INTRANET DASHBOARD

Intranet DASHBOARD
Product Information and General Set Up

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Contents

Introduction

This guide is designed for intranet managers. It will take you through the set-up and configuration of your intranet. It provides useful information on the system architecture, setting permissions for your users, and the set-up of other subsites within your intranet.

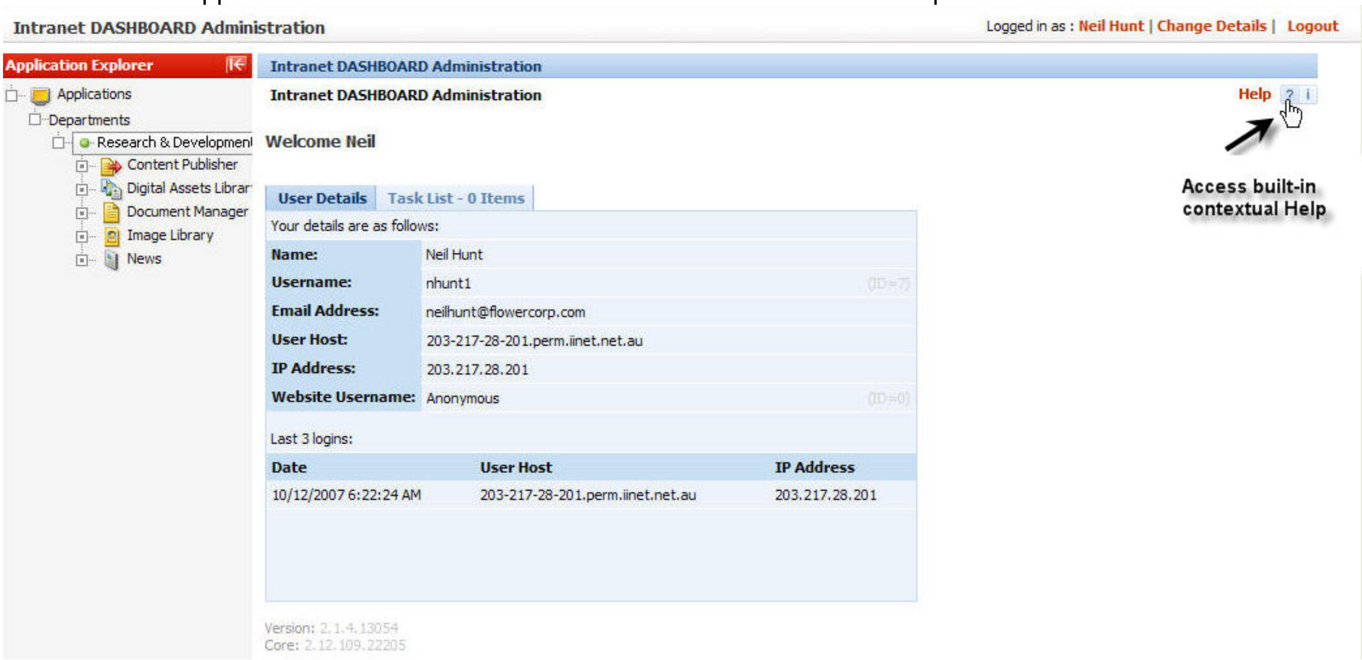
Developed by **The ADWEB Agency, Intranet DASHBOARD (iD)** provides consolidated intranet management, content management, business and communication tools, standards and governance support.

iD provides the solution to challenges faced by many organizations such as:

- Reducing infrastructure and maintenance costs
- Reducing development costs - through using an industry standard, .NET
- Providing standards and governance across your intranet or extranet
- Streamlining communications and content dissemination
- Providing knowledge management and collaboration options for knowledge workers
- Using a fully scalable solution that will integrate with legacy systems
- Reducing reliance on multiple vendor products
- Speed of intranet roll out

The tools revolve around the categories of communication and collaboration, business efficiencies and publishing or content management.

Details of each application and how to use them are contained in the online help feature of Intranet DASHBOARD.



We also offer consulting and training services to support your intranet implementation end-to-end so please contact us if you require more information or visit our website at **www.intranetdashboard.com**

Chapter 1 : System Architecture

Introduction

Intranet DASHBOARD has a multiple level architecture. The following diagram demonstrates the basic system architecture.

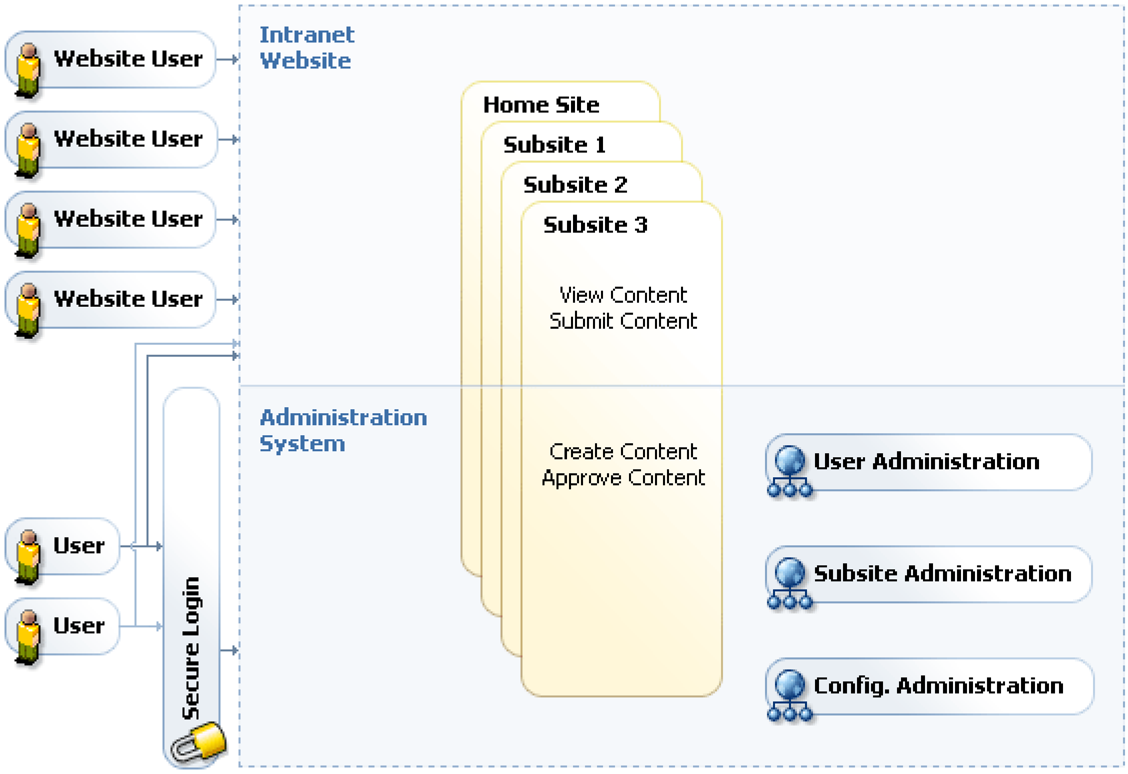


Figure 1. Intranet DASHBOARD System Architecture

Intranet DASHBOARD includes two separate modules for managing and using the intranet; the intranet site (front-end website) and the administration system (backend).

The intranet site is the system for website users to access the information stored on the intranet. The intranet site consists of a home site, for information general to the entire organization, as well as multiple subsites, allowing each division, subsidiary or group within the organization to store specific information. An unlimited number of website users can access the intranet from the front-end.

