correct. Click on the **Back** button to make changes to previous pages.

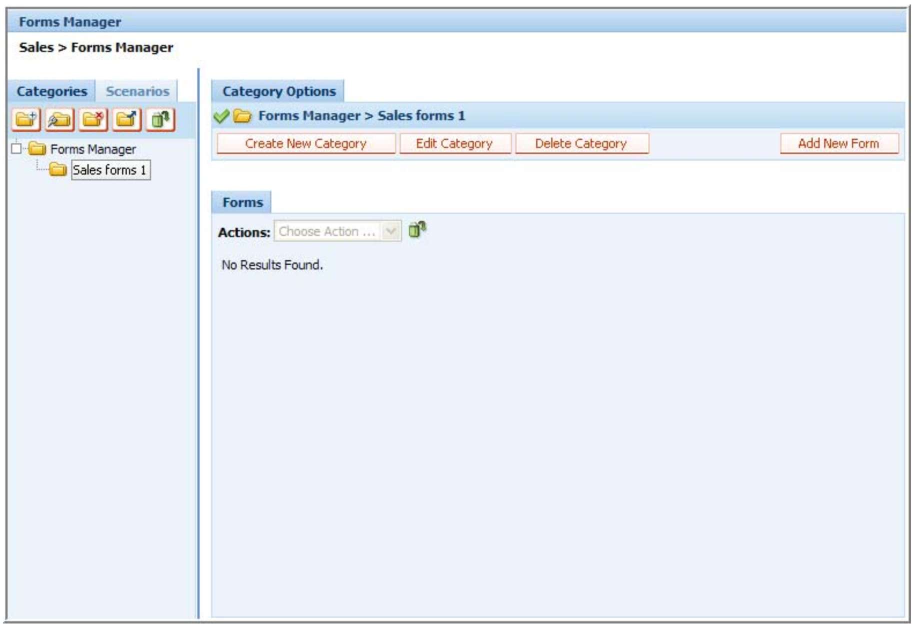
Step 11: Click **Finish** to save.

3.1.4. Adding Forms

The following steps will guide you through adding a new form. You must add a category before you can add a form.

Step 1: Select **Manage Forms** from the **Document Manager** menu in your subsite

Step 2: Use the folder list to navigate to the category you would like to add a form to.



Step 3: Click on **Add New Form**

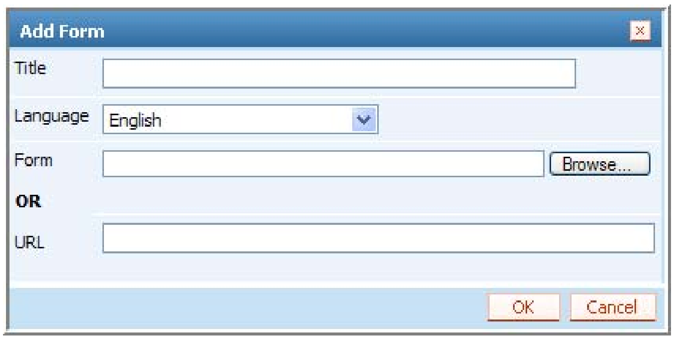
Step 4: Enter a **Title**, **Folder Name** and **Description**.

The details of the owner of the category are automatically populated in the **Owner Name** and **Owner Email** fields. You can choose to change this if required.

Uncheck the **Display in "Most Viewed Forms"** checkbox if you do not wish the form to appear in a list of most viewed forms.

Step 5: Click **Next** to continue

Step 6: Click on **Add Form**. Enter the **Title,** select the **Language** of the form and either click **Browse** and locate the document, or enter a website address. If you have an online form simply enter the URL to that form in the URL field. Click **OK**.



Step 7: Repeat this process to add the form in other languages

Step 8: Click **Next** to continue.

Step 9: You can choose to upload a Word document containing **More Info** about the form.

Step 10: Click **Next** to continue.

Step 11: Tick the boxes corresponding to the category(s) you would like to add the form to.

Step 12: Check that the details are correct. Click on the **Back** button to make changes to previous pages.

Step 13: Click **Finish** to save.

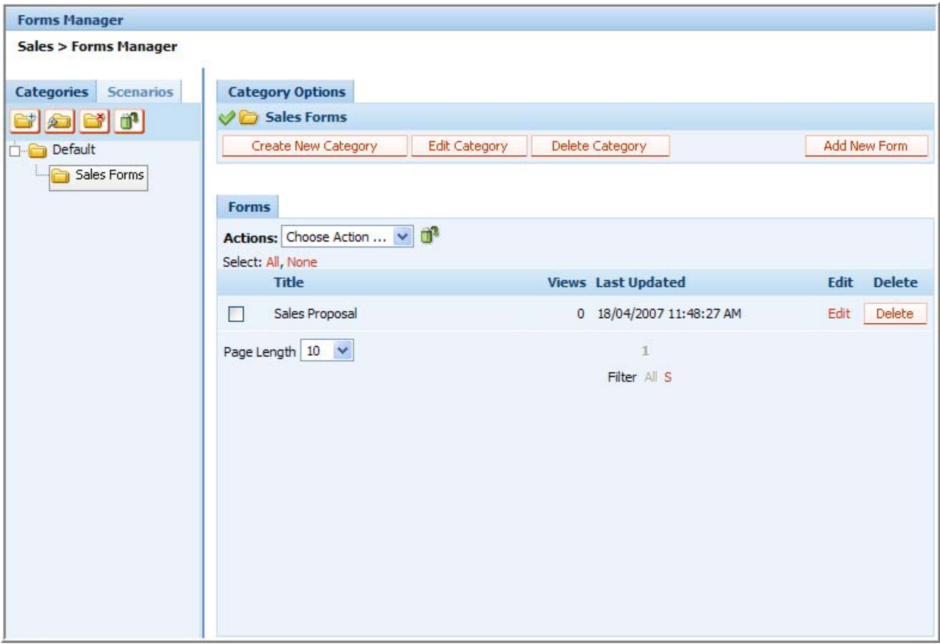
3.1.5. Version Control – Editing a form

When an update is made to a form through the Forms Manager application a copy of the previous version is maintained by the system.

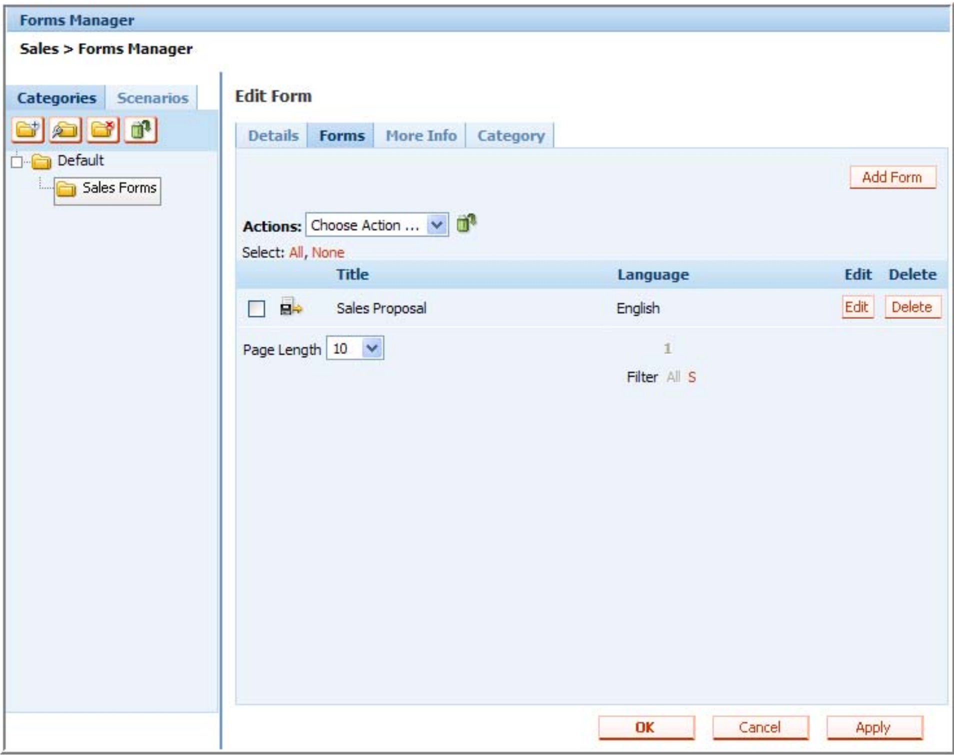
Step 1: Select **Forms Manager** from the **Forms Manager** menu for your site.

Step 2: Use the folder list to navigate to the category in which you have previously saved the form

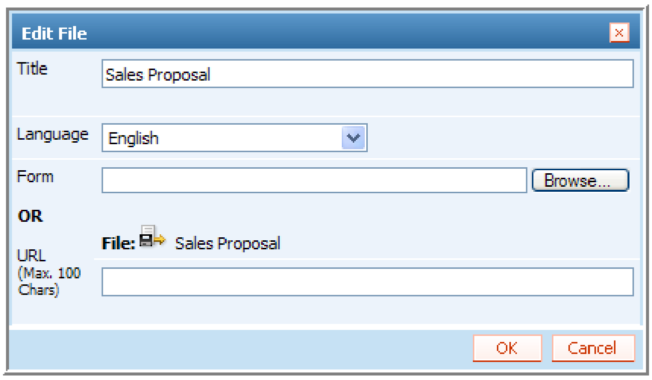
Step 3: Click the **Edit** link for the form to be edited



Step 4: Select the **Forms** tab on the **Edit Form** screen.



Step 5: Click the **Edit** button



Step 6: Click the **Browse** button on **Edit File** screen, select the updated file

Step 7: Click **OK** to upload the updated file

Step 8: Click **OK** on the **Forms** tab screen to save the change and return to the folder view

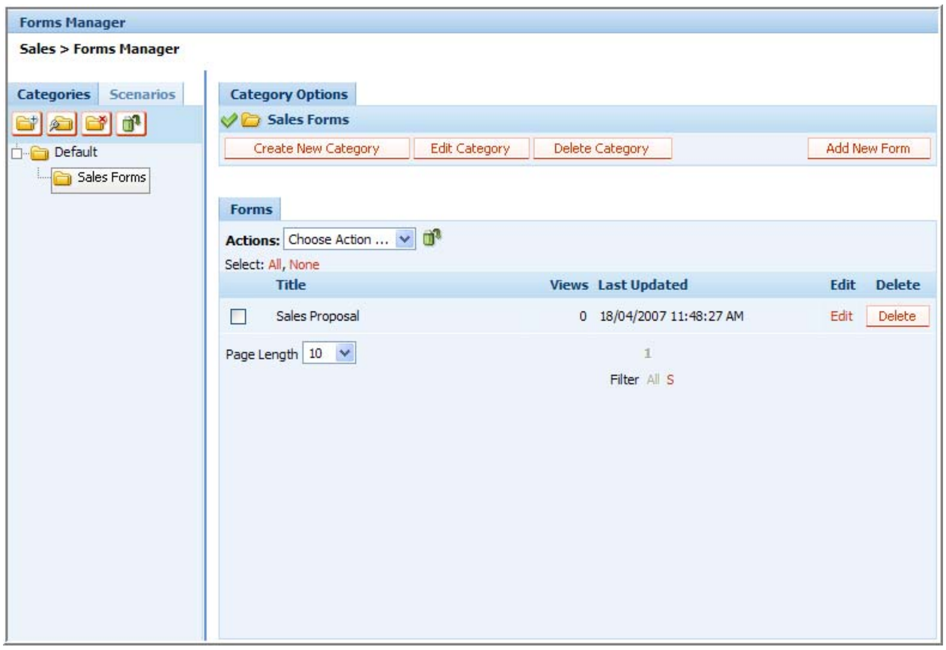
3.1.6. Version Control – Rolling back to a Previous Version of a form

When a form has been updated, previous versions of the document are retained. You can choose to rollback to a previous version of the form if required.

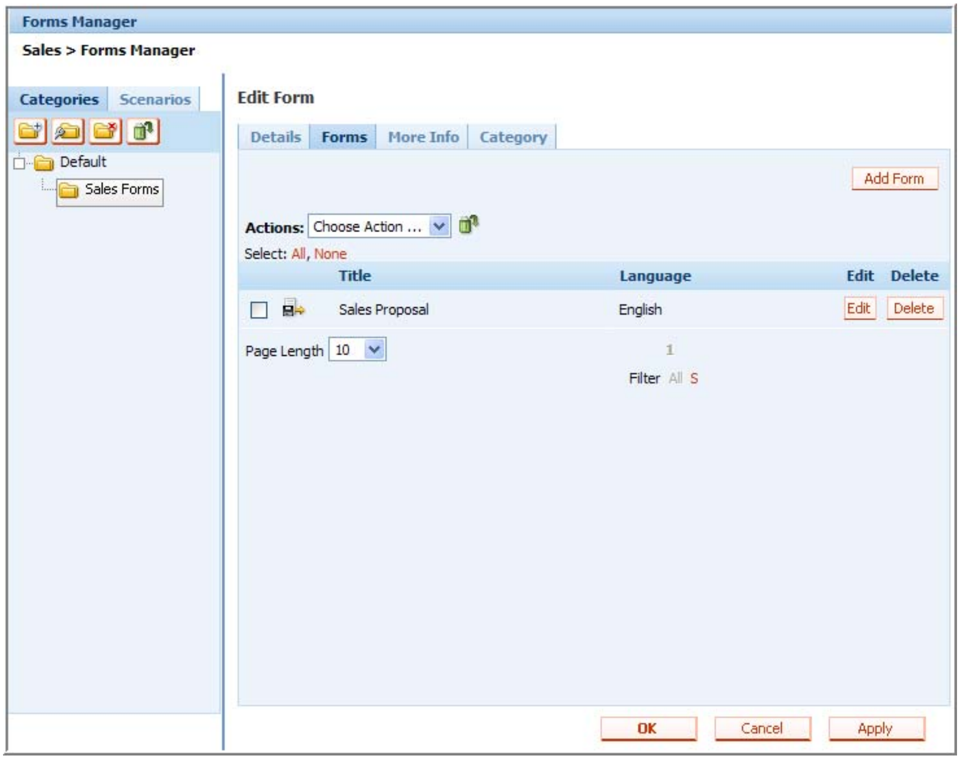
Step 1: Select **Forms Manager** from the **Forms Manager** menu for your site.

