



Installation, Set-up & User Guide

Revision 1.1 | www.dashboard.net.au



Contents

Introduction

Chapter 1: Installation Manual

Chapter 2: System Architecture

- 2.1 Intranet Website
- 2.2 Sub Site Maintenance
- 2.3 User Administration
- 2.4 Applications
- 2.5 Configuration Administration

Chapter 3: Initial Setup

Chapter 4: Setting Up Sub sites

Chapter 5: Setting Up Administrators

Chapter 6: Setting Up Applications

Appendix A: Glossary Quick Reference

ENHANCE YOUR INTRANET

Introduction

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 organisations 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.

This guide will take you through the initial installation process, then help you to set-up and configure your intranet. It provides useful information on the architecture, setting permissions for your users and the set-up of other sub sites within your intranet.

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.dashboard.net.au

Let's begin...

ENHANCE YOUR INTRANET

Chapter 1 : Installation

Overview

This chapter details the steps required to install **Intranet DASHBOARD (iD)** on a server within your organisation.

Pre-Installation Procedure

Prior to installing **Intranet DASHBOARD** the following pre-installation tasks must be completed to ensure the correct functioning of the system after installation.

Software Requirements

The following systems and applications need to be installed before installing **Intranet Dashboard**:

- Microsoft Windows 2003 or 2000 Server
- SQL Server 7 or 2000
- Microsoft Service Pack 2 or greater, for Windows 2000 Server
- Microsoft Word XP, 2003 or above

Domain Membership

Intranet DASHBOARD's integrated security and single sign on operates when the web server and clients are all part of a Windows Domain. Therefore domain membership and the presence of a domain in your organisation is beneficial but not required to successfully install and operate **Intranet DASHBOARD**.

Task 1: Application Server Configuration

Internet Information Services (IIS) needs to be installed on your server before setup is run. IIS is installed as a default on Windows 2000 Server, but not for Windows 2003 Server. If IIS is already installed on your server bypass this task.

If your server is running on **Windows 2000 Server** follow the steps below:

1. Log on to the computer as an Administrator.
2. Open Add/Remove Programs
Start -> Settings -> Control Panel -> Add/Remove Programs
3. Click the Add/Remove Windows Components button.
4. Check Internet Information Services (IIS) and click details.
5. Check all the options in the list and click OK.
6. Click Next.
7. Select Remote Administration Mode as the Terminal Services configuration.

ENHANCE YOUR INTRANET

Chapter 1 : Installation

Task 1: Application Server Configuration (Cont'd)

8. Click Next to begin the installation.
You may be asked to insert your Windows Server 2000 CD.
9. Click Finish and close Add/Remove Programs.

If your server is running on **Windows 2003 Server** follow the steps below:

1. Log on to the computer as an Administrator.
2. Open Manage Your Server.
Start -> Programs -> Administrative Tools -> Manage Your Server
3. Click the Add or remove a role button.
4. Click Next.
5. Select the Application server (IIS, ASP.NET) entry and click Next.
6. Check the Enable ASP.NET box and click Next.
7. Click Next to begin the installation.
You may be asked to insert your Windows Server 2003 CD.
8. Click Finish and close Manage Your Server.

Task 2: Microsoft Word Installation and User Configuration

A prerequisite of **Intranet DASHBOARD** is the installation of Microsoft Word XP, 2003 or greater on the web server. Microsoft Word is used to publish pages through the *Content Publisher* application and provides a streamlined approach to creating intranet content simply and effectively by distributed authors within your organisation.

Install Microsoft Word XP, 2003 or greater onto the Web server.

Task 3: User Configuration for Word

After Microsoft Word is installed onto the web server, a user must be created to run Word. Please follow the instructions below to create the Word user on your server and contact your system administrator for further information about how to do this within your organisation.

Please note you may skip this step and complete it later if you do not wish to publish content immediately.



Chapter 1 : Installation

Task 3: User Configuration for Word

Word User Installation

If your server is running on **Windows 2003 Server** follow the steps below:

1. Log on to the computer as the Administrator and create a new user account that will automate Office. In our example, this account is named **OfficeAutomationUser**. Create a password for this user account, and select **Never expire** so that the password does not have to be changed.
2. Add the **OfficeAutomationUser** account to the Administrators group.
3. Log in to the computer as **OfficeAutomationUser** and install (or reinstall) Office using a complete install of Word. For system robustness, it is recommended that you copy the contents of the Office CD-ROM to a local drive and install Office from this location.
4. Start the Microsoft Word application. This forces Word to register itself.
5. After the application is running, press ALT+F11 to load the Microsoft Visual Basic for Applications (VBA) editor. This forces VBA to initialize itself.
6. Close the applications, including VBA.
7. Click **Start**, click **Run**, and then type **DCOMCNFG**. In the tree view click on: Component Services > Computers > My Computer > DCOM Config

Select **Microsoft Word Document** from the list on the right.