Chapter 1 : System Architecture

Introduction

You can choose from three types of front-end security:

- **None** - nothing is secured on the front end - every user has unrestricted access to all parts of the front end system. (Admin system is still secured as normal)
- **Login Security** - users must enter login details into a login page before they can access the site. When the system is installed a default login is provided with the following details:
  Username: guest
  Password: guest
- **Login On Demand** – Similar to Login mode, users are created by the administrators although by default all users are given access to all parts of the Intranet. At any time a user can Login with their details and then access secure areas restricted to their login account.
- **Active Directory Security** - user details are automatically obtained for all users connecting to the site from their Windows login information. This is the default security type and is what most installations of iD use.
- **Active Directory On Demand** - same as Active Directory security, except that users' details are not retrieved until the user requests a secure resource.

Management of the intranet occurs through a centralized administration system. Only administration users that have been allocated specific permissions can access the administration system, which occurs through the login process. There are two main sections to the administration system; administration for each subsite and general administration.

Each subsite has its own section of the administration system. Administration of each application allows users to manage the content for that application. Administrators of a particular subsite (Subsite Administrators) manage all the applications available to that subsite. Users can be given access to an entire subsite, or just specific applications within it, giving your organization better governance and control.

The general section of the administration system can only be accessed by 'superusers'; users with advanced permissions. There are three main components of the general administration;

→ subsite administration
→ user administration and
→ configuration administration

Subsite administration allows creation and management of subsites for each division or department of your organization. User administration allows management of which users can access the administration system, and the individual permissions each of those users have to the applications in each subsite. Configuration administration sets system-wide settings.

Chapter 1 : System Architecture

Intranet site

An intranet site typically consists of a collection of subsites. A separate subsite should exist for each division, functional group or department in your organization. Every subsite has its own section of the intranet site, including two types of pages. One is the subsite homepage, which provides quick access to the information in the subsite. This generic page contains all the applications, menus and links required by the subsite. This homepage provides links to the second type of page; published pages. Published pages, which are created by publishing Microsoft Word documents, form HTML web pages which can contain any type of content you wish on them. These pages are incorporated into the design scheme of the subsite's homepage and should follow a logical navigation structure.

For example, if in your company you have three divisions, with one of those divisions having two subdivisions, the following subsites could exist.

http://intranetName/Home
http://intranetName/Division1
http://intranetName/Division2
http://intranetName/Division3
http://intranetName/Division3/SubDivision1
http://intranetName/Division3/SubDivision2

Subsite creation, the Nav Editor, and the Content Publisher will assist you in creating this logical structure for your pages. Please refer to Online Help for more details on each of the applications.

Subsite Maintenance

A **subsite** is a specific website that can be customized to suit the needs of a particular group of people, department or region. Each subsite can be given a different layout, and may have access to only certain applications. The subsite administration section of the administration system allows creation and management of these subsites. Through subsite administration, you can manage the applications accessible to the subsite, as well as the users who can administrate the applications. Additional options allow customization of the subsite through modification of the header image and style sheets within the bounds set by the superuser.

Subsite groups are a mechanism for grouping similar subsites for administrative purposes. Subsite groups can be used to further control which applications subsites within that group may include on their subsite. The subsite group's name can be displayed as part of the title of the associated subsite on the intranet site.

Chapter 1 : System Architecture

User Administration (Administration Users)

There are multiple levels of user permissions in **Intranet DASHBOARD** allowing tailored management of exactly what users have access to. The diagram below summarizes the different permissions.

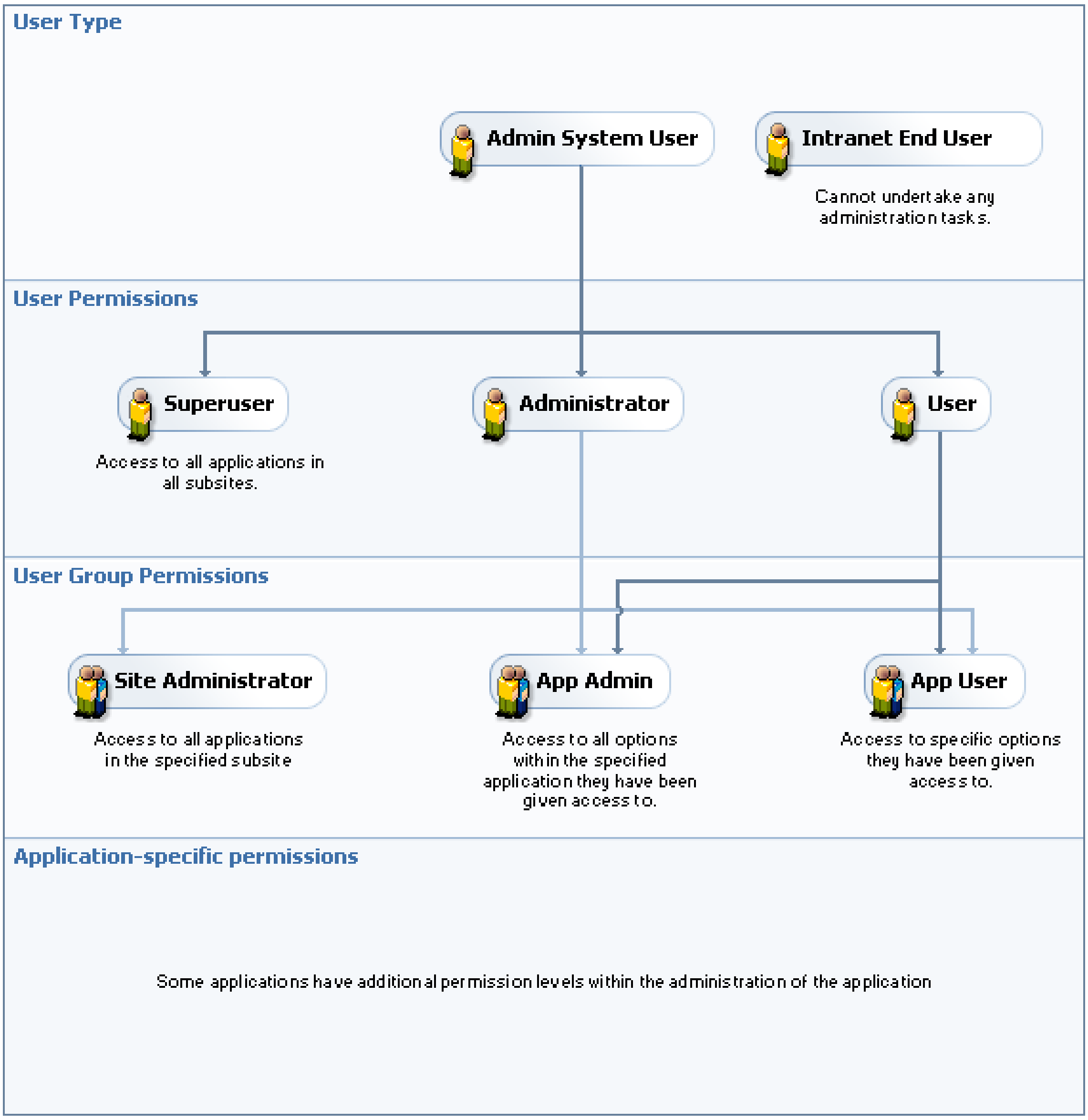


Figure 2. Levels of user permissions and access rights in Intranet DASHBOARD

Only users of your organization's network can access the intranet and their details are automatically retrieved from Active Directory. By default, most users have access to most of the content on the intranet, however, some applications allow specific content to be visible to only selected users.