Step 2: Use the folder list to navigate to the folder in which you have previously added a form

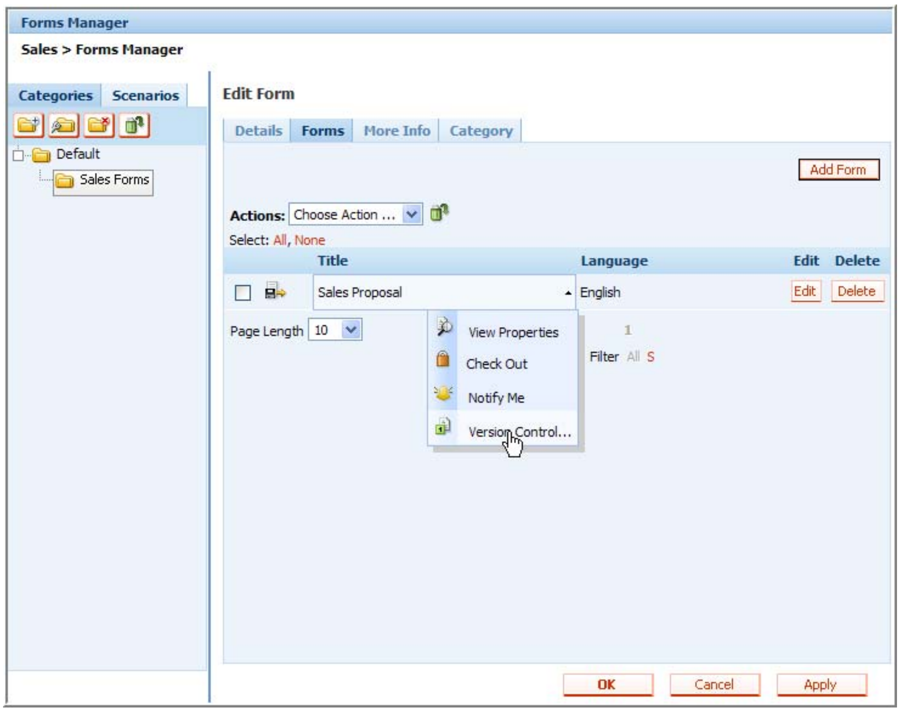
Step 3: Click the **Edit** link for the form to be edited



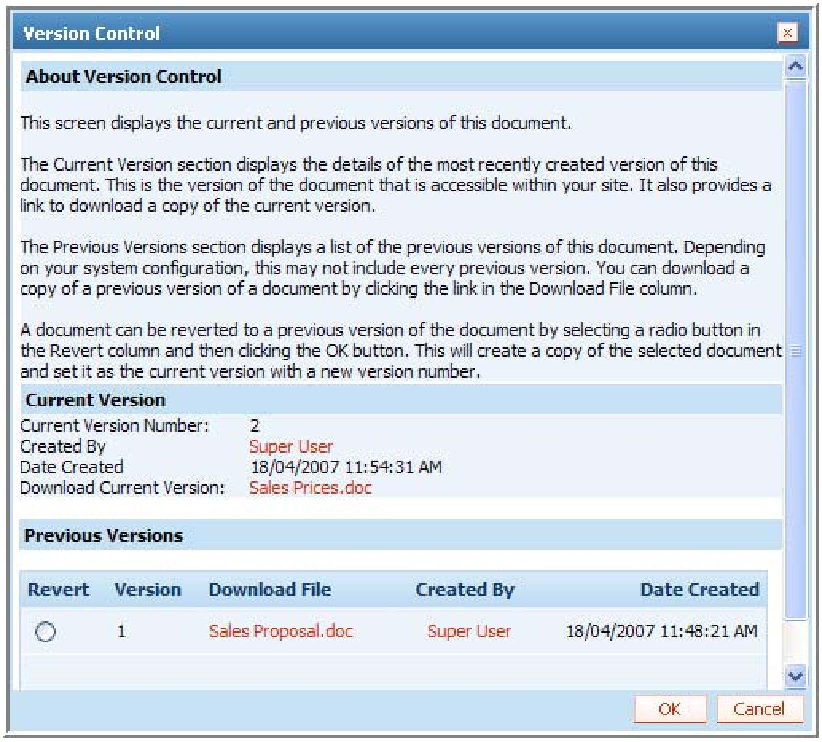
Step 4: Select the **Forms** tab screen



Step 5: On the **Forms** tab click on the title of the form. Select **Version Control** from the menu that drops down.



Step 6: On the **Version Control** screen select the previous version that you would like to rollback to and click **OK** e.g. Version 1

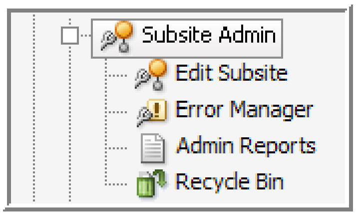


Step 7: The document will now have reverted to the previous version. The newer version that was rollback from will also be maintained as a version

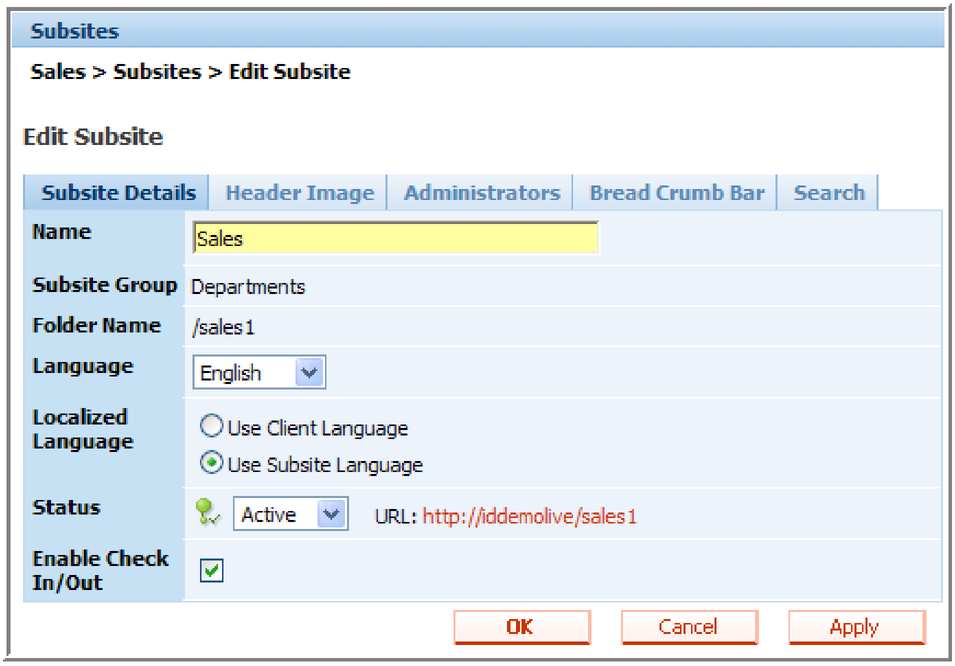
3.1.7. Check in/Check Out

If you are completing work on a form you can check the form out to ensure that other administrators/publishers in the system do not make changes to the form while you are in the process of making updates. Note: Check In/Out needs to be enabled at the subsite level when creating the subsite (see above).

Step 1: To check whether **Check In/Out** is enabled select **Edit Subsite** from the **Subsite Admin** menu for your site.



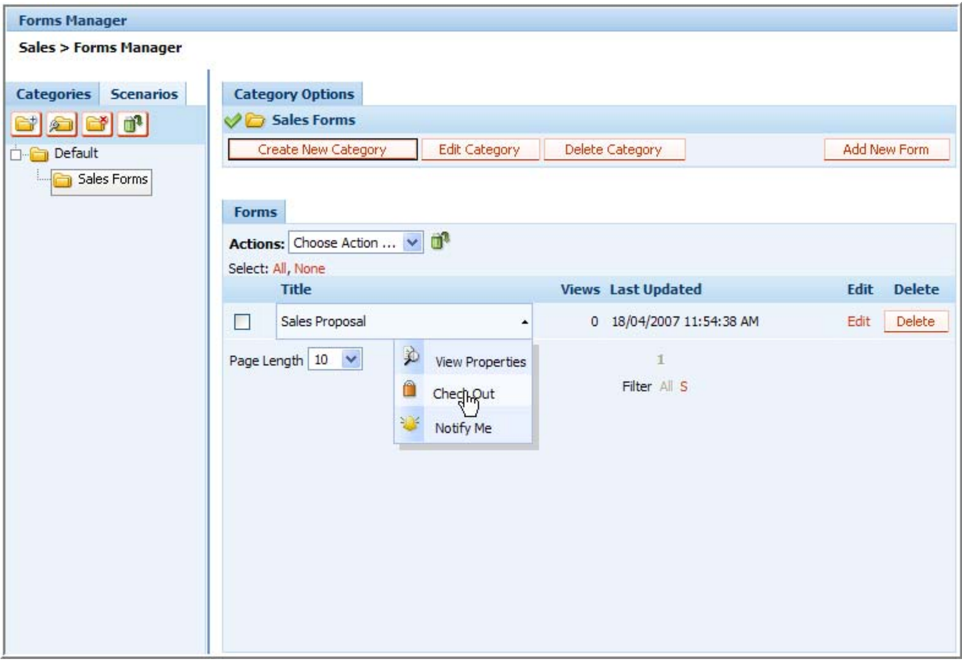
Step 2: Ensure that the **Enable Check In/Out** checkbox is checked. If not check it and click **OK**



Step 3: Select **Forms Manager** from the **Forms Manager** menu for your site.

Step 4: Use the folder list to navigate to the folder in which you have previously uploaded the form

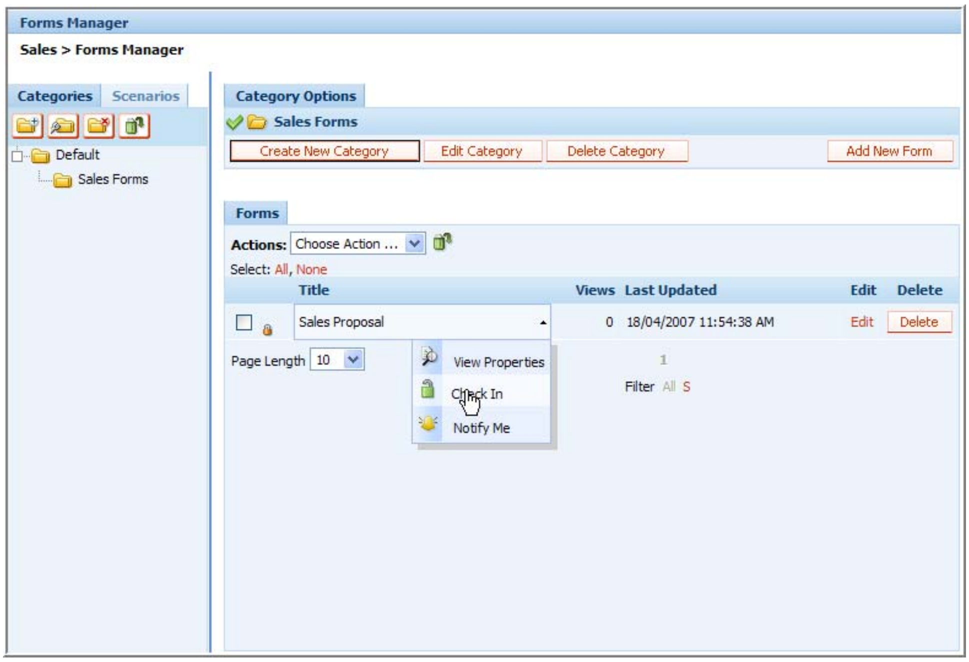
Step 5: In the Folder view click on the title of the document. Select **Check Out** from the menu that drops down.



Step 6: Click **OK** to the notification that appears

Step 7: The form will now display a padlock  in the State field to indicate that it is checked out. No other administrators/publishers will be able to upload a change to this form.

Step 8: Once you have finished uploading your changes you will need to check the form back in so that other administrators can make changes in the future. In the Folder view click on the title of the form. Select **Check In** from the menu that drops down.



Step 9: Click **OK** to the notification that appears.

Step 10: Other administrators/publishers can now upload changes to the document.

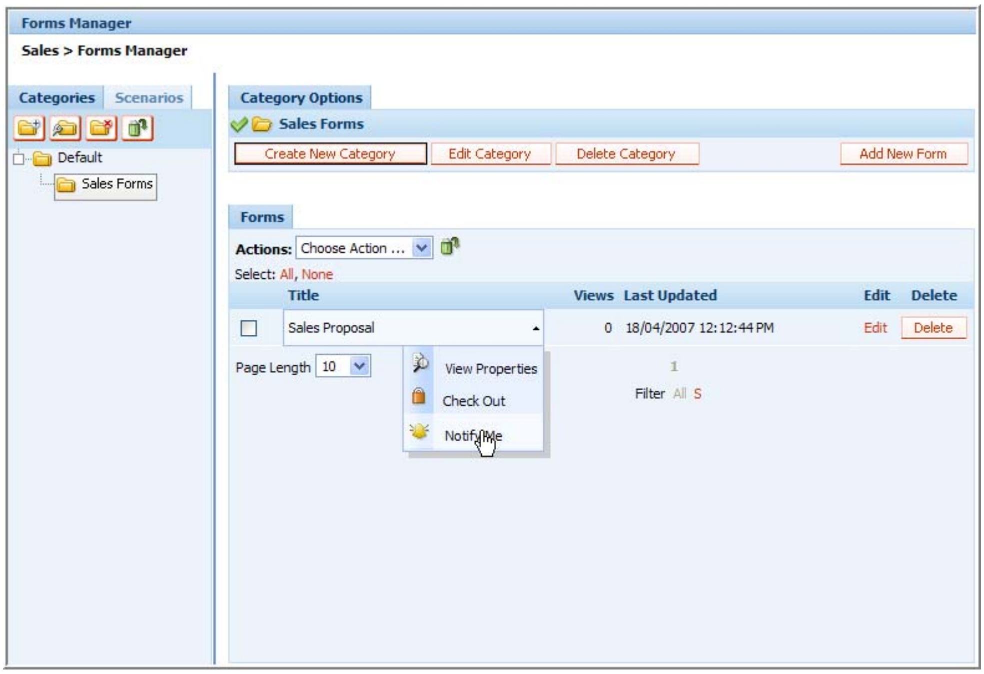
3.1.8. Document Notification

As an administrator/publisher you can choose to be notified when another administrator/publisher uploads a change to a form.