Click **Properties** to open the property dialog box for this application.

8. Click the **Security** tab. Verify that **Use Default Access Permissions** and **Use Default Launch Permissions** are selected.
9. Click the **Identity** tab. Select **This User** and type the username and password for **OfficeAutomationUser**.
10. Click **OK** to close the property dialog box and return to the main applications list dialog box.

Chapter 1 : Installation

Task 3: User Configuration for Word (Cont'd)

Word User Installation

11. Click the **Configure My Computer** button in the bar below the menu bar, and click the **Default COM Security** tab.
12. Click **Edit Defaults** for access permissions. Verify that the following users are listed in the access permissions, or add the users if they are not listed:
 - SYSTEM
 - INTERACTIVE
 - Everyone
 - Administrators
 - OfficeAutomationUser
 - IUSR_<machinename> *
 - IWAM_<machinename> *
 - ASPNET (if available)
13. Make sure that each user is allowed access, and then click **OK**.
14. Click **Edit Defaults** for launch permissions. Verify that the following users are listed in the launch permissions, or add the users if they are not listed:
 - SYSTEM
 - INTERACTIVE
 - Everyone
 - Administrators
 - OfficeAutomationUser
 - IUSR_<machinename> *
 - IWAM_<machinename> *
 - ASPNET (if available)
15. Make sure that each user is allowed access, and then click **OK**.
16. Click **OK** to close DCOMCNFG.

If your server is running on **Windows 2000 Server** follow the steps below:

1. Log on to the computer as the Administrator and create a new user account that will automate Office. In our example, this account is named **OfficeAutomationUser**. Create a password for this user account, and select **Never expire** so that the password does not have to be changed.
2. Add the **OfficeAutomationUser** account to the Administrators group.

ENHANCE YOUR INTRANET

Chapter 1 : Installation

Task 3: User Configuration for Word (Cont'd)

Word User Installation

3. Log in to the computer as **OfficeAutomationUser** and install (or reinstall) Office using a complete install or Word. For system robustness, it is recommended that you copy the contents of the Office CD-ROM to a local drive and install Office from this location.
4. Start the Microsoft Word application. This forces Word to register itself.
5. After the application is running, press ALT+F11 to load the Microsoft Visual Basic for Applications (VBA) editor. This forces VBA to initialize itself.
6. Close the applications, including VBA.
7. Click **Start**, click **Run**, and then type **DCOMCNFG**. Select the application that you want to automate. The application names are listed below:

Microsoft Word Document

Click **Properties** to open the property dialog box for this application.

8. Click the **Security** tab. Verify that **Use Default Access Permissions** and **Use Default Launch Permissions** are selected.
9. Click the **Identity** tab. Select **This User** and type the username and password for **OfficeAutomationUser**.
10. Click **OK** to close the property dialog box and return to the main applications list dialog box.
11. In the DCOM Configuration dialog box, click the **Default Security** tab.
12. Click **Edit Defaults** for access permissions. Verify that the following users are listed in the access permissions, or add the users if they are not listed:
 - SYSTEM
 - INTERACTIVE
 - Everyone
 - Administrators
 - OfficeAutomationUser
 - IUSR_<machinename> *
 - IWAM_<machinename> *
 - ASPNET

ENHANCE YOUR INTRANET

Chapter 1 : Installation

Task 3: User Configuration for Word (Cont'd)

Word User Installation

13. Make sure that each user is allowed access, and then click **OK**.
14. Click **Edit Defaults** for launch permissions. Verify that the following users are listed in the launch permissions, or add the users if they are not listed:
 - SYSTEM
 - INTERACTIVE
 - Everyone
 - Administrators
 - OfficeAutomationUser
 - IUSR_<machinename> *
 - IWAM_<machinename> *
 - ASPNET
15. Make sure that each user is allowed access, and then click **OK**.
16. Click **OK** to close DCOMCNFG.

Task 4: Intranet DASHBOARD software installation

1. Execute the Intranet DASHBOARD setup program (iD11install.exe)

Please note that Microsoft .NET 1.1 Framework will be installed as part of the installation process if it is not already installed on the computer. Therefore, Administrator rights are required for the installation to take place.