User Administration (Cont'd)

A user account must be created for a person to allow them to log in to the **Intranet DASHBOARD** administration system and manage sections of the system. User administration allows you to manage these user accounts, thereby, controlling who can access the administration system, and what level of access they have. People with no administration responsibilities will be referred to as 'end users' (also known as front end / website users).

Each administration user has detailed information stored about them and is given a permission level of 'superuser' 'administrator' or 'user'. A superuser has access to all applications within all subsites, and all of the administration options on the system. Administrators and users can only access the particular applications within the particular subsites they have been granted access to, and cannot access administration options, other than administrators being able to add other users to access the administration system for which they are assigned. Administrators can also become 'site administrator' for a subsite, making them similar to a superuser within the administration of that particular subsite only.

A **User Group** is a collection of *permissions*, allowing superusers to easily select which options within which applications an administrator or user may access. For example, a user may be made a part of the user group "News Administrator". This user would then be able to add, edit and delete news articles, categories, sub-categories as well as other advanced options. In contrast, members of the "News User" user group would only be able to add, edit and delete news articles within the categories they have been given access to. Please also refer to Appendix A : Glossary Quick Reference.

Applications

Management of both the intranet itself and the content stored on **Intranet DASHBOARD** occurs through applications. **Intranet DASHBOARD** contains a suite of applications that create and manage information and business processes. Some of these applications are intranet-wide for maximum sharing of information, others are region-specific allowing subsites in the same area to share relevant information, and still others are subsite-specific allowing maximum customization for the individual subsite.

Intranet-wide Applications

Intranet-wide applications have the same settings and content for all subsites. Examples include *Acronym Manager*, *Employee Training* and *Sports Tipping*. In the administration system, the application can be administrated through the menu for any subsite although content is available from anywhere. Any changes made through the administration or on the intranet site are reflected throughout all subsites. For example, *Acronym Manager* is an intranet-wide application. A user with administrator rights to *Acronym Manager* in any subsite can manage the acronyms that are used throughout the entire intranet.

Region-wide Applications

A region can be created through advanced options of some applications such as *Meeting Room Booking* and *Forms Manager*. When a region is created, subsites can be set to that region. Many subsites can be in a region, however a subsite can only belong to one region. The characteristics of a region, and which subsites are in the region may change depending on the situation. A region allows the contents of an application to be shared between a number of related subsites. Each subsite in a region views an identical copy of the application. In the administration system, the application can be administrated through the menu for any subsite that belongs to the region. Any changes made through the administration or on the intranet site are reflected throughout all subsites in the region. For example, *Forms Manager* is a region-specific application.

Applications (Cont'd)

A collection of forms and scenarios that are specifically used for a region would be displayed to users of the intranet site for that subsite, and administrated by users with access to forms manager in the administration system for one of these subsites.

Subsite specific Applications

The remaining applications are specific to individual subsites. Examples include *Document Manager*, *Content Publisher* and *Layout Manager*. These applications involve content which is relevant only to users of that subsite, and this information cannot be displayed through other subsites. For example, layout manager is a subsite-specific application. *Layout Manager* defines the layout of a particular subsite on the intranet site, and hence changes are only visible on that subsite. A subsite's layout can only be administrated by users who have access to layout manager in the administration system for that subsite.

Applications (Cont'd)

The following table describes which applications are intranet-wide, region-specific and subsite specific.

	Intranet	Region	Subsite
Business Tools			
Contacts Manager	✓		
Document Manager			✓
Meeting Room Booking		✓	
File Express	✓		
World Time	✓		
Project Space	✓		
Forms Manager		✓	
Digital Assets Library			✓
Company Calendar			✓
People Search	✓		
Acronym Manager	✓		
Image Library			✓
Brand Manager	✓		
Employee Training	✓		
Process Tool			✓
Extranet Manager	✓		
iFrame Portlets			✓
Nav Editor	✓	✓	✓
Content Management/ Publishing Tools			
Content Publisher			✓
Ad Manager			✓
Portal Push & Pull	✓	✓	✓
Layout Manager			✓
iD Themes			✓
Statistics Reporter			✓
News			✓
Power Search	✓		
FAQs	✓		✓
Collaboration/ Communication Tools			
e-Newsletter			✓
Forum			✓
Feedback Director			✓
Quick Poll			✓
Sports Tipping	✓		
Survey Pro			✓
e-Postcards			✓
Travel Agent	✓		
Staff Offers			✓
Quick Links			✓

Table 1. Intranet, region and subsite specific applications

Chapter 2 : Initial Setup

This section should be completed by the overall administrator of the intranet

1. Go to http://<the intranet address of where you installed iD>/admin/
2. A temporary username and password have been set up for your first login. Enter the username '**superuser**' and the password '**dashboard**' and click **Login**. Update your user details.
3. Set up the site details for the home site.
   a. Click on **ID Home** then **Subsite Admin**.
   b. Enter the details for the subsite.
      - The **Name** will be displayed in the title of the browser.
      - If the **Status** is staging, it will be accessible from both the administration system and the intranet site.
   c. Under the **Header Image** tab, enter the text and logo for the header of the home page.
4. Set up the layout for the home site. To do this you will need to create a template (that other subsites will also be able to access) and then create a layout from this template.
   a. Click on the title of your **home site**, **Layout Manager**, **Advanced** then **Create New Template**.
   b. Select an appropriate style to base the template on. (Recommended: a style with top, centre pane and left and/or right panes.)
   c. Drag into the design the applications you would like be in the template by default (note that not all applications can be in every location). Include on the template applications you believe will be useful for multiple layouts, as it will be used as a basis for the site layout. Double clicking on an application once placed on the template locks it, meaning any layouts based on this template must have the application in that location, while the other applications may be removed if desired.
      - Recommended applications for inclusion:
        – Site header (in top) – LOCK
        – Site list to give access to other subsites (left/right pane)
        – Nav editor to provide links to pages within (or outside) your intranet (left/right pane) – LOCK
        – Clever tools for quick access to applications (left/right pane)
        – News (centre pane)
        – Feedback director (at the top of centre pane)
   d. Finish adding the template. Be sure to tick the checkbox for the home site you just named to make this template accessible.
   e. Create a layout based on this template, by going to your **home site**, **Layout Manager**, **Create Layout**. Just click next until the 'Make Active' checkbox is displayed. Tick this checkbox and the layout will be defined for the site. If you make the subsite active by modifying its status in **Subsite Admin**, the site will now be visible on the intranet site. Simply enter http://<name of the intranet> and the subsite should be displayed with this layout.

Chapter 3 : Setting Up Subsites

This chapter outlines the process of setting up additional subsites for divisions of your organization. There is no limit to the number of subsites that can be created. See the subsites section in **Chapter 1 : System Architecture** for further information on subsites and subsite groups in **Intranet DASHBOARD**.

Adding a new subsite group

The following steps will guide you through adding a new subsite group to the system. Every subsite belongs to a subsite group, and the group can specify details on applications for its associated subsites.