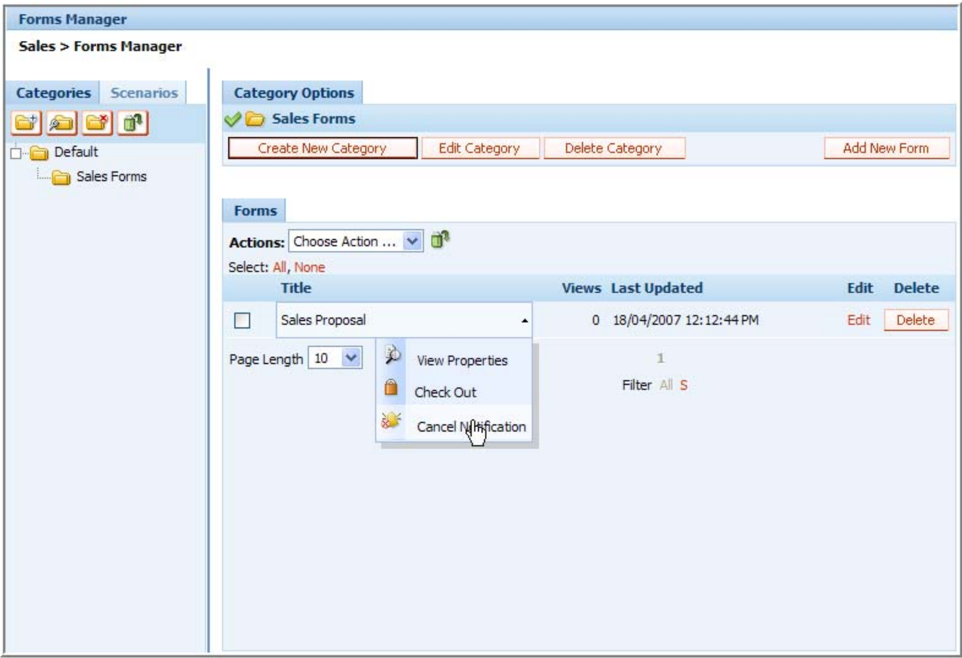
Step 5: Select **Forms Manager** from the **Forms Manager** menu for your site.

Step 6: Use the folder list to navigate to the folder in which you have previously uploaded the form

Step 7: In the Folder view click on the title of the form. Select **Notify Me** from the menu that drops down.



Step 8: Click **OK** to the notification that appears. If another administrator/publisher uploads a change to this form you will be notified via email. You can cancel the notification at any time by clicking on the title again and selecting **Cancel Notification.**

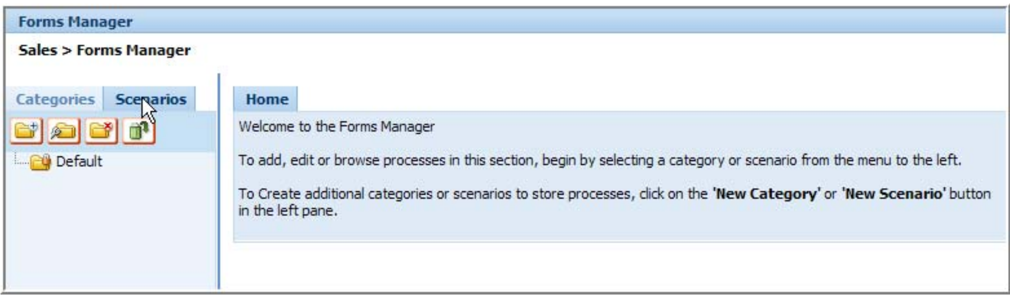


3.1.9. Using Scenarios – Adding a Scenario Group

Certain processes within organizations require that multiple forms from different areas of the business are filled out. The scenarios functionality is used to create processes for filling out multiple forms from different categories. The first step is to add a Scenario Group.

Step 1: Select **Forms Manager** from the **Forms Manager** menu for your site

Step 2: Select the **Scenarios** tab in the folder view



Step 3: Click on the  button to create a new scenario group

Step 4: On the Details screen enter a **Name** and a **Folder Name** for the new scenario group. Check the **Active** checkbox in order to make the scenario group active.

Step 5: Click **OK** to save the scenario group

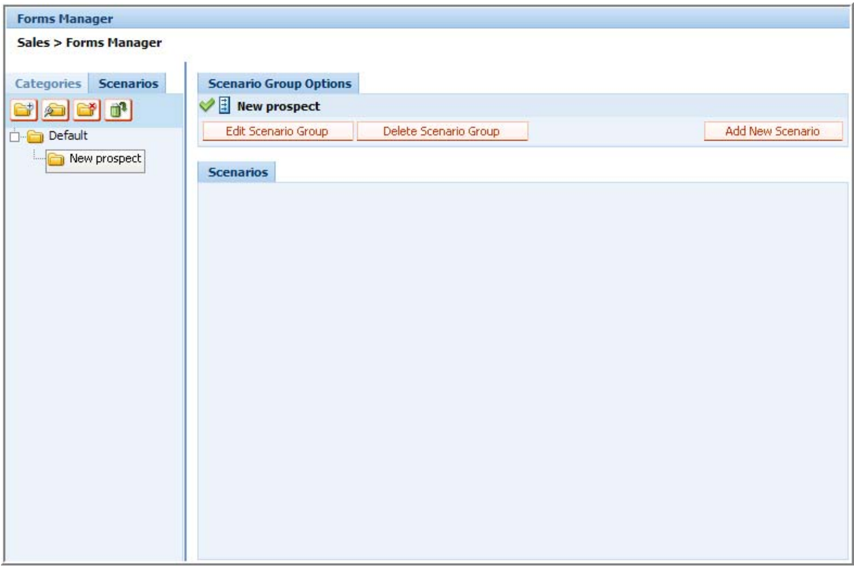
3.1.10. Using Scenarios – Adding a Scenario

A scenario group needs to exist before a scenario can be added.

Step 1: Select **Manage Forms** from the **Forms Manager** menu for your subsite.

Step 2: Select the **Scenarios** tab in the folder view and click on a scenario group that has previously been created

Step 3: In the folder view click the **Add New Scenario** button

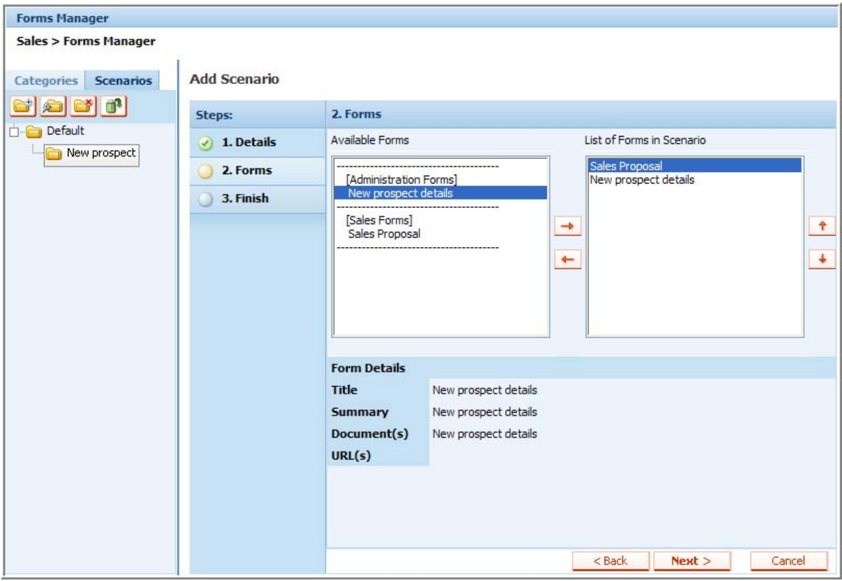


Step 4: On the **Details** screen enter a **Title, Folder Name** and **Summary** for the scenario as well as an **Owner Name** and **Owner Email**

Step 5: Click **Next** to continue

Step 6: On the **Forms** screen click on a form in the **Available Forms** section and use the horizontal arrows to add it to the scenario. Repeat this process for each of the forms you would like to add to the scenario.

Once the forms have been added you can use the vertical arrows to change the order in which the forms will appear



Step 7: Click **Next** to continue

Step 8: Click **Finish** to save the scenario

3.2. Project Space

Project Space is a front end collaboration tool that provides project groups with a secure area in which to share information. As Project Space is managed from the front end, it requires that users are authenticated before they can add or enter a Project Space. The following instructions can also be provided to your front end users as they will be using the Project Space tool.

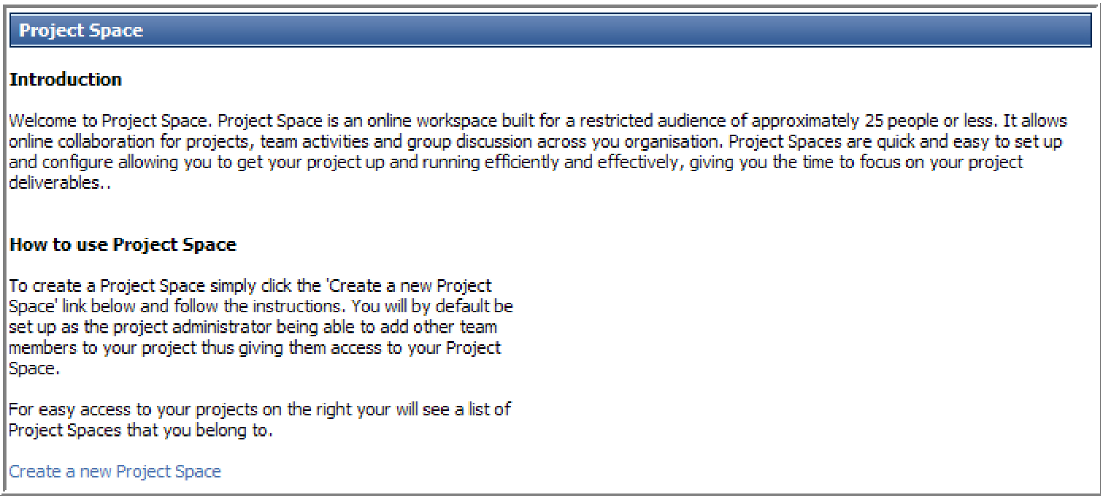
3.2.1. Creating a new Project Space

A Project Space is added from the front end of the intranet.

Step 1: Access the front end of your intranet and logon if required

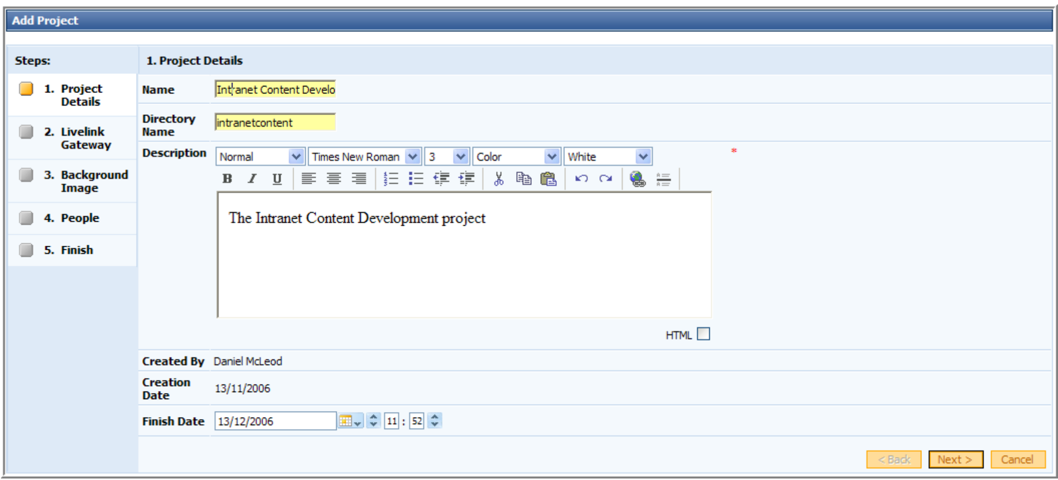
Step 2: Access **Project Space** from the Clever Tools list. If **Project Space** is not available, see the **Enabling Clever Tools** topic earlier in this guide.

Step 3: On the Introduction screen click **Create a new Project Space**



Step 4: On the **Project Details** screen enter a **Name**, **Directory Name** and **Description**.

By default the **Finish Date** is set to one month from the creation date. You can choose to change this if required.



Step 5: Click **Next** to continue

Step 6: Click **Next** to continue past the **Livelink Gateway** option. This option is only available to sites that are running integration with the Livelink document management system.

Step 7: On the **Background Image** page you can choose to upload a different background image for the project header.

Step 8: Click **Next** to continue

Step 9: The **People** screen allows you to add other members to the project. Type the person's given or last name into the **Given Name** or **Last Name** fields and click **Search**.