Welcome Screen

- Click Next.

Step 1. License Agreement

- Read the License Agreement then click Yes if you agree.

Step 2. Select Installation Folder

- [Optional] Click browse to choose a custom folder to install **Intranet DASHBOARD** to.
- Click Next.

ENHANCE YOUR INTRANET

Chapter 1 : Installation

Task 4: Intranet DASHBOARD software installation

Step 3. Configure Application Settings

- Fill in appropriate details for your companies Intranet.

Company Name	Your company name
Intranet Name	Your intranet name ie. CompanyWeb
Admin Name	The name of the person or team responsible for maintaining the intranet
Intranet Email Address	Email address of the person or team responsible for maintaining the intranet
Mail Server	The mail server that will be used to send email through. May be localhost or an internal SMTP relay server
Mail Server Type	Leave as default SMTP

- Click Next.

Step 4. Select SQL Server

- Select an SQL server from the list, or type in an SQL server's name.
- Enter a username and password for the SQL server you have selected. This user needs to have permission to create databases. Typically use the sa account.
- Click Next.

Step 5. Configure Database

- Enter a name for the new database.
- [Optional] If you want the data files for the new database to be in a non-standard location then change the Data Folder. This path is on the computer the SQL server is running on which is not necessarily the computer the installer is running on.
- Click Next.

Step 6. Configure Website

- Enter the name for the new website that **Intranet DASHBOARD** will use. This is the name that will appear in the IIS Manager. It does not affect how users will connect.
- Enter the IP Address. Leave blank to use all IP Addresses.
- Enter the Port. The default is 80.
- Enter the Host Header. This is used if you are running more than one website on an IP Address. It should match the DNS name that will be assigned for **Intranet DASHBOARD**.
- Click Next.

Step 7. Review settings before copying files

- Check that the settings you have entered are correct.
- Click Next to begin the installation.

ENHANCE YOUR INTRANET

Chapter 1 : Installation

Task 4: Intranet DASHBOARD software installation (Cont'd)

Step 8. Finished Screen

- Click Finish.
- 2. Request the setup of a DNS record to point to your server. You will need to contact your system administrator or DNS team for this.
- 3. Open the admin system and check that you can access **Intranet DASHBOARD**

`http://yourintranet/admin`

Use the default login:

Username:	superuser
Password:	dashboard

We highly recommend that you change this password once you have successfully logged in and have your intranet up and running.

Once logged in you are able to create new users and give them access to the applications installed with **Intranet DASHBOARD**. For information about how to use these applications to the online Help.

Task 5: Index Server Setup

To enable search capabilities on uploaded content to **Intranet DASHBOARD** please complete the following steps to configure Index Service.

1. Log onto your web server as user with Administrative privileges
2. Right click My Computer and click Manage
3. Expand Services and Applications Menu
4. Right click on Indexing Service and stop the service.
5. Create a new catalog.
6. Name the new catalog as 'iDCat'
7. Browse the location so it points to local index service catalogues folder on your server. You may need to create a new folder for this purpose or speak to your system administrator. Please do not save the index catalogue in the same folder as you have installed **Intranet DASHBOARD**.
8. Expand Indexing Service menu and right click on 'iDCat' select properties

ENHANCE YOUR INTRANET

Chapter 1 : Installation

Task 5: Index Server Setup (Cont'd)

9. Click on 'Tracking' tab and select WWW server so it points to **Intranet DASHBOARD** website.
10. Click on 'Generation' tab
 - a. Leave Index Files with unknown ext checked
 - b. Deselect 'Inherit above setting from Service'
 - c. Select 'Generate Abstracts'. Click OK
 - d. Leave maximum size in (in characters) as 30
11. Right click on 'Indexing Service' and start.
12. Click Indexing Service to see list of the number of files etcetera currently indexed and the size of the index.

Once index service has been configured correctly it will not begin to process requests until **Intranet DASHBOARD** has been configured to query the appropriate index service catalogue.

Configure Index Service

1. Log in to the Admin (<http://<your intranet url>/admin/>) with the **superuser** account
2. Navigate to **Applications, DASHBOARD Home, Search, Search Tools.**
3. Enter the **Server Name** of the server running index service. (web server)
4. Enter the **Catalogue Name** created earlier in this step. (iDCat)
5. Click **Test Connection** to verify that everything is working correctly.
6. Click **OK** to save the configured information.