1. Select **Subsite Groups** from the **Subsites** menu, then select **Add Subsite Group**.
2. Enter the subsite group's **Name** and **Code** (abbreviated Name).
3. Click **Next** to continue.
4. Select the applications that should be accessible to subsites within this group. Click on the **Select All** link to select all applications. When creating a subsite in this group, you can select to not include all of these applications, however you cannot include any applications that have not been selected in the Subsite Group.
5. Click **Next** to continue.
6. Check that the details are correct. Click on the **Back** button to make changes to previous pages.
7. Click **Finish** to save.

Adding a new subsite

The following steps will guide you through adding a new subsite to **Intranet DASHBOARD**. The visual appearance of the subsite and the applications accessible to the subsite may be customized to suit the individual needs of the audience. A subsite group must exist before a subsite can be created.

1. Select **Add Subsite** from the **Subsites** menu.
2. Enter the **Name**, **Code**, **Subsite Group**, **Folder Name** and **Language** for the subsite.
3. Select the appropriate **Status** for the subsite. (It is recommended you leave the subsite as 'staging' until the subsite has been set up)

   → **Active** means the site can be edited in the administration system and can be viewed on the intranet site.

   → **Staging** means the site can be edited in the administration system, but is not visible on the intranet site.

   → **Inactive** means the site cannot be edited in the administration system and is not visible on the intranet site. For Example, if a department was removed for a period of time during a restructure.

   (The status for the subsite can be changed at any time by **editing** the subsite in the **Subsite** menu)

Check the **Enable Check In/Out** box if you would like you administrators to lock content from being edited by other administrators.

Subsites - Adding a new subsite (Cont'd)

4. Click **Next** to continue.

5. Select the applications that will be accessible from the subsite by placing a tick in the corresponding checkboxes. You must select layout manager from the list in order to be able to make the subsite accessible on the intranet site. Click on the **Select All** link to select all applications.

6. Click **Next** to continue.

7. Edit the text that you would like to appear in the Site Header section of the subsite.

8. Click **Next** to continue.

9. Optionally select users to be Site Administrators.

10. Click **Next** to continue.

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

12. Click **Finish** to save.

Chapter 4 : Setting Up Administrators

Adding a New User

The following steps will guide you through creating a user account, to allow another person to access the **Intranet DASHBOARD** administration system. By selecting appropriate details, you can restrict both the user's type of access, and also the specific areas they can have access to. Upon completion, you can select to email the new user their details.

See the users section in **Chapter 1 : System Architecture** for further information on users, permission levels, and user groups in **Intranet DASHBOARD**. Licensing details are displayed below with further information on the number of administration users that may be created.

1. Select **Add User** from the **User** menu.
2. Enter the user's **First Name**, **Last Name**, **Email Address** and any other details you would like to enter.
3. Click **Next** to continue.
4. Modify the user's **User Name**, **Password**, **Permission Level** and **Active** status as required.
5. Click **Next** to continue.
6. Click on the **Subsite** you would like to give the user access to. Tick the **Site Administrator** checkbox (users of superuser and administrator permission levels only) to give the user access to all applications within that subsite. Tick selected **User Groups** within the subsite the give the user access to specific options in selected applications. Repeat this process to give the user access to multiple subsites.
7. Click **Next** to continue.
8. If you would like to send a notification email to the entered email address for this user, place a tick in the email notification checkbox.
9. Click **Next** to continue.
10. Check that the details are correct. Click on the **Back** button to make changes to previous pages.
11. Click **Finish** to save. The user will now be able to log in to the system using the allocated username and password (which will be changed upon first visit to the administration system).

Chapter 4 : Setting Up Administrators

Licensing Details

You can download a trial version of **Intranet DASHBOARD** from **www.intranetdashboard.com** and run it with up to 10 administration users for 30 days. At any time you can choose to buy the software by visiting the online **Intranet DASHBOARD** Shop, **https://shop.intranetdashboard.com** where you can choose to buy as many licenses as required. You will need one license for each unique publisher or user of the administration system.

Once you have bought a license you will install it into your /bin folder of **iD** by copying the license file into the folder on your server. You will then see a message in your admin saying **Within the next 30 days dashboard needs to be activated**. You can do this via the internet (if your server has internet access) or by phone or email. To activate **iD**, follow the instructions included on the Activation page. The software is then fully activated. Please store all your license information and key file in a safe place in case recovery is needed.

At any time you can upgrade your licenses by going to the **iD Shop,** **https://shop.intranetdashboard.com**

How to Purchase Another License

1. Go to **https://shop.intranetdashboard.com**
2. Log in using the username and password that was sent to you via email. If you have forgotten it you can have it sent to you from the log in screen.
3. From the Account Details page you can upgrade an existing license by selecting the 'Upgrade' option to the right of the appropriate license.
4. Alternatively you can purchase a NEW license (for a different machine) by selecting 'Purchase' from the left hand navigation.
5. Select the number of NEW administrators you wish to purchase. In the case of an upgraded license, this number will be added to your existing license.
6. Continue with the purchase process.
7. Once the purchase is complete you can download the new license file from the Account Details page. If you have upgraded your license, the new license should replace the existing license.
8. When saving the license, ensure that it is not saved as an XML Document.

Chapter 5 : Quickstart Guide to Setting Up Applications

Intranet DASHBOARD includes a comprehensive suite of clever tools, ready to run. They are categorized into three main areas: Business Tools, Publishing or Content Management Tools, and Communications/ Collaboration Tools.

Each application will need to have particular aspects created in order to make the application functional, such as creating a category, editing settings and/or adding content. If you click on an application and one of the menu items, a **Help** link will appear in the top right hand corner. Click the link to view information about the application and how to set it up.

Recommended applications to familiarize yourself with first:

- → ***Nav Editor*** – Allows creation of a menu on the subsite webpage to help users of the intranet site navigate through the subsite.
- → ***Clever Tools*** – Gives users quick access to applications.
- → ***News*** - Allows you to display a list of news items to users of the intranet site.
- → ***Feedback Director*** **-** Provides a method for users of the intranet site to communicate with administrators.

The following is information on each application accompanied by details on how to initially set up the applications. By following the instructions titled "To begin using …" you will be able to see the basic functionality of the application. For specific information on each process, and information on more advanced tasks, refer to *Online Help* in the **Intranet DASHBOARD** Administration System.

When the instructions have been followed for the application, the application will still only be usable if it is accessible from the intranet site. To make the application accessible ensure one of the following is true.
- The application or non-default category is on the homepage of the subsite (using *Layout Manager* to drag the tool onto page)
- The application is included in the list of clever tools, AND *Clever Tools* is on the homepage of the subsite (again using *Layout Manager*).

Introduction to the Business tools

Nav Editor

Nav Editor provides a way of quickly and easily managing your navigation – the menu displayed on your web page. You can choose to display horizontal navigation (across the top of the page), vertical navigation (down the side of the page) or a combination of both. Navigation can be defined for all sites, a combination of sites, or for an individual site. Further information on the use of the Nav Editor is available from the Intranet DASHBOARD support site (**http://support.intranetdashboard.com**) or from the online help within the application.

To begin using Nav Editor

1. Select Add Nav Bar
2. Add the details of the Nav Bar, including whether it is horizontal or vertical navigation
3. Add Nav Items with links in a hierarchy to appear on the site
4. Click OK to save or Apply to continue adding other nav items.

Chapter 5 : Quickstart Guide to Setting Up Applications

Clever Tools

Clever Tools is a method of providing users of the intranet website with quick access to Intranet DASHBOARD applications. Working like a menu, users can select the appropriate 'tool' or application from the list and it will be displayed on the screen.