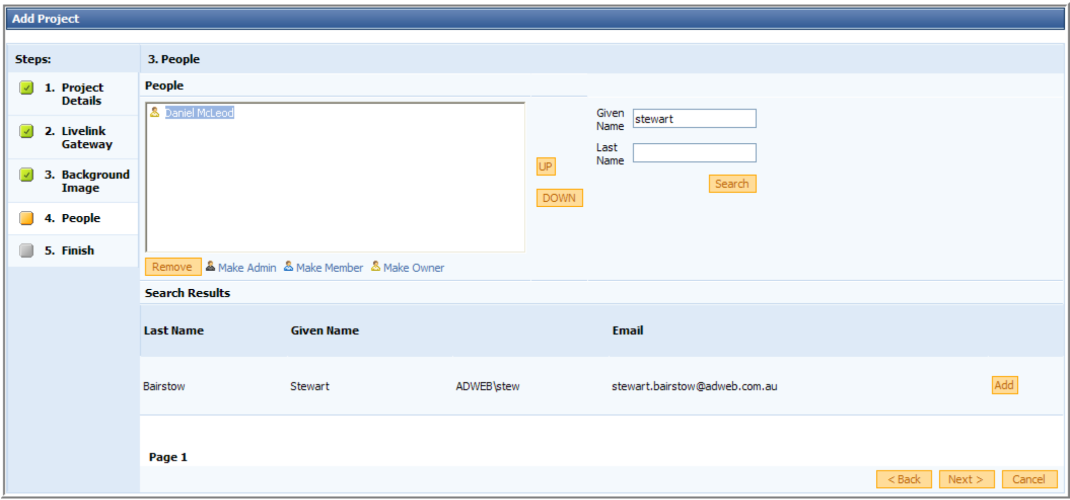
A set of **Search Results** will be returned. Click the **Add** button next to a user's details to add them to the project

There are 3 roles that can be assigned to a project member:

Member: A member can add and edit documents and information within the project but they cannot edit the project details

Admin: An administrator can edit the project details as well as adding and editing documents and information within the project

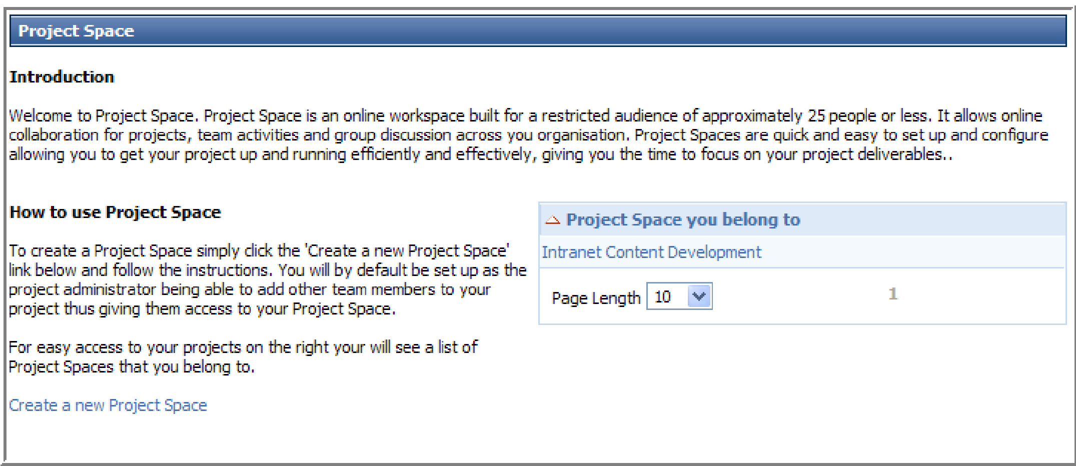
Owner: An owner can edit the project details as well as adding and editing documents and information within the project



Step 10: Click **Next** to continue

Step 11: Check that the details are correct. Click on the **Back** button to make changes to previous pages.

Step 12: Click **Finish** to save. Users that have been assigned to this project will see it on the introductory Project Space page in a list called **Project Spaces you belong to**



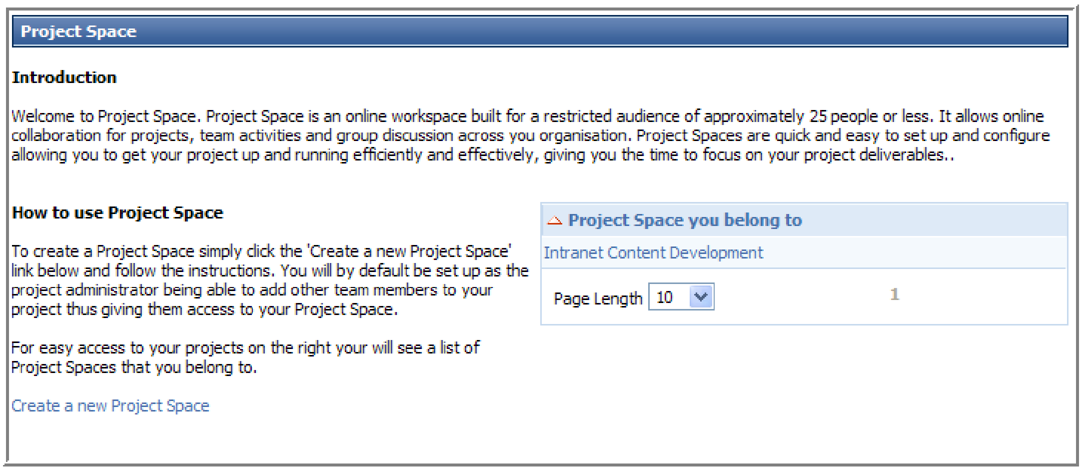
3.2.2. Adding News

Members of a project can add news articles to share information with the project team.

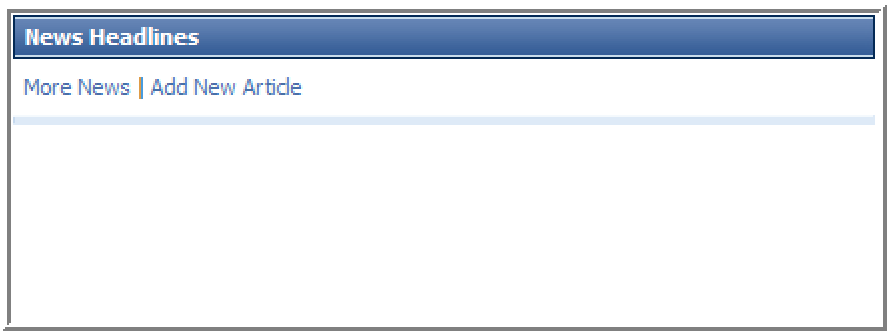
Step 1: Access the front end of your intranet and logon if required

Step 2: Access **Project Space** from the Clever Tools list.

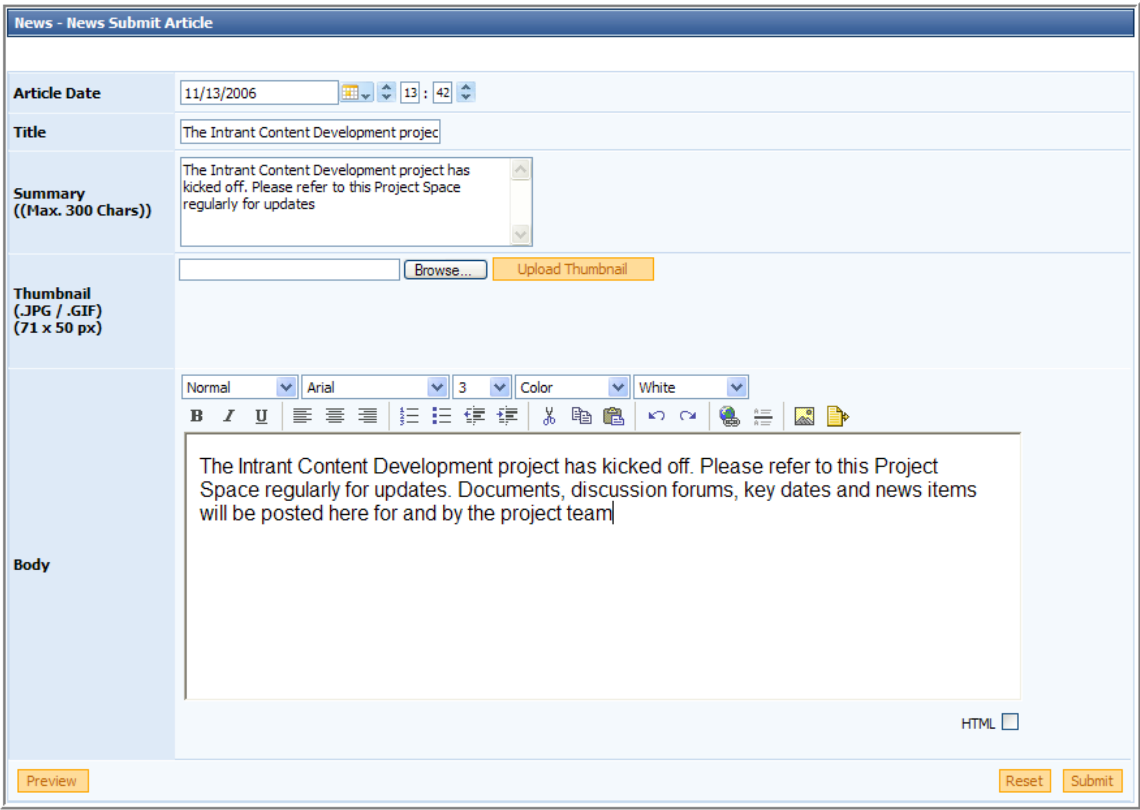
Step 3: Click on the name of the project you wish to add a news article to e.g. Intranet Content Development



Step 4: In the section of the screen titled **News Headlines** click **Add New Article**



Step 5: Enter the **Article Date**, **Title**, **Summary** and **Body** of the article. Once you are happy with the contents of the article click **Submit**



Step 6: The article will now appear in the **News Headlines** area of the Project Space.

3.2.3. Adding Calendar events

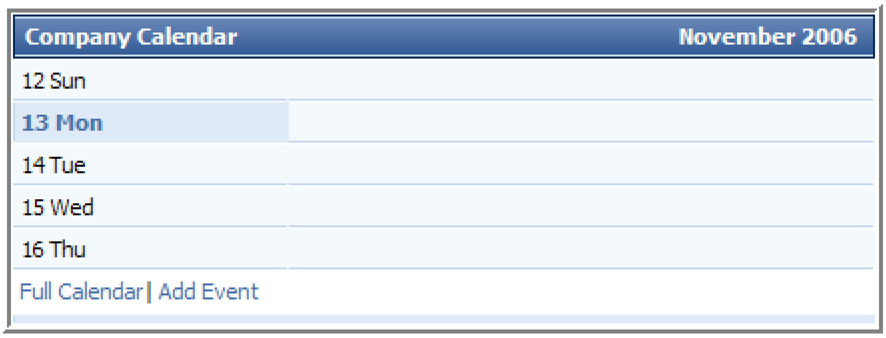
Members of a project can add events to a shared project calendar.

Step 1: Access the front end of your intranet and logon if required

Step 2: Access **Project Space** from the Clever Tools list.

Step 3: Click on the name of the project you wish to add a news article to e.g. Intranet Content Development

Step 4: In the section of the screen titled **Company Calendar** click **Add Event**



Step 5: Enter the event **Title**, **Category**, **Description** and **Date**. You can also choose to upload a file or provide a link associated with this event. Click **OK** to create the event.

Step 6: If the event is happening within the next few days it will appear in the calendar summary on the main Project Space page. Clicking on **Full Calendar** allows you to see events for past, current and future months.

3.2.4. Adding Document Folders

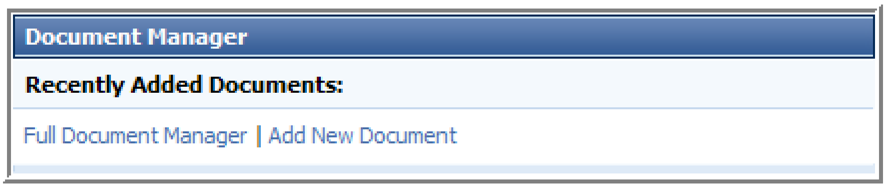
Members of a project can add documents to a shared project document manager. Before documents can be added a document folder needs to be created.

Step 1: Access the front end of your intranet and logon if required

Step 2: Access **Project Space** from the Clever Tools list.

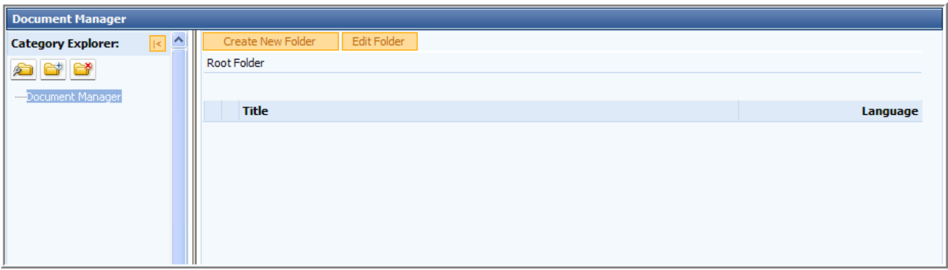
Step 3: Click on the name of the project you wish to add a news article to e.g. Intranet Content Development

Step 4: In the section of the screen titled **Document Manager** click **Full Document Manager**



Step 5: If you wish to create a subfolder select the root folder that you would like to create the subfolder within. The root folder of the whole application is called **Document Manager**.

Step 6: Click **Create New Folder**



Step 7: Enter the **Name**, **Folder Name** and a **Description** of the folder. Click **Finish** to create the folder. The folder should now appear in the Category Explorer on the Full Document Manager screen.

3.2.5. Adding Documents

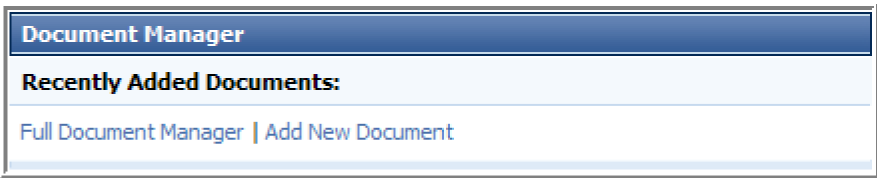
Members of a project can add documents to a shared project document manager. Before documents can be added a document folder needs to be created.