Detailed Database Server Background Notes

This section seeks to provide a detailed description of the database objects created with the installation of **Intranet DASHBOARD**, requirements of the system and permissions associated with the database. It will be useful for your system administrator.

Database Objects

Intranet DASHBOARD installs a new database on SQL server that is used solely as a database repository for information displayed on the intranet website.

The database name is configurable via the installation executable and can be set to anything that you require. Please follow internal naming conventions where possible.

The database consists of tables, stored procedures and functions.

ENHANCE YOUR INTRANET

Chapter 1 : Installation

Backup

It is very important that database backups are taken regularly as the database utilises Simple recovery on the data files storing minimal transaction logs. Please consult with your DBA for further information about how to enable backups.

Backup frequency:	Daily (or greater)
Backup type:	Full
Backup file:	Data only

Permissions

A new database user will be created during the installation of **Intranet DASHBOARD**. This user can be defined during the setup and will be created with db_owner permissions on the **Intranet DASHBOARD** database.

The following objects will be set to executable on the **master** database for the user created to enable querying of the Index Service via a stored procedure.

```
sp_OACreate  
sp_OADestroy  
sp_OAGetErrorInfo  
sp_OAGetProperty  
sp_OAMethod  
sp_OASetProperty  
sp_OAStop
```

Prerequisites

1. SQL Server must be set up to handle SQL Server and Windows Authentication modes.
2. A database **sa** or equivalent login must be available when running the login script so as to have the correct permissions to create the database and user for **Intranet DASHBOARD** to use.

Detailed Web Server Background Notes

This section provides detailed information about the web server installation of **Intranet DASHBOARD** including, files, installer, permissions and IIS configuration.

Website folder and files

The files and folders copied to the website folder created on the web server are all contained within the one root folder as created during the installation. No other files or folders are added to the server during installation.

Chapter 1 : Installation

Detailed Web Server Background Notes

The basic structure of the folders is:

/admin	Folder containing all admin files
/apps	Folder containing all front end application files
/aspnet_client	Standard .NET Framework files
/bin	Application DLL's
/cfr	Central File Repository for application config files and cache
/images	Folder containing all front end images
/includes	Folder containing all front end include files
/ufr	Folder where all sub sites and user content is upload to
/webctrl_client	Standard .NET Framework files

Please note that the /ufr folder will grow in size as the intranet site is developed and used and as such size considerations will need to be taken into account.

IIS Website

The IIS website created will set up to point to the folder where **Intranet DASHBOARD** files were copied to. The website will be configured such that IIS will pass all queries through the ASPNET account through an application mapping.

Task 5 : Login details

Open the **Intranet DASHBOARD** website and log into the admin system with the following credentials.

Admin area: `http://<your intranet url>/admin/`

Username: superuser
Password: dashboard

You will be prompted to change the password to a new more secure password and then log into the admin system.

Once logged in you are able to create new users and give them access to the applications installed with **Intranet DASHBOARD**. For information about how to use these applications please refer to the **Online Help** reference.

Please refer to Chapters 3 and 4 for further set-up information.

Active Directory Setup

To configure your server to automatically authenticate users from your Windows Domain the following setup will be required.

ENHANCE YOUR INTRANET

Chapter 1 : Installation

Active Directory Setup

Open **Intranet DASHBOARD** administration.

`http://<intranet url>/admin`

1. In the **Administration** menu, select **Utilities**, then **LDAP Servers**, then **Add LDAP Server**.
2. Enter the name and port of your primary server, and alternate server (if one exists).
3. Enter the **Connection Details** for the server.
4. Click on **Test Connection** to check if the entered details produce a connection.
5. Click **Next** to continue.
6. Enter any **Restrictions** that apply (leave blank to begin with)
7. Click **Next** to continue.
8. Check the details are correct.
9. Click **Finish** to save the information. The LDAP server's details have now been stored successfully in **Intranet DASHBOARD**.

Now we have configured **Intranet DASHBOARD** to talk to your LDAP (Active Directory Server) for automatic Login authentication for users on your domain.

Next we can optionally setup *People Search* to return specific information from Active Directory when queried from your intranet site.

With the Admin still open

1. In the **Applications** menu, select your home site, **People Search**, then **Edit Server Details**.
2. Edit the details. Click on the **Query Fields** tab to edit the query fields. See below for further details.
3. Click **Apply** to save while remaining on the current page. Click **OK** to save.