To begin using Clever Tools

1. In Clever Tools, select Add Tool
2. Assign the tool as a list or dropdown menu item
3. Click OK to save or Apply to continue adding other Clever Tools.

Contacts Manager

Contacts Manager is a tool on the intranet site that can be used to browse and store personal or shared contacts.

Contacts Manager can access contacts stored in a database or on an exchange server. By default Contacts Manager uses a database. To configure it to use an exchange server see the Contacts Manager Setup Guide available on the Support Site downloads page, **http://support.intranetdashboard.com/home/downloads**

To begin using Contacts Manager

1. Contacts Manager is immediately ready for use from the intranet site.

Chapter 5 : Quickstart Guide to Setting Up Applications

Introduction to the Business tools

Document Manager

Document Manager allows you to store documents in **Intranet DASHBOARD** that can be easily accessed by users of the intranet site. By placing *Document Manager* on your subsite (or having a link to it from *Clever Tools*), users can both search for documents and browse through the folders. When searching for documents, the search checks the title and description of every file accessible to users. When navigating through the folder structure, users can view all folders they have permission to access. In the administration system, all users that have access to documents manager will be able to edit all of the folders and their contents.

Online Help demonstrates how to manage the documents stored in *Document Manager* through the administration system. You will be guided through adding, editing and deleting folders, and selecting which users can access their contents from the intranet site. You will also be directed through adding, editing and deleting documents within these folders.

To begin using Document Manager

1. Create a category
2. Upload a document into the category.
3. This document will now be accessible from the intranet site

Meeting Room Booking

Meeting Room Booking provides a tool for managing room bookings for meetings across your organization.

Each subsite must belong to a region to allow bookings to be created. All subsites in a region share the same locations, rooms, facilities, facility managers and caterers. Details of the region, including which subsites are in the region can only be accessed through the home site.

Each subsite can have a number of locations at which meetings can be held. A location is the site of the meeting rooms, and it must provide sufficient information so that by just specifying the room name, it can be located. Each location has rooms available for booking. In this room, there are various facilities that may be booked with the room, eg a whiteboard. Details of each individual facility are not managed, it is up to the facility manager to handle the facilities. A facility manager handles all the facilities in one or more location(s). When users of the intranet site make a booking, contact details of the appropriate facility manager are provided. The facility managers are also sent an email with the details of the booking and requested facilities.

Contact details for caterers at the different locations are also stored. The contact details for these caterers are provided to users of the intranet site when they make a booking.

Chapter 5 : Quickstart Guide to Setting Up Applications

Introduction to the Business tools

Meeting Room Booking (Cont'd)

From the intranet site, users can navigate to a room by selecting the appropriate region and location. They can then create a booking for the room. These bookings cannot be edited by other users, unless they have been made a booking administrator. Booking administrators do not necessarily have access to the administration system; however they can edit all bookings through the intranet site. Booking administrators can only be set up through the home site administration area.

Online Help demonstrates how to manage the *Meeting Room Booking* application from the administration system. You can be guided through managing regions, locations, rooms and facilities for bookings in the subsites, as well as facility managers and caterers through administration of a subsite. Assistance on managing regions and booking administrators through the home site is also provided.

To begin using Meeting Room Booking

1. Add a region in the home site (the country/region of the room)
2. Add a location in a subsite (property address)
3. Add a room (a room in this location)
4. Add facilities for the room
5. (If required add a caterer and/or facility manager)
6. Users will now be able to create bookings for this room from the intranet site

File Express

File Express provides a method for users of the intranet site to send files to one another. Instead of emailing documents to each other which can often be troublesome with current file sizes and mail restrictions, users can upload the file(s), then email a link to the file(s) to as many other users as they wish. When this link is selected, the user will be taken to a page listing the documents that were uploaded so that they can download them. Users can copy this link after uploading the file(s) or choose to have the link emailed to them. In the administration system, there is a file log which contains all of the files that have been uploaded.

Online Help demonstrates how to manage the file log in the administration system. It will guide you through viewing the file log and clearing files from the file log.

Chapter 5 : Quickstart Guide to Setting Up Applications

Introduction to the Business tools

File Express (Cont'd)

To begin using File Express

1. Edit the email that is sent to users when they have uploaded a file(s). You only need to change the 'from' address.

2. Users will now be able to upload files, and download files from the provided link.

World Time

World Time allows you to store the time zone of cities all over the world. Users of the intranet site can then select two cities to work out the time difference between, and are displayed with a list of corresponding times for the two cities. Users can also select to view the hour-by-hour corresponding times for two time zones.

Intranet DASHBOARD comes with a list of time zones, which can be edited if required. You can then add cities to these time zones to provide easy access to time zone information to your employees.

Online Help demonstrates how to manage the times stored in *World Time*. You can be guided through adding, editing and deleting cities, as well as adding, editing and deleting time zones if required.

To begin using World Time

1. Add cities relevant to your organization

2. Users will now be able to view time comparisons between these added cities

Project Space

Project Space is an online workspace allowing online collaboration for projects, team activities and group discussion across your organization. **Intranet DASHBOARD** allows projects to be created from the intranet site. These projects can be created, accessed and managed totally through *Project Space*. By default users can only access projects they are a member of.

Through the administration system, you can nominate selected users of the intranet site to be Super Administrators. Super Administrators can access all created projects for the subsite they have been given access to.

Chapter 5 : Quickstart Guide to Setting Up Applications

Introduction to the Business tools

Project Space (Cont'd)

Online Help demonstrates how to view reports on the active projects, as well as how to manage which users are super administrators for the subsite.

To begin using Project Space

1. Project space is immediately ready for use from the intranet site
2. (Add a super admin if you would like someone to be able to view all projects)

Forms Manager

Forms Manager allows you to store information and forms relating to business processes and tasks on your intranet site.

A form is a document that can be downloaded by users of the intranet site or link to an existing online form. Grouped into categories (with multiple levels of subcategories), multiple versions of the form can be uploaded, so different languages can be included. A region is an overall category for the forms, with each form being specific to a particular region. For each region, one subsite manages its categories, forms and scenarios.

A scenario is a collection of forms (which can be from multiple categories) that may be used in a particular situation. For example, there may be a scenario for transferring to a new location. Forms for notifying payroll, changing a phone number and getting equipment transferred may all be listed in this scenario. Scenarios are combined into groups . For example a scenario group could be 'I am…' and the scenarios listed inside could be …moving office, …transferring jobs, …taking a holiday etc. Another example group would be 'How do I…' with scenarios …apply for a company car, …update my skills or …join a car pooling group.

From the intranet site, users can access forms in three ways. They can search by a *keyword*, select a *category* or select a *scenario*.

Online Help demonstrates how to manage *Forms Manager* through the administration system. It will guide you through adding, editing and deleting forms and the categories they are contained in. You will also find instructions on how to add, edit and delete scenarios and their groups. Information for the advanced options of adding, editing and deleting regions for the forms is also included.

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Introduction to the Business tools

Forms Manager (Cont'd)

To begin using Forms Manager

1. Add a new category
2. Upload forms into the category
3. Create a new scenario group
4. Create a scenario and include some of the forms you uploaded
5. Users of the intranet site will now be able to access the forms and scenario

Digital Assets Library

Digital Assets Library provides a storage system in **Intranet DASHBOARD** for assets of a digital nature. Grouped into categories, these items can be easily accessed by users of the intranet site by navigating through the categories they have access to, or searching for the item.