Step 1: Access the front end of your intranet and logon if required

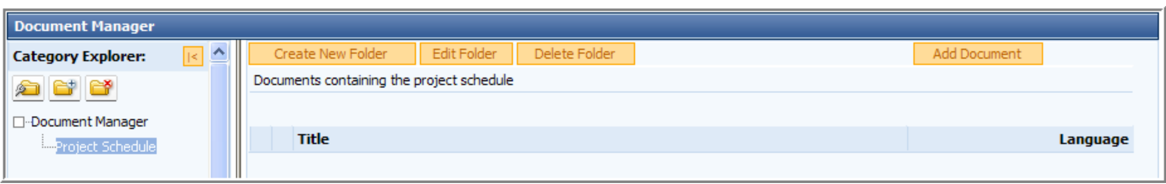
Step 2: Access **Project Space** from the Clever Tools list.

Step 3: Click on the name of the project you wish to add a news article to e.g. Intranet Content Development

Step 4: In the section of the screen titled **Document Manager** click **Add New Document**



Step 5: Select the folder in which you wish to create the document and click the **Add Document** button



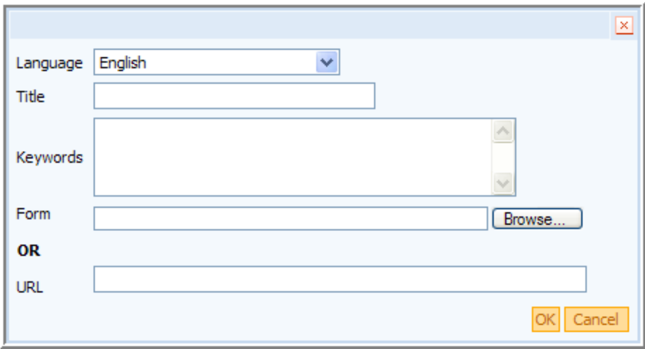
Step 6: Enter a **Title, URL Path, Description** and **Keywords** for the document

You can also choose when the document becomes visible, when it expires and if you wish to be notified before it expires. By default the document is immediately visible and does not expire.

Step 7: Tick the boxes corresponding to the folder(s) you would like to add the file to.

Step 8: Click **Next** to continue.

Step 9: Click on **Add Document**. Select the **Language** of the document, enter the **Title, Keywords** and either click **Browse** and locate the document, or enter a website address. Click **OK**.



Step 10: Repeat this process to add the document in other languages.

Step 11: Enter any **Additional Information** for the document on the **More Info** screen.

Step 12: Click **Next** to continue.

Step 13: If required, attach links to other documents using the **Add Bibliography** option

Step 14: Click **Finish** to save

3.2.6. Managing your Forum profile

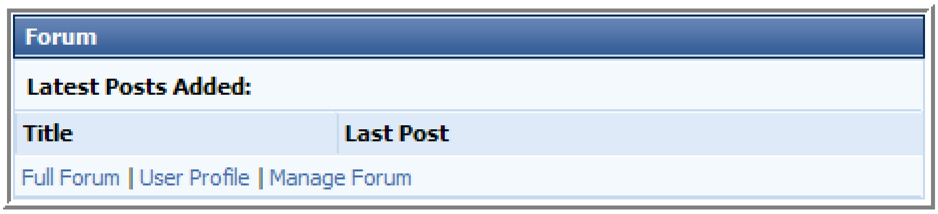
Members of a project can collaborate via a project forum. Before doing so, members can configure their forum profile.

Step 1: Access the front end of your intranet and logon if required

Step 2: Access **Project Space** from the Clever Tools list.

Step 3: Click on the name of the project you wish to add a news article to e.g. Intranet Content Development

Step 4: In the section of the screen titled **Forum** click **User Profile**



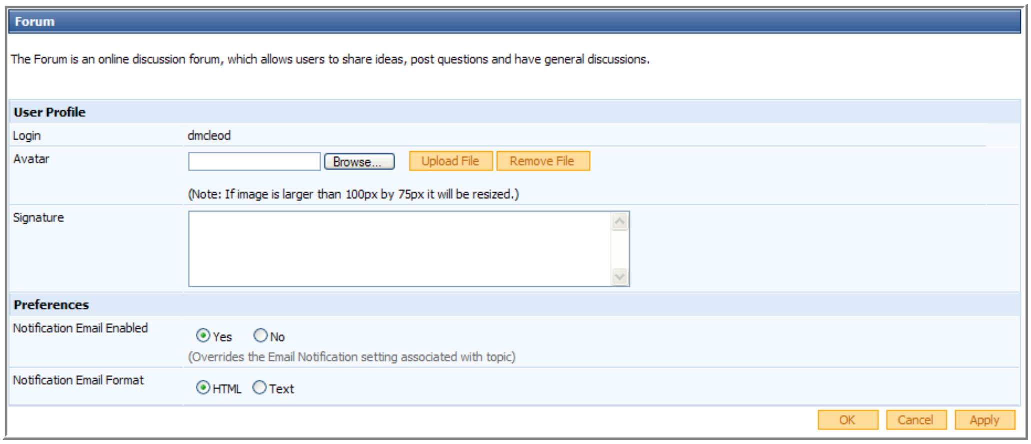
Step 5: Changes to not have to be made; however you can choose to configure the following:

Avatar: Allows you to upload an image that will appear next to your forum posts. E.g. a picture of yourself

Signature: Default text that will appear at the bottom of your forum posts

Notification Email Enabled: Whether you wish to enable to receipt of notification emails. If this is enabled you can choose to be notified via email if one of your forum posts is replied to. **NOTE**: if this is not enabled you will not receive a notification even if you check the Notification box for a forum post.

Notification Email Format: The format of the notification emails that will be sent



Step 6: Once you have updated your User Profile, click **OK** to save the changes

3.2.7. Adding Forum Topics

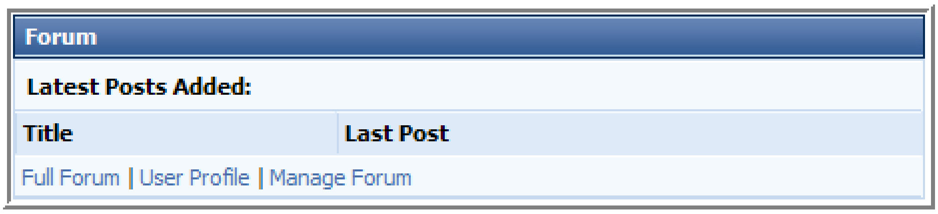
Members of a project can collaborate via a project forum.

Step 1: Access the front end of your intranet and logon if required

Step 2: Access **Project Space** from the Clever Tools list.

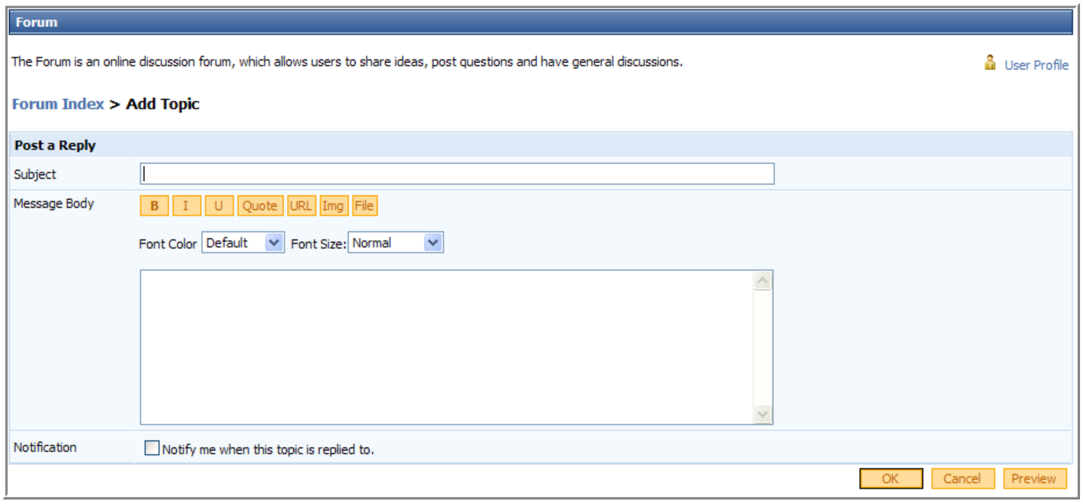
Step 3: Click on the name of the project you wish to add a news article to e.g. Intranet Content Development

Step 4: In the section of the screen titled **Forum** click **Full Forum**



Step 5: Click the **New Topic** button to add a new forum topic. If a topic already exists, you can reply to it be clicking the **Reply** button.

Step 6: Enter a **Subject** and a **Message Body**. Check the **Notification** check box if you would like to receive an email when this forum topic is replied to. **NOTE**: you need to have enabled notification emails in you forum user profile in order to receive emails. See the **Managing your Forum Profile** topic for further information.



Step 7: Click **Preview** to see a preview of your post. Click **OK** to save your post

3.2.8. Adding Quicklinks

Members of a project can create Quick Links to online, project related resources.

Step 1: Access the front end of your intranet and logon if required

Step 2: Access **Project Space** from the Clever Tools list.

Step 3: Click on the name of the project you wish to add a news article to e.g. Intranet Content Development

Step 4: Click **Add Quicklinks** on the right hand side of the screen

Step 5: Enter the **Name** and **URL** of the Quick Link. In the Link Location option you can choose whether the link should appear in a list of a drop down on the Project Space interface.

Step 6: Click **Next** to continue

Step 7: Choose the **Opening Method** of the Quick Link.

Blank Window: The link will open in a new browser window. This is best for links to websites that are external to the intranet

Javascript Popup: The link will open in a popup window

Current Window: The link will open in the current browser window. This is best for links to pages, documents that are internal to the intranet.

Step 8: Click **Next** to continue

Step 9: Click **Finish** to save. The Quick Link should now appear on the right hand side of the main page of the project.

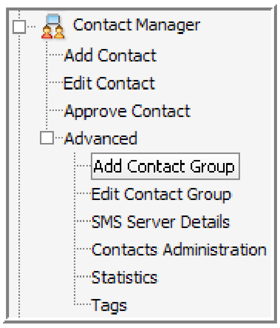
3.3. Contact Manager

The Contact Manager is a tool that can be used to create, browse and search a set of shared and personal contacts. Shared contacts are available to all permitted users from the front end and can be added from the Admin system or from the front end (if enabled). Personal contacts are added from the front end by front end users and are only available to the front end user who added the contact.

3.3.1. Setting up Shared Contact Groups

Before shared contacts can be added, contact groups need to be established.

Step 1: Select **Advanced > Add Contact Group** from the **Contact Manager** menu for your site



Step 2: Add a **Name** and a **Description** for the Contact Group. Check the **Active** box to make the group visible at the front end.

Check the **Allow Front End Submission** box to allow users to submit contacts to this group at the front end

Check the **Approval Required** box to require administrative approval before contacts that are submitted from the front end appear in shared contact groups

Step 3: Click **Next** to continue

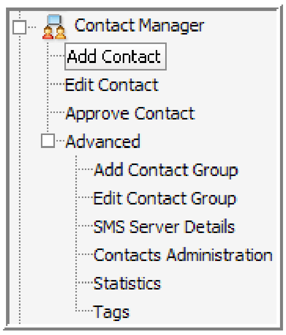
Step 4: If required, use the **Security** screen to modify which intranet website users you would like to be able to access this group. As the default, access shall be available to all users.

Step 5: Click **Next** to continue

Step 6: Click **Finish** to save to contact group

3.3.2. Adding Shared Group Contacts

Step 1: Select **Add Contact** from the **Contact Manager** menu for your site



Step 2: You can choose to search for and import user data from your repository of website users (this can be details stored in Intranet DASHBOARD or in Active Directory). This step is optional.

Step 3: Click **Next** to continue

Step 4: Choose the **Contact Group(s)** that the contact should be stored in. You can choose to add a new group from this screen if required

Step 5: Click **Next** to continue

Step 6: Fill in the contact's **Personal Details** (not all details are compulsory)

Step 7: Click **Next** to continue

Step 8: Fill in the contact's **Contact Details** (not all details are compulsory)

Step 9: Click **Next** to continue

Step 10: Fill in the contact's **Work Details** (not all details are compulsory)

Step 11: Click **Next** to continue

Step 12: On the **Display Details** screen you can choose to set the **Contact Priority Level**, a **Tag** (see below for information on adding tags), and upload an **Image** of the contact if one is available. Check the **Approve** box for the contact to appear at the front end.

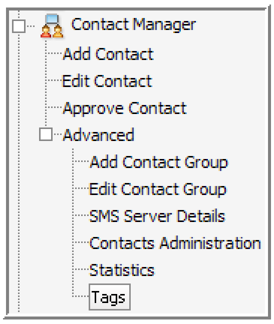
Step 13: Click **Next** to continue

Step 14: Confirm that the details are correct and click **Finish** to save the contact

3.3.3. Adding and using tags

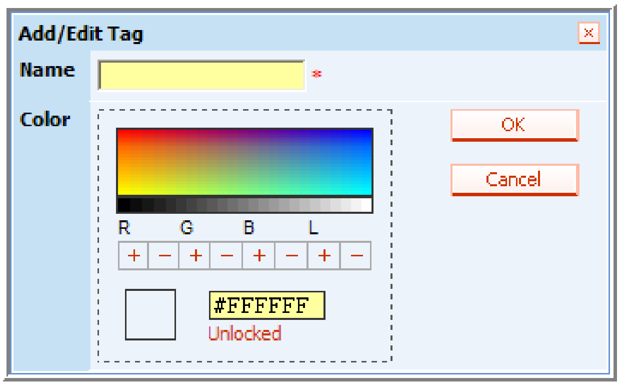
Tags provide the opportunity to provide cross category groupings of contacts. For example, you may use tags to identify the fire wardens in each department.