Online Help demonstrates how to manage the digital assets in *Digital Assets Library* through the administration system. There are guides for creating, editing and deleting items that can be accessed by users of the intranet site. Assistance for the advanced options of select file types that may be uploaded into digital assets library is also located in the Online Help.

To begin using Digital Assets Library

1. Create a category
2. Upload a document into the category
3. This document will now be accessible from the intranet site

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Company Calendar

Company Calendar is a calendar visible on the intranet site by all users of the subsite. Events are grouped into categories (which can be managed in the home site). Events can be added to the *Company Calendar* in the administration system, and all users of the intranet site will see these events when viewing the *Company Calendar* for this subsite. Users can export events from the company calendar to outlook. Categories and events in the home site are included in the calendar for every subsite.

Online Help demonstrates how to manage events in the *Company Calendar*. You will be guided through adding, edit and delete events. Details on how to create, edit and delete event categories is also included.

To begin using Company Calendar

1. *Company Calendar* can be immediately used on the intranet site.

2. (To include events in the calendar add an event category then add an event).

3. You will need to approve any events submitted from the intranet site for them to be included in the calendar.

People Search

People Search is a tool on the intranet site that can be used to search for any **Intranet DASHBOARD** user located in your Active Directory infrastructure. You can select which details are displayed to users when searching for a person.

Online Help demonstrates how to edit the server details used to retrieve users details from the LDAP database.

To begin using People Search

1. In the home site, edit the server details

2. Users of the intranet site will now be able to search for users (go to Administration -> Utilities -> LDAP Servers if the server has not yet been set up.

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ABC *Acronym Manager*

Acronym Manager allows you to store acronyms in **Intranet DASHBOARD**. On the intranet site users can search for an acronym and are then displayed with the meaning and description of the acronym. Users can also add acronyms through the intranet site, however, these will not become active until they are approved in the administration system.

Online Help demonstrates how to manage the acronyms stored in **Intranet DASHBOARD**. It will guide you through adding a new acronym and editing and deleting existing acronyms.

To begin using Acronym Manager

1. Edit the email that is sent to users when they have uploaded a file
2. Users will now be able to upload and download files

Image Library

Image library allows users to store, view and download images through **Intranet DASHBOARD**. Users of the administration system can create categories and upload images into these categories which can then be easily accessed, viewed and downloaded by users of the intranet site. These images can be browsed through by categories, or can be searched for by name. Users of the intranet site can also upload images, however these images must be approved in the administration system before they will appear in the library.

Through the administration system you can set two levels of permissions for the categories in *Image Library*; security for the administration system and permissions for the intranet site. Superusers and site administrators can set which categories administration users have access to. By default, all users of the intranet site can view images in all categories, however particular categories can have restricted access by allowing only certain users to view its contents.

Online Help demonstrates how to manage *Image Library*. There are guides for adding, editing and deleting images and the categories they are contained in. Details on how to approve images that have been submitted from the intranet site are also included. Advanced options allowing you to manage the types of images that may be uploaded are also explained.

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Introduction to the Business tools

Image Library (Cont'd)

To begin using Image Library

1. Create a category
2. Users of the intranet site will now be able to submit images (you can then approve them)
3. Upload an image into the category
4. This image will now be accessible from the intranet site

Brand Manager

Brand Manager provides a storage system in **Intranet DASHBOARD** to manage your company's brand(s) and all the information relating to it. Within a brand (that may have subfolders) you can have multiple libraries. A library is a collection of items specific to the brand, and may include files, email addresses and links to relevant websites. For example, there may be an icon library which includes various versions of the brand's icon and the email address of the creator of the logo. Default folders are subfolders which are automatically included in every brand added to the system. For example, there may be a default folder 'Artwork' which holds the libraries 'logos' and 'ads'.

By default only superusers and site administrators have access to the brands in the administration system. You can grant access to other administration users for individual brands.

From the intranet site, users can browse through all the brands they have access to, or can search for a brand. By default, created brands are accessible to all users, however you can select for a brand to be accessible by only certain users of the intranet site.

Online Help demonstrates how to manage the brands in Brand Manager. You can create, edit and delete libraries of items relevant to the brand for access by users of the intranet site. Advanced options in the administration system allow you to select the file types that may be uploaded and create default folders to be added to all brands upon creation.

To begin using Brand Manager

1. Create a new brand
2. Add a library to the brand
3. The library for the brand will now be accessible from the intranet site

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Introduction to the Business tools

Employee Training

Employee Training stores a collection of internal and external training courses available to employees. Users can view the details of all available courses through the intranet site, nominate to enroll in them, and are then informed via email of the status of their enrolment. In the administration system, you can select the courses available to users, and can modify the status of their enrolment in the course.

Online Help demonstrates how to manage Employee Training in **Intranet DASHBOARD**. You will find walkthroughs for managing courses, their categories and enrolments, templates for courses and reports of enrolments. Details for undertaking the advanced options of managing locations for courses, course types and employee job functions, as well as editing the notification emails sent to users when the status of their enrolment changes are also included.

To begin using Employee Training – Home site only

1. Create a region
2. Create a course type
3. Create a job function
4. Add a course category
5. Add a course
6. Users of the intranet site will now be able to submit a nomination for this course (which you will need to then approve)

Process Tool

The *Process Tool* allows you to tailor your own processes by stitching together any web pages or web-enabled tools. Eg. The Survey Pro or Feedback Director. A good example is where you create a process for OHS compliance where the employee needs to read the guidelines and agree they have read and understood them. You can even create a little test at the end. The manager is also able to track the progress of the user.

To begin using the Process Tool

1. Create a new folder under Manage Processes
2. Click on Add Process and give the process a name
3. Add the required details and URLs of the steps to be completed
4. Enter the details of what should happen upon completion of the process

5. Add the new process to the navigation

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Extranet (User) Manager

The Extranet Manager (also known as User Manager) tool allows users to log in and out of Intranet DASHBOARD and to view their login status. This tool is designed to be most useful with Intranet DASHBOARD in log in on demand mode.
Extranet (User) Manager is only available from within Layout Manager. There are no configuration options so it does not have its own administration menu section.

To begin using the Extranet Manager

1. Go to the Layout Manager application

2. Go to Edit Layout and drag the User Manager onto the layout

iFrame Portlets

The iFrame Portlet tool allows you to include any web-enabled application in the Intranet DASHBOARD framework. This includes webmail or your existing legacy applications.

To begin using iFrame Portlets

1. Go to the Layout Manager application

2. Select Add iFrame Portlet from the menu

3. Follow the wizard and enter the height you would like the displayed iFrame Portlet to be as a value in pixels. Select whether to allow scrollbars in the displayed iFrame Portlet

4. Go to Edit Layout and drag the new iFrame Portlet (formerly known as External Link) onto the layout

Chapter 5 : Quickstart Guide to Setting up Applications

Introduction to the Content Management/Publishing Tools

Content Publisher

Content Publisher allows you to publish files on your intranet. These files have an individual website created for them, so users can instantly access the file through the intranet site. Users cannot access any documents published in *Content Publisher* unless they have the link. A user can be emailed the URL of the document (this can be found in the administration system), and enter it into their browser to access the document. The link can be added to another content published file, the nav bar, a news item, or anywhere else within the intranet to allow quick and easy access.