Step 1: Select **Advanced > Tags** from the **Contact Manager** menu for your site



Step 2: Click the **Add Tag** button

Step 3: On the **Add/Edit Tag** screen give the tag a **Name**, and a **Color** that will appear at the front end



Step 4: Click **OK** to save the Tag and return to the Tags screen

4. Collaboration/Communication Tools

4.1. Quick Links

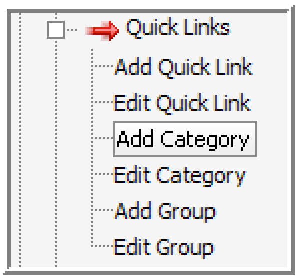
Quick Links is a tool that allows for the creation of lists of links that can be included in the layout of a site. These links can be to external resources or to pages/applications within the intranet.

Individual Quick Links are stored within Groups, and Groups are stored within Categories.

4.1.1. Adding Quick Link Categories

Before groups of Quick Links can be created, at least one category needs to be created.

Step 1: Select **Add Category** from the **Quick Links** menu for your site



Step 2: Enter a **Name** and **Description** for your category (e.g. External Links). Check the **Active** box to make the category active

Step 3: Click **Next** to continue

Step 4: The **Permissions** screen is displayed. If required, modify which admin users should be allowed to amend this category.

Step 5: Click **Next** to continue

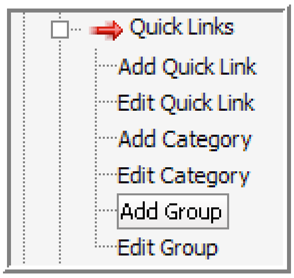
Step 6: Check that the details are correct. Click on the **Back** button to make changes to previous pages.

Step 7: Click **Finish** to save

4.1.2. Adding Quick Link Groups

Before individual Quick Links can be created, at least one group needs to be created and added to a category.

Step 1: Select **Add Group** from the **Quick Links** menu for your site



Step 2: Enter a **Name** and **Description** for your Group (e.g. Company Websites). Select a **Category** for this group to reside in, check the **Active** box for the group to be available for use, and check the **Is In Layout** box if you wish the group to be available to be included in the layout of your site.

If this is the first group created the **Default** check box will be selected automatically. If there are other groups you can choose to make this the default group.

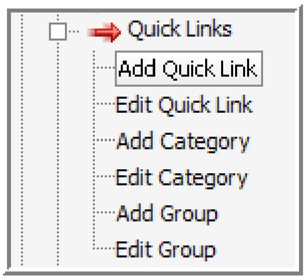
Step 3: Click **Next** to continue

Step 4: Check that the details are correct. Click on the **Back** button to make changes to previous pages.

Step 5: Click **Finish** to save

4.1.3. Adding Quick Links

Step 1: Select **Add Quick Link** from the **Quick Links** menu for your site



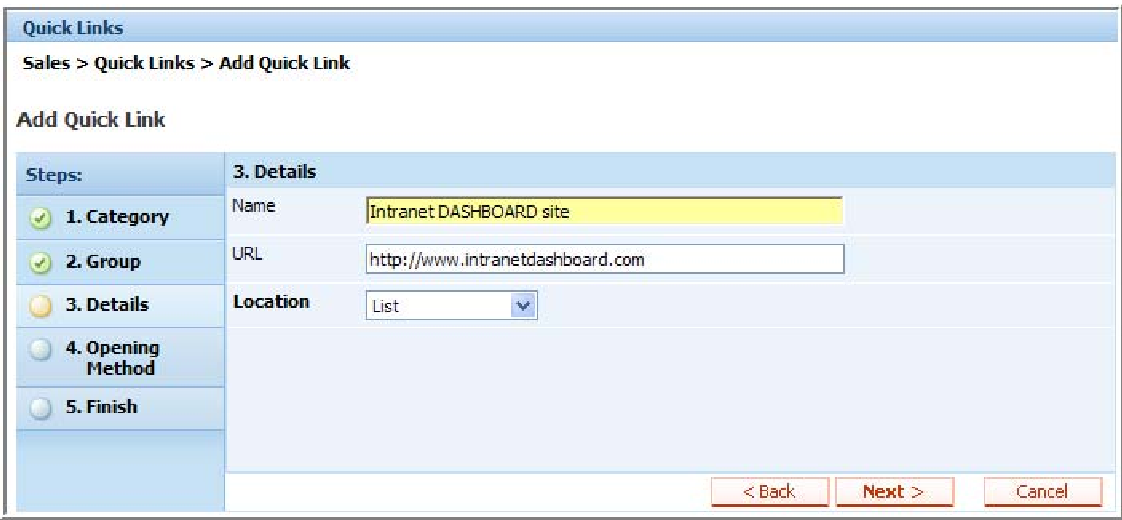
Step 2: Select a previously created **Category** for this **Quick Link**

Step 3: Click **Next** to continue

Step 4: Select a previously created **Group** for this **Quick Link**

Step 5: Enter a **Name** for the link and provide the full **URL**. Choose the **Location** of the link:

- In a **List** of links
- In a **Drop Down** menu



Step 6: Click **Next** to continue

Step 7: Select the **Open Method** for the link:

- **Blank Window:** The link will open in a new browser window when clicked
- **Javascript Popup**: The link will open in a popup window when clicked
- **Current Window**: The link will open in the current browser window when clicked i.e. it will replace the page that is displayed

Step 8: Check that the details are correct. Click on the **Back** button to make changes to previous pages.

Step 9: Click **Finish** to save

4.1.4. Including Quick Link Groups in a site's layout

Once Quick Links have been created they can be included in the layout of a site in order to make them accessible to end users.

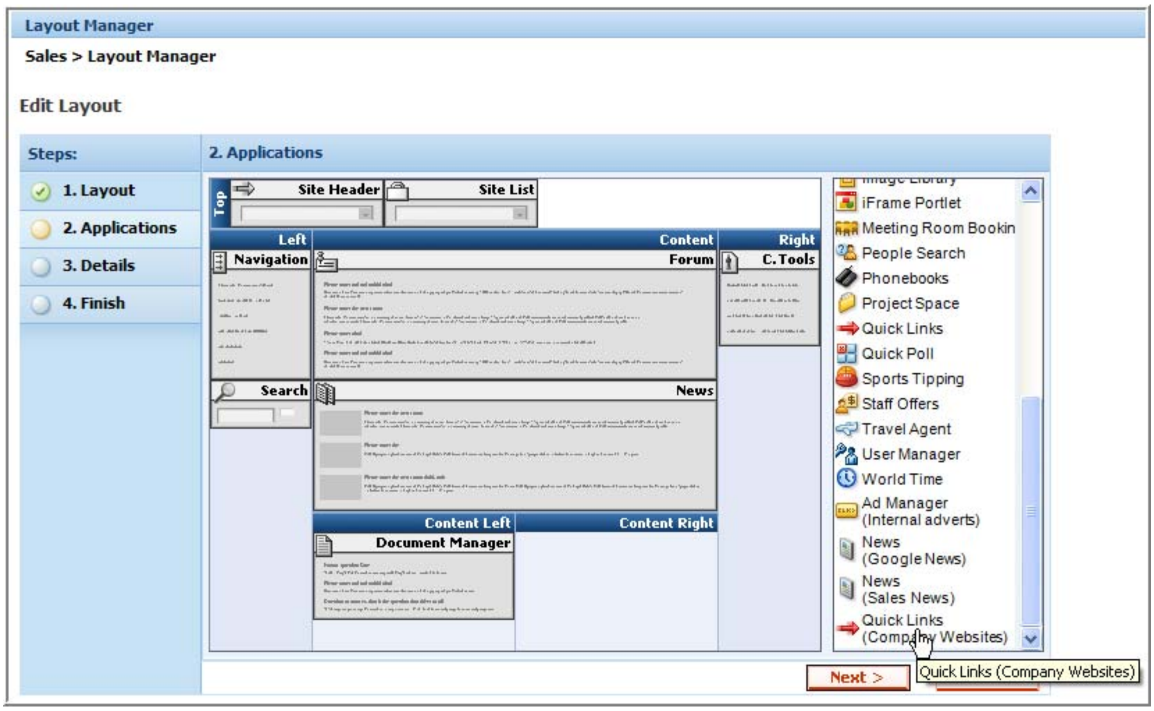
Step 1: Ensure that the **Is In Layout** checkbox was checked when adding the Quick Link Group

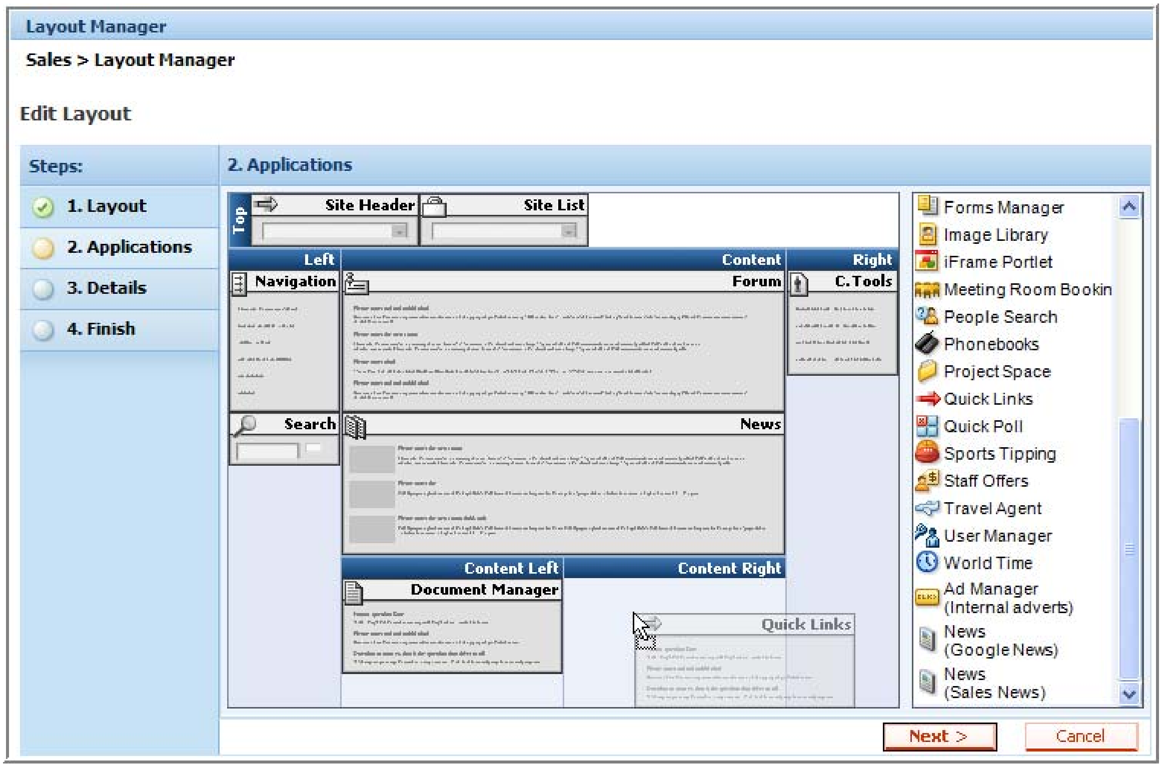
Step 2: Select **Edit Layout** from the **Layout Manager** menu for your site

Step 3: Click on the image of the layout that is to be edited (usually the layout that is marked as **Active**)

Step 4: The layout of the site will be displayed. Scroll to the bottom of the **Applications** list on the right hand side of the screen. Near the bottom of the list will be an additional **Quick Links** application with the name of the group you created earlier in brackets (e.g. Company Websites).

Click and drag the additional **Quick Links** application into the place in the layout where it should appear.





Step 5: Click **Next** to continue

Step 6: Ensure that the **Make Active** checkbox is checked

Step 7: Click **Next** to continue

Step 8: Click **Finish** to save the changes. The front end layout for the site will now display the group of Quick Links in the chosen position.

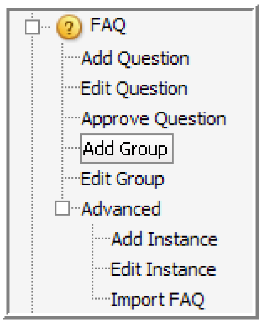
4.2. FAQ

The FAQ tool allows for the creation of groups of frequently asked questions and their answers. The tool also provides the ability to enable front end users to submit questions, rate questions and provide feedback on questions. Essentially, the FAQ tool can be used to establish a knowledge base on a range of topics.

4.2.1. Adding an FAQ Group

Before frequently asked questions and their answers can be established, groups need to be created in which to store the questions.

Step 1: Select **Add Group** from the **FAQ** menu for your site



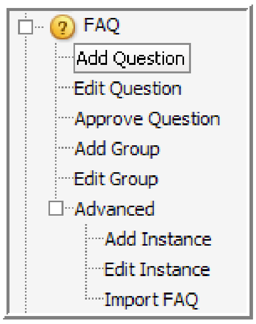
Step 2: Enter the **Group Name** and check the **Group Active** box to allow the group to be seen at the front end. If the **Shared** box is checked this group can be used in other subsites as well.

Step 3: Click **Next** to continue

Step 4: Confirm that the details are correct and click **Finish** to save

4.2.2. Adding Questions

Step 1: Select **Add Question** from the **FAQ** menu for your site



Step 2: Select the previously created **FAQ Group** in which the question should be stored

Step 3: Click **Next** to continue

Step 4: Write the **Question** and **Answer**. Note: the Answer field is a Rich Text field that allows for the formatting of text and the inclusion of links, files and images.

Step 5: Click **Next** to continue

Step 6: Check the **Approve** checkbox if you want to approve the question now. If you do not tick this checkbox, the question will not be accessible from the intranet front end until it is approved.

Select the **Publish to Instances** checkbox if you would like to submit this question to all instances containing any questions from the selected group. Please refer to the section below on **Setting up an FAQ Instance** for an overview of FAQ Instances.

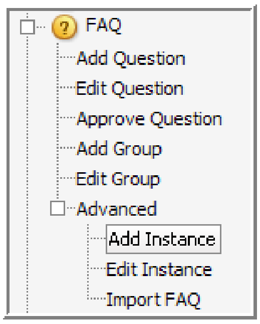
Step 7: Click **Next** to continue

Step 8: Confirm that the details are correct and click **Finish** to save

4.2.3. Setting up an FAQ Instance

Once groups and questions have been established, FAQ Instances need to be created to display the questions at the front end of your intranet.

Step 1: Select **Advanced > Add Instance** from the **FAQ** menu for your site



Step 2: Add a **Name**, **URL Path** (the address of the instance) and **Description** for your FAQ Instance.

An **Owner** and **Owner Email** are also required so that front end users have a contact if they have any further questions relating to the instance.

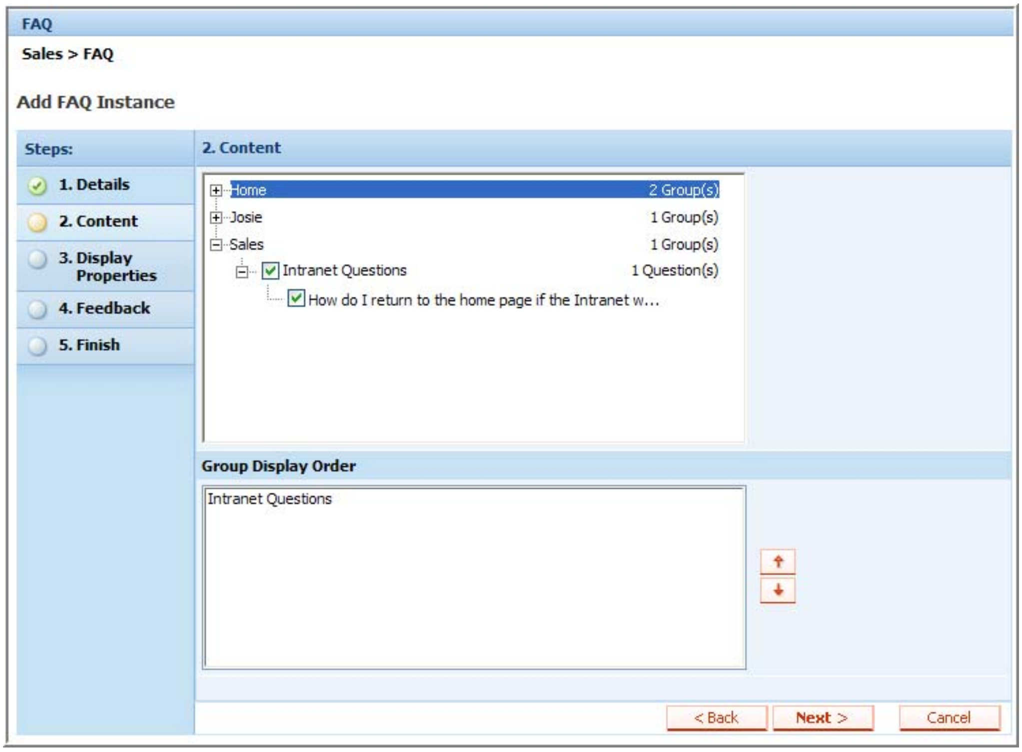
Check the **Active** box to allow the instance to be seen at the front end.

Tick the **Default Instance** checkbox to make this instance the default. In layout manager, each instance with layout manager integration exists separately in the application list. The application "FAQ" also exists on its own. The instance that is displayed when "FAQ" is on the layout is the **Default Instance**. You can change the **Default Instance** at any time by selecting the default instance checkbox. Note that any instance previously selected as the default will be updated accordingly.

Tick the **Layout manager integration** if you would like this instance to appear in the application list in layout manager. This will allow you to easily place this instance on the intranet website. If you do not select this checkbox, the instance will still be accessible through linking to it from another application or page.

Step 3: On the **Content** page you can choose the previously created groups and questions that should appear in this instance. You will also be able to choose from groups that have been shared from other sites. Groups and questions can be included in multiple FAQ Instances.

In the **Group Display Order** section you can specify the order in which the chosen groups will appear on the screen



Step 4: Click **Next** to continue

Step 5: On the **Display Properties** screen you can specify how the FAQs should display for this instance.

Check the **Expand Questions and Answers** checkbox to show the answers when a user first accesses the page. If this box is unchecked, front end users will need to click on the question in order to expand the answer.

Check the **Allow Front End Submission** checkbox to allow front end users to submit questions from the intranet website. Note that these questions will need to be approved through the administration system before they become accessible from the intranet website.

Select the order in which questions should **Sort.**

Step 6: Click **Next** to continue

Step 7: On the **Feedback** screen you can choose to allow front end users to vote on the usefulness of questions and provide comments as feedback by checking the **Allow Voting** and **Allow Comments boxes**.

Step 8: Click **Next** to continue

Step 9: Confirm that the details are correct and click **Finish** to save

4.2.4. Including an FAQ Instance in the layout of a site

Once an FAQ Instance has been created it can be included in the layout of a site in order to make it accessible to end users.

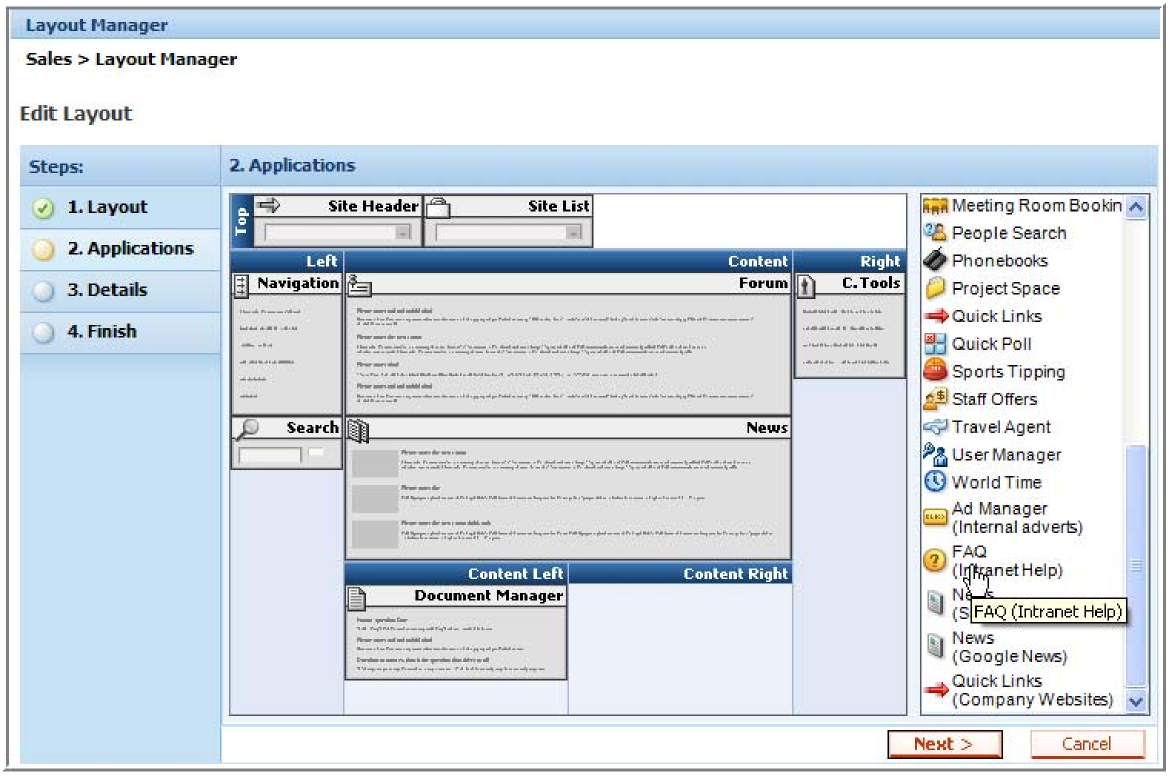
Step 1: Ensure that the **Layout manager integration** checkbox was checked when adding the FAQ Instance

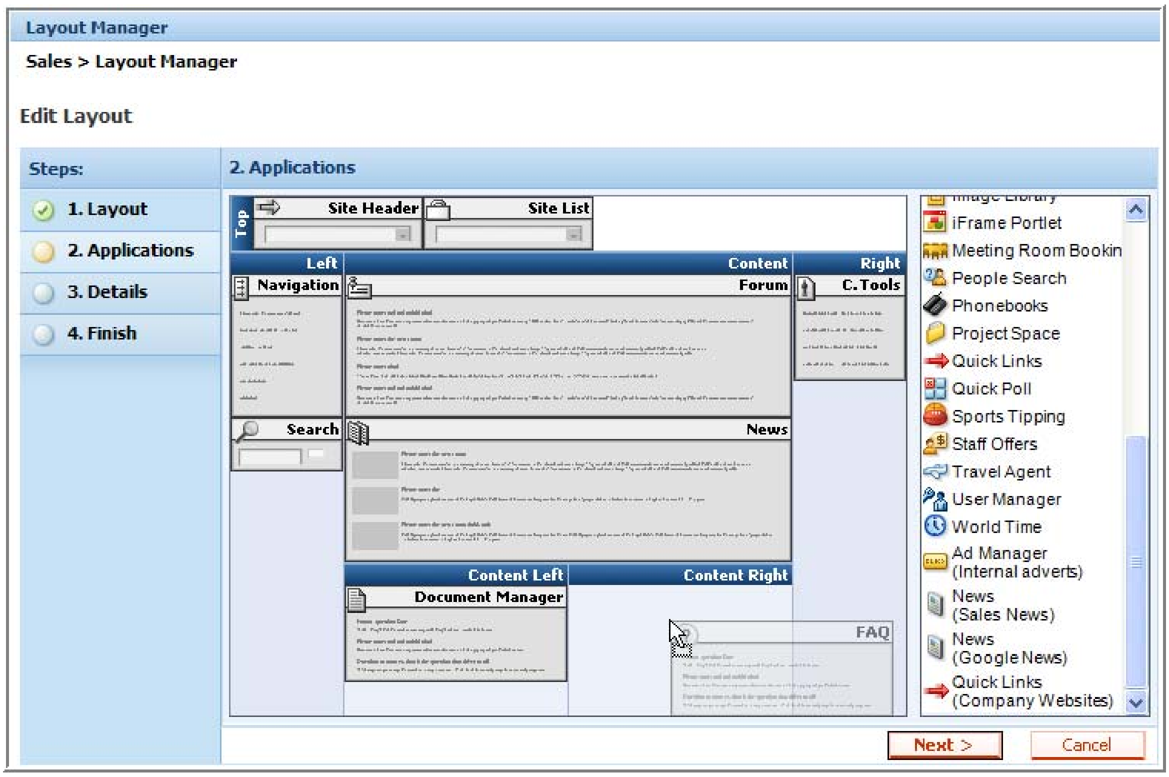
Step 2: Select **Edit Layout** from the **Layout Manager** menu for your site

Step 3: Click on the image of the layout that is to be edited (usually the layout that is marked as **Active**)

Step 4: The layout of the site will be displayed. Scroll to the bottom of the **Applications** list on the right hand side of the screen. Near the bottom of the list will be an additional **FAQ** application with the name of the group you created earlier in brackets (e.g. Company Websites).

Click and drag the additional **Quick Links** application into the place in the layout where it should appear.





Step 5: Click **Next** to continue

Step 6: Ensure that the **Make Active** checkbox is checked

Step 7: Click **Next** to continue

Step 8: Click **Finish** to save the changes. The front end layout for the site will now display the FAQ Instance in the chosen position.

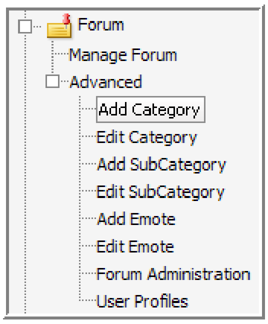
4.3. Forum

The Forum application allows front end users to communicate with each other by posting news topics or replying to existing topics. Topics are stored in categories that need to be established through the administration system of Intranet DASHBOARD. Administrators can set a range of configuration options on categories and alter a range of overall administration options.

4.3.1. Adding Forum Categories

In order to allow front end users to post and reply to topics, categories and sub-categories need to be established in which to store the topics.

Step 1: Select **Advanced > Add Category** from the **Forum** menu for your site



Step 2: Enter a **Name**, **Folder Name** (this will form part of the URL for the forum category) and a **Description** for the category. Check the **Active** box to allow front end users to see the category.

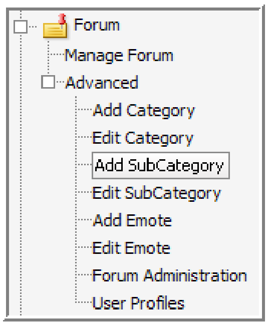
Step 3: Click **Next** to continue

Step 4: Click **Finish** to save the changes

4.3.2. Adding Forum SubCategories

Now that an upper level category has been established, there is a need to create sub-categories in which to store the actual topics.

Step 1: Select **Advanced > Add SubCategory** from the **Forum** menu for your site



Step 2: Select the **Category** in which to store the **SubCategory**

Step 3: Click **Next** to continue

Step 4: Enter a **Name**, **Folder Name** (this will form part of the URL for the forum category) and a **Description** for the SubCategory. Check the **Active** box to allow front end users to see the SubCategory.