Content Publisher provides you with two methods of publishing these files; uploading and publishing. Uploading a file simply places a link to that file on your intranet and when users go to this address, the file will automatically begin to download. File uploading is most often used for downloadable files like PDF's, spreadsheets etc. Publishing a document is only possible for Microsoft Word documents. In this process, all of the content of the document (including formatting and images) is added to a HTML page in the intranet. It is also possible to include news in these published documents.

In *Content Publisher*, you can use the folder tree to navigate through folders. When a folder is selected, the contents of the folder will be displayed.

This section demonstrates how to manage documents within *Content Publisher*. You can publish or upload documents to be accessed by users of the intranet site, manage the templates available to administration users, and select the file types that can be uploaded.

To begin using Content Publisher

1. Create a folder
2. Upload a file into the folder
3. Publish a document into the folder
4. By either emailing users the links to the documents, or placing the links on the nav bar or in a published page, users of the intranet site will be able to view/download the documents

Chapter 5 : Quickstart Guide to Setting up Applications

Introduction to the Content Management/Publishing Tools

CLICK HERE

Ad Manager

Ad Manager allows you to store banner ads in **Intranet DASHBOARD**. Grouped into categories, these ads act as links to a URL you specify.

A location is a way of combining a number of ads that can be displayed in a particular position. 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.

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

Online Help demonstrates how to manage the ads stored in **Intranet DASHBOARD**. Details for completing advanced options of creating, editing and deleting categories, locations and ad sizes are also included.

To begin using Ad Manager

1. Add an ad category
2. Add and ad location
3. Add an ad size
4. Add an ad/ads to the category
5. Manage the location and insert the ads into the location
6. Using layout manager, add the new location to the layout for the subsite
7. The ads will now be displayed on the intranet site as specified

Chapter 5 : Quickstart Guide to Setting up Applications

Introduction to the Content Management/Publishing Tools

Portal Push & Pull

Using Web Services, *Portal Push & Pull* allows any content managed by **Intranet DASHBOARD** or embedded in an **Intranet DASHBOARD** application to be placed in an Enterprise Information Portal/Portlet and displayed on your intranet. It can also pull in data from other systems allowing you to access information from one centralized interface.

Refer your application developers or portal system to the following URL:
http://<your intranet url>/admin/webservices/default.aspx.

Layout Manager

Layout manager is a tool that allows you to set up the screen layout for your subsite's intranet site. You can select an existing template, and then modify which applications you would like to have on your subsite, and the location of these applications. Through a simple drag and drop process, it is easy to manage the layout, including making some applications compulsory.

Online Help demonstrates how to create, edit, change and delete layouts for your subsite. Details on how superusers can manage the templates from which the layouts can be based on, and edit the options for each application is also included.

To begin using Layout Manager

1. In the home site create a new template (if not already completed)
2. For the appropriate subsite create a new layout. Be sure to include either clever tools (which you will need to populate) or multiple applications on the layout to make the required applications accessible from the intranet site.
3. The subsite homepage will now be visible on the intranet site.

iD Themes

iD Themes allows you to manage the "skins" or internal branding, colors and images of the **Intranet DASHBOARD** intranet site.

There are six default themes included as standard with **Intranet DASHBOARD**. These themes can be loaded onto the intranet site as they are, or can be customized as required. Themes can be applied both at the subsite and application level.

Introduction to the Content Management/Publishing Tools

iD Themes (Cont'd)

Online help demonstrates how to apply a theme to a subsite or application. There are also guides for advanced options of editing subsite and application themes, as well as importing and exporting these themes.

To begin using iD Themes

1. Apply a theme to the required subsite.

2. The intranet site will now be displayed according to the theme.

Statistics Reporter

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.

Online Help demonstrates how to use statistics reporter to display the statistics for your intranet.

To begin using Statistics Reporter

Please read the FAQ article on the Intranet DASHBOARD support site that outlines the process for setting up statistics reporter.
http://support.intranetdashboard.com/home/faq/43/37/83/FaqQuestionFront.aspx

News

News allows you to display a list of news items to users of the intranet site. Users can submit news articles through the intranet site, however the news must be approved from the administration system before it will be published in the news list. An article created in the administration system can also be submitted to other subsites.

All news belongs to a 'Category', which are used to group the news for display on the intranet site. These categories are specific to the subsite in which they are created. For example, there may be 'News' and 'Feature News' categories. When placing news on a subsite (using *Layout Manager*), all news categories exist separately. Any or all of these categories can be placed on the intranet site. Administration users can also create 'Sub-categories'.

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Introduction to Content Management/Publishing Tools

News (Cont'd)

Through sub-categories, users of the administration system can group articles from a number of different categories together. These sub-categories can then be used when publishing a document containing news.

Online Help demonstrates how to manage the news application. You will be guided through adding, editing and deleting news items, approving news items submitted by users, and creating categories and sub-categories for the subsite. Information on news permissions has further details on the type of access different users have.

To begin using News

1. Add a news category
2. Add a news article to the category
3. The news article will now be visible from the intranet site

FAQs

The FAQ application provides a way of creating and grouping frequently asked questions and placing them on the intranet webpage.

FAQ's are categorized into instances, each of which can be placed separately on the subsite webpage using Layout Manager. An instance is a collection of FAQ's that can be taken from a shared repository spanning the whole intranet. FAQ's can further be categorized into groups which sit under the instance level.

To begin using FAQs

1. Add an Instance of FAQs. Select Advanced from the FAQ menu. Then select Add Instance.
2. Add a Group for questions to be collated in for a particular audience. Select Add Group form the FAQ menu.
3. Add a question.
4. Add the FAQ instance to a subsite using Layout Manager or add FAQ to Clever Tools to access the application.

Power Search

Search allows users to search for pages within the intranet site. The contents of all applications are checked, and a list of matching results is displayed. Keywords entered when publishing a document using content publisher are also searched.

Online Help demonstrates how to manage the database connection.

To begin using Power Search

Power search will be available as soon as you have established the database connection.

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Introduction to the Collaboration/Communication Tools

e-Newsletter

e-Newsletter allows you to create newsletters and send them to users of the intranet site. These newsletters are grouped into categories. Only people within your intranet will be able to view the newsletter. Recipient lists consist of a collection of email addresses and allow you to easily send a newsletter to a group of people. Each newsletter has a default recipient list, however you can also select to send the newsletter to a different recipient list.

From the intranet site, users can select to subscribe and/or unsubscribe to a newsletter.

Online Help demonstrates how to manage the newsletters in *e-Newsletters*. There are guides for adding, editing and deleting newsletters and the categories they belong to. Details on how to add, edit and delete recipient lists for these newsletters is also included.

To begin using e-Newsletter

1. Create a newsletter category
2. Create a newsletter (through HTML or a template)
3. Users of the intranet site will now be able to signup to receive the newsletter (if you have allowed this)
4. Add a recipient list for the category
5. Send the newsletter
6. The newsletter you created will be sent to all members of the recipient list

Forum

Forum provides a method for users of the intranet site to communicate with one another. The *Forum* consists of topics, which can be created in the administration system, or can be created by users. Users can add a message to any topic available to them, but cannot edit or delete a message once it has been submitted.

Online help demonstrates how to manage the *Forum*. You will be guided through adding new topics, closing or deleting existing topics, and selecting to restrict a topic to certain users only. Details are also included on how to reply to messages in a forum and hide a message. Settings allow you to manage icons and labels for the topic and when the topic is to be deleted.

To begin using Forum

1. Create a category (eg. Social Club)
2. Create a subcategory (eg. Christmas Party)
3. Add a topic (eg. on the location of the party)

Forum will be immediately usable from the intranet site once it has been added to the layout or Clever Tools list.

Quick Links

Quick Links provide a way of grouping similar links and placing them on the intranet webpage. By creating categories of related links you can quickly provide users of your subsite with relevant common links to internal or external pages.

To begin using Quick Links

1. Create a category (eg. Government Links).
2. Create a group.
3. Add a quick link as either a list or dropdown menu item.

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Introduction to the Collaboration/Communication Tools

Feedback Director

Feedback Director provides a method for users of the intranet site to communicate with administrators. There is a default feedback page, which users of the intranet site will access when accessing the *Feedback Director* application. You can also create additional feedback pages. These feedback pages can then be linked to from other places in the intranet. Each feedback page has one or multiple recipients. When a user submits feedback through the intranet site, the recipient for the feedback page will receive an email containing the details. You can also use Feedback Director to create simple online forms for any purpose.

Online Help demonstrates how to manage user feedback in **Intranet DASHBOARD**. You can add, edit and delete feedback pages, and also add, edit and delete the recipients of feedback from these pages.

To begin using Feedback Director

1. Add a new feedback recipient
2. Add a new feedback page select it as the default, and select the appropriate recipient
3. Users of the intranet site can now submit feedback to the recipient

Quick Poll

Quick Poll is a method to find out the opinion of users of the intranet site. In the administration system, poll questions can be added and then displayed on the intranet site. If you have one active poll, it will appear every time the subsite webpage is viewed. If you have multiple active polls, only one poll will appear at a time, and this will be randomly selected. After users have voted (or by clicking on results), they can view the results of the poll.

Online Help demonstrates how to manage polls in **Intranet DASHBOARD**. You will be guided through adding a new poll question, and edit or delete existing poll questions.

To begin using Quick Poll

1. Create a new poll question
2. The poll question and results will now be accessible from the intranet site

Chapter 5 : Quickstart Guide to Setting up Applications

Introduction to the Collaboration/Communication Tools

Sports Tipping

Sports Tipping allows users of the intranet site to enter tips for sporting events.

A league contains information about the venues, teams and fixtures for a particular sport. An example could be an NBA Basketball Season whereby the administrator sets up a league, specifying rounds, games per round and which teams are playing each other.

A competition is created to allow a collection of users to tip in a league. The competition specifies the tipster group guidelines and how scoring is calculated for the tipsters in this competition. The scores from the users participating in this competition are used to create a ladder.

A tipster is a user who has signed up to tip in a competition.

A tipster group allows a tipster to monitor their scores against other selected users in a competition. Any user can create a tipster group when they are viewing the details of a competition that they are participating in from the intranet site. Once a tipster group has been created, members can then invite other people to join the tipster group.

Users of the administration system can enter results for games in a league. These results will be applied to all competitions in the league, and scores for each tipster will be calculated according to the scoring options set up for that competition.

Online Help demonstrates how to manage *Sports Tipping*. There are guides for creating, editing and deleting competitions and leagues as well as adding and editing scores for a league. There are also details on how to edit and delete tipsters and tipster groups from *Sports Tipping*.

To begin using Sports Tipping

1. Add a new league
2. Add a new Competition
3. The competition will now be available for tipping from the intranet site

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Introduction to the Collaboration/Communication Tools

Survey Pro

Survey Pro allows you to create surveys and send them to users of the intranet site. These surveys are grouped into categories. Only people within your intranet will be able to view and respond to the survey.

Intranet DASHBOARD stores information about each time a survey is sent and the responses submitted by users, including both individual results by a person and a summary of all the results.

Online Help demonstrates how to manage the surveys in Survey Pro. Details are given on creating new surveys or sending or deleting existing surveys. Further information describes how to add, edit and delete the categories these surveys are contained in.

To begin using Survey Pro

1. Add a new category
2. Add a new survey to the category
3. A link to the survey will be sent to the selected recipients and the survey will be immediately accessible from the intranet site.

e-Postcards

e-Postcards allow you to create postcards that can be sent from the intranet site. These postcards are grouped into categories. Only **Intranet DASHBOARD** users will be able to view sent postcards.

Online Help demonstrates how to manage the postcards in *e-Postcards*. You will be guided through adding, editing and deleting postcards and the categories they belong to.

To begin using e-Postcards

1. Add a new category
2. Add a new e-Postcard

The postcard will then be available for users to send from the intranet site.

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Introduction to the Collaboration/Communication Tools

Staff Offers

Staff Offers is a 'classifieds' listing which enables you and staff to publish unique offers, tickets, and goods to other members of your company. These offers are grouped into categories.

Online Help demonstrates how to manage the offers in staff offers. You will find details on how to add, edit and delete offers, as well as offer categories.

To begin using Staff Offers

1. Add a new category
2. Add an offer
3. This offer will now be visible from the intranet site

Travel Agent

Travel Agent provides a centralized hub for all travel and travel related communications from within your company. There are five areas in travel agent; travel centre, hotel guide, travel news, forum and advanced options.

To begin using the Travel Agent

1. Add a State
2. Add a new Travel Centre page
3. Add a new hotel
4. Add a news item

Localization

Localization allows for multiple language settings, and customization of the front end application text.

To begin using Localization

Please refer to the Localization Guide available from **http://support.intranetdashboard.com**

Contact Details

This concludes the Product Information and Set Up Guide. Please contact us for any further information at **http://support.intranetdashboard.com/guides/**

A number of consulting and support packages are also available to you. Please visit **http://www.intranetdashboard.com** for further details or contact an Account Manager.

Contacts

The ADWEB Agency

Technical Contact:	**Intranet DASHBOARD** Support Team
Postal Address:	PO Box 450 Richmond Vic 3121
Phone:	+613 9819 6333
Fax:	+613 9819 6533
Email:	support@intranetdashboard.com
URL:	**http://www.intranetdashboard.com**

Appendix A : Glossary Quick Reference

Active Directory - A central organized database providing storage for information about the users in an organization running a Windows domain infrastructure.

Users – In this User Guide, the term 'user' refers to the account that has been created allowing a particular person in your organization to access the administration system. Users with advanced options are superusers and administrators.

Superusers – A user who has access to all applications within all subsites, and all of the administration options on the system.

Administrators – A user who can manage selected applications within particular subsites, as set by a superuser.

User Group - A collection of permissions, allowing superusers and administrators to easily select which options within which applications an administrator or user may access.

End users – End users are the people who access your intranet but do not have any administrative responsibility. They are the everyday people who access information and communications tools on the intranet. (Also known as **Website users or front end users**)

Homepage - The starting point of a website consisting of the basic information on the theme of the whole, and links to other related pages.

Website – A collection of pages belonging to the same person, group, business or any other organization.

Extranet – A private network that uses the Internet protocol and the public telecommunication system to securely share part of a business's information or operations with suppliers, vendors, partners, customers, or other businesses.

Intranet - An internal information system that works much the same way as the Internet but only the people in your organization can access or post information.

Home site – Contains information general to the entire organization. The default site when no subsite is included in your intranet URL.

Subsite - a specific website created on your intranet that can be customized to suit the needs of a particular group of people, department or region.

Subsite Active – The subsite can be edited in the administration system and can be viewed on the intranet site.

Subsite Staging – The subsite can be edited in the administration system, but is not visible on the intranet site unless you enter via the administration system for testing purposes.

Subsite Inactive – The subsite cannot be edited in the administration system and is not visible on the intranet site.