Step 5: Click **Next** to continue

Step 6: Enter details that will appear in the **Header** of the screen for this SubCategory when a user accesses it from the front end

Step 7: Click **Next** to continue

Step 8: Check the boxes on the **Permissions** screen to set the permissions on the SubCategory

- Check the **View** box if you want to allow intranet website users to view the topics within the subcategory. If unchecked, users will be able to view the subcategory name and description but be unable to view the topics contained within it.
- Check the **Read** box if you want to allow users to view topics and messages within the subcategory. If unchecked, users will be able to view the details of each topic contained within the subcategory, but not the messages.
- Check the **Reply** box if you want to allow users to reply to messages contained within the subcategory.
- Check the **Edit Own** box if you want to allow users to edit their own messages contained within the subcategory.
- Check the **Delete Own** box if you want to allow users to delete their own messages contained within the subcategory.
- Check the **Allow Sticky Topics** box if you want to allow forum administrators to post sticky topics within the subcategory.
- Check the **Allow Announcements** box if you want to allow forum administrators to post Announcements within the subcategory.

Step 9: Click **Next** to continue

Step 10: The **Security** screen is displayed. If required, modify which intranet website users you would like to be able to access this SubCategory. As the default, access shall be available to all users.

Step 11: Click **Next** to continue

Step 12: Confirm that the details are correct and click **Finish** to save

4.3.3. Forum Administration

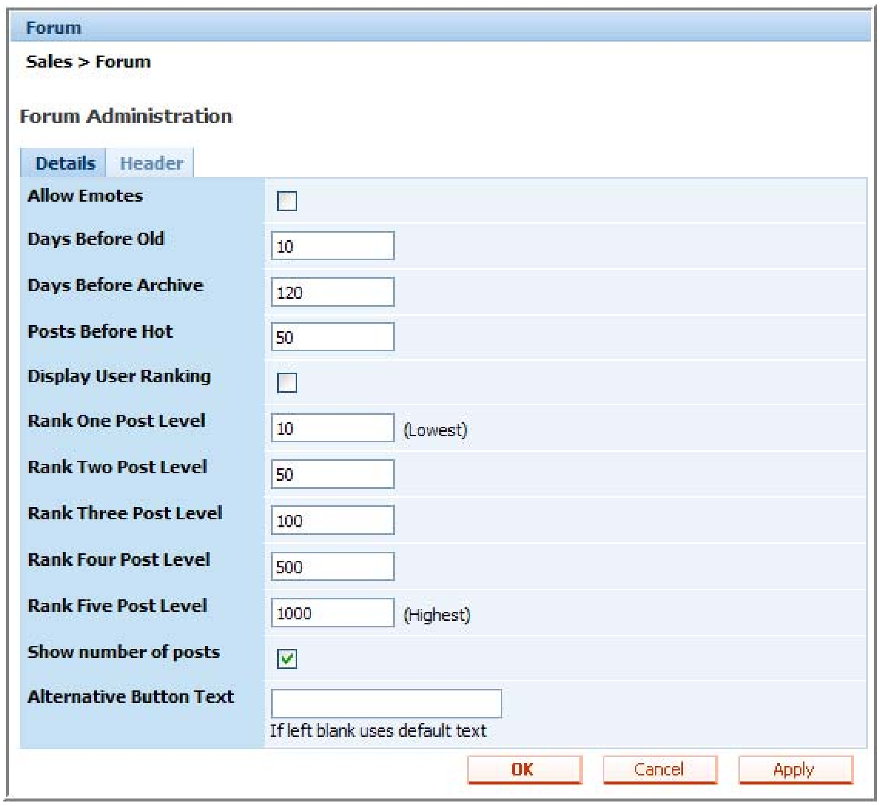
Now that categories and subcategories are created to allow front end users to add topics, Administrators may also wish to configure the way the forum is administered.

Step 1: Select **Advanced > Forum Administration** from the **Forum** menu for your site

Step 2: On the **Details** tab screen you can set an number of administration options:

- Check the **Allow Emotes** box if you want to allow emotes to be added to forum messages. An example of an emote is 
- The **Days Before Old** value defines how many days it takes from a topic first being posted until it is set as old (The topic will display as new until that time). An "Old" topic will display with a grey folder icon before it.
- The **Days Before Archive** value defines how many days it takes from a topic first being posted until it is set as archived (The topic is no longer viewable on the intranet website).
- The **Posts Before Hot** value defines how many message posts it takes for a topic to be set as hot. A "Hot" topic will display a yellow folder icon with a flame before it.
- Check the **Display User Ranking** box if you want to show a forum users ranking to the side of each message post (The ranking is based on a 5 star system, 1 star being the lowest and 5 stars being the highest).

- The **Rank One Post Level** value defines how many message posts a forum user must make in order to obtain a rank one post level.
- The **Rank Two Post Level** value defines how many message posts a forum user must make in order to obtain a rank two post level.
- The **Rank Three Post Level** value defines how many message posts a forum user must make in order to obtain a rank three post level.
- The **Rank Four Post Level** value defines how many message posts a forum user must make in order to obtain a rank four post level.
- The **Rank Five Post Level** value defines how many message posts a forum user must make in order to obtain a rank five post level.
- Check the **Show number of posts** box if you want to show the number of posts that a user has contributed to the forum
- Enter **Alternate Button Text** if you want to change the text that displays on the button that allows users to add a new topic. If this is left blank the default text 'New Topic' will display for the button



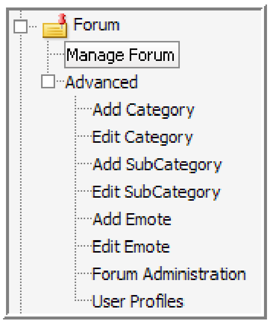
Step 3: On the **Header** tab screen you can enter text that appears on the initial forum index page on the front end of your site. It can be used to describe the use of the forum tool.

Step 4: Click **OK** to save your changes

4.3.4. Adding Forum Posts

Although the forum is aimed at providing an area for front end users to communicate and collaborate, Administrators of the system can also post and reply to topics.

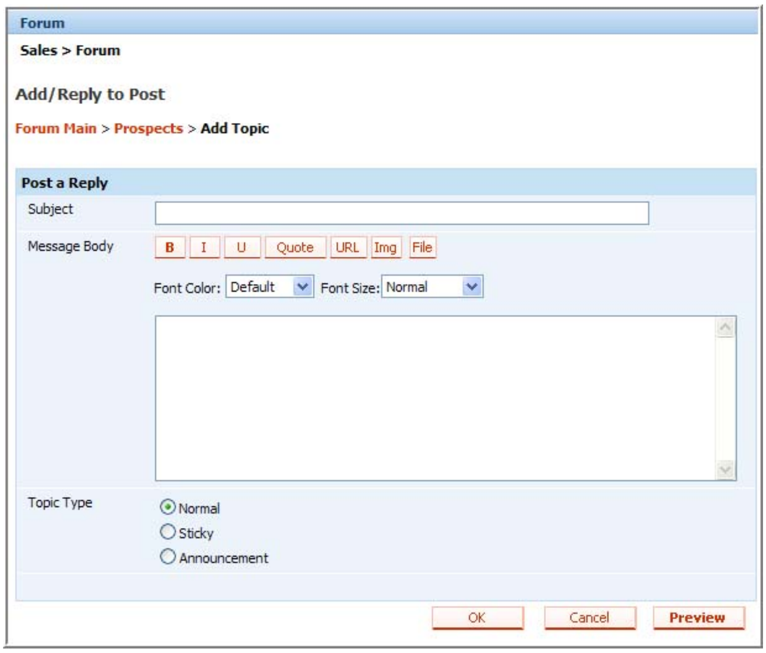
Step 1: Select **Manage Forum** from the **Forum** menu for your site



Step 2: A list of Categories and SubCategories will be displayed

Step 3: Click **Create Topic** next to the SubCategory that you wish to add a topic to

Step 4: Add a **Subject** and a **Message Body**



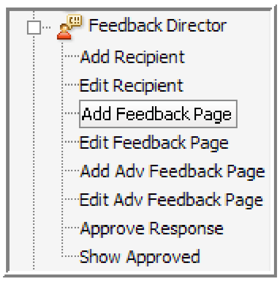
Step 5: Click **OK** to save the topic

4.4. Feedback Director

The Feedback Director application allows you to create simple or advanced online forms for front end users to submit information. This guide will take you through creating basic feedback director pages; please see the **Help** for information on using the Advanced Feedback Director features to created advanced online forms.

4.4.1. Adding a Feedback Page

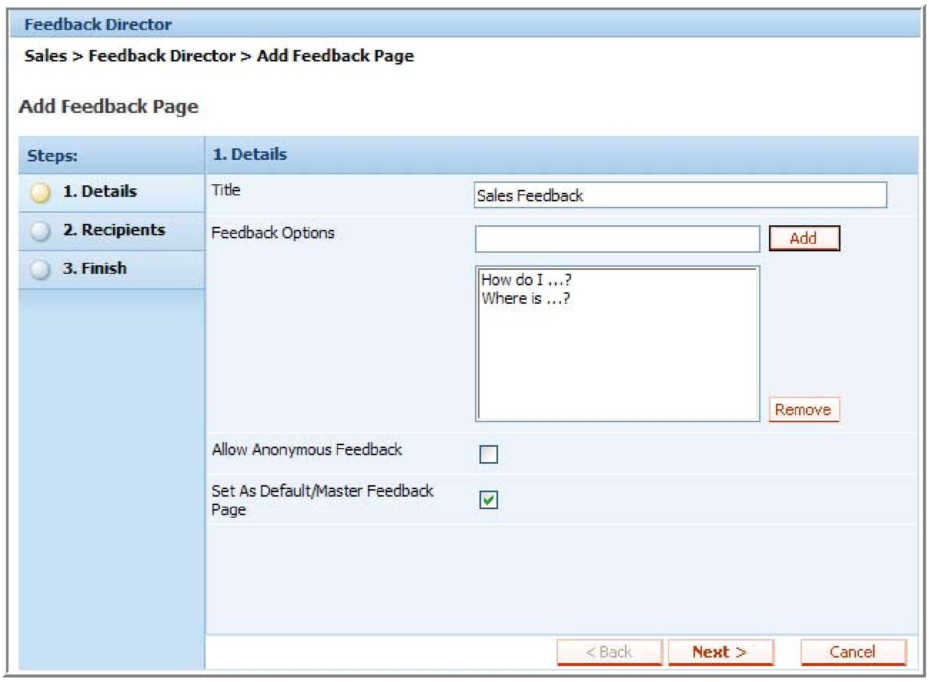
Step 1: Select **Add Feedback Page** from the **Feedback Director** menu for your site



Step 2: Enter a **Title** for the feedback page. To add **Feedback Options** type the option into the text box and click **Add**. These options will appear in a drop down list at the front end.

Check **Allow Anonymous Feedback** to allow front end users to submit the form anonymously

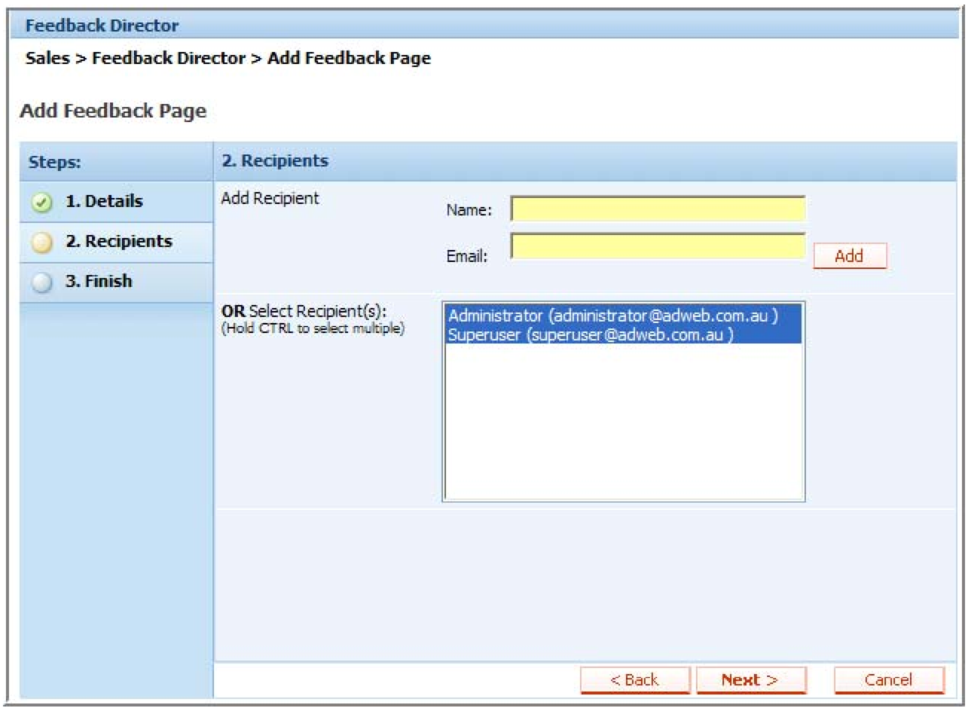
Check **Set As Default/Master Feedback Page** to set this as the default feedback page for the subsite. This means that if the **Feedback Director** application is dragged into the layout using **Layout Manager** it will link to this feedback page.



Step 3: Click **Next** to continue

Step 4: The recipients screen allows you to add multiple people who will be sent an email containing the contents of the feedback form when it is submitted. To add a recipient enter a **Name** and **Email** and click **Add**. Repeat this process to add additional recipients.

In order for all the added recipients to receive the email, hold down the control key on your keyboard and click on all the require names so that they are highlighted



Step 5: Click **Next** to continue

Step 6: If the summary details are correct click **Finish** to save the feedback form

If the page was set as the **Site Default** it will be used when the **Feedback Director** application is added to the layout. If not, the **Copy Link** button on the **Edit Feedback Page** screen to copy the link to the page and link to it from other areas in the intranet (e.g. from the navigation or a content published page).

Please see the **Help** for information on creating advanced online forms using the **Add Adv Feedback Page** option.

This completes the Quickstart User Guide

Other instructions can be found in the Installation and Set-up guides available from the Intranet DASHBOARD support site **http://support.intranetdashboard.com**. Access '**Help**' in the top right-hand corner of the Administration screen for more detailed instructions on how to set up the individual applications and the options available to you.

- The **Intranet DASHBOARD** Team