Name / Description

The name and description section defines the name and text that appears on the front page of the site in the *People Search* section. If your organisation uses a specific name for its user's database then please put this name and description in this section.



Chapter 1 : Installation

Query Fields

The query fields section provides a list of the fields that are searched and returned from Active Directory. The table at the top lists the fields that have already been added.

- **Query Fieldname** is the AD field name to be queried. To verify this information use an LDAP query tool to locate the correct field names.
- **Front End Results Display** is the user friendly name that we give to the query fieldname. (eg: sn -> Surname). (Please contact your system administrator for a list of Active Directory fields for your organisation)
- **Position** refers to the order that the fields will appear on the results pages. Position 1 is the first position.
- **Appear on Front Page** sets whether the field will appear on the search results page. All fields will appear on the details page that can be clicked through from the search results page.

Chapter 2 : System Architecture

Introduction

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

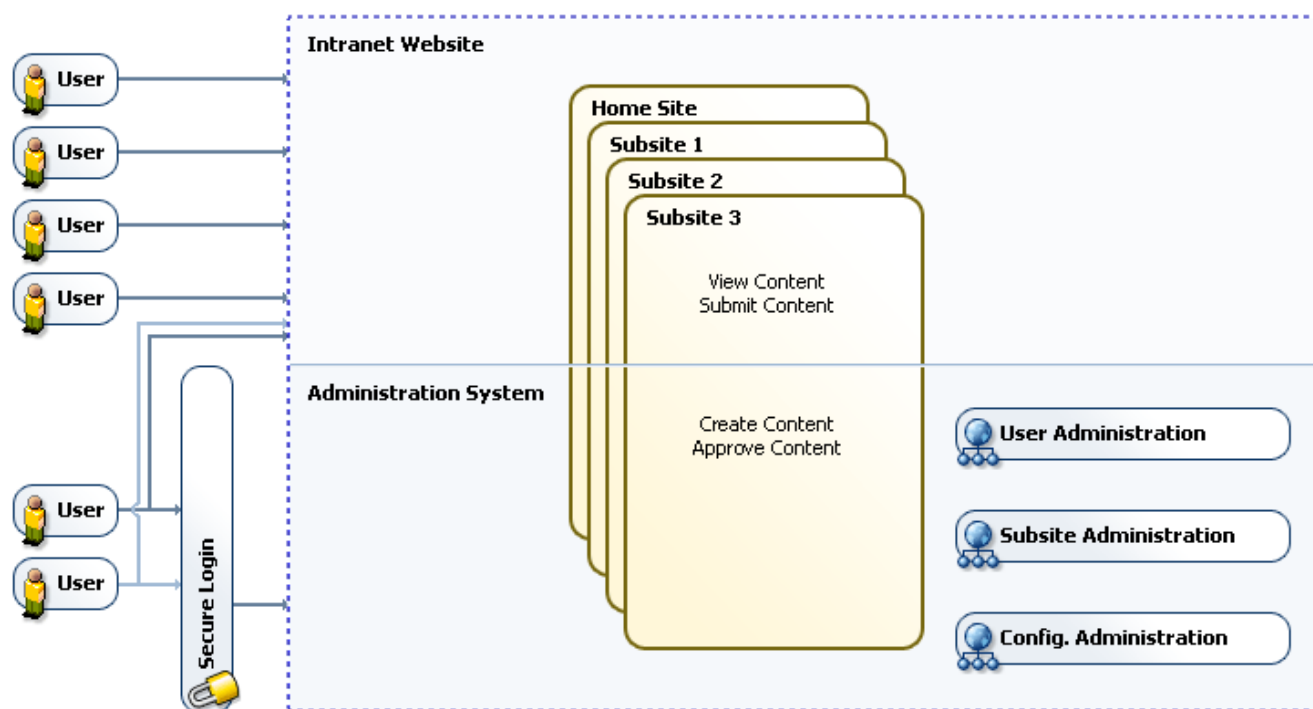


Figure 1. Intranet DASHBOARD System Architecture

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

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

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

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

ENHANCE YOUR INTRANET

Chapter 2 : System Architecture

Introduction

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;

- sub site administration
- user administration and
- configuration administration

Sub site administration allows creation and management of sub sites for each division or department of your organisation. 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 sub site. Configuration administration sets system-wide settings.

2.1 Intranet Website

An intranet website typically consists of a collection of sub sites. A separate sub site should exist for each division, group or department in your organisation. Every sub site has its own section of the intranet website, including two types of pages. One is the sub site homepage, which provides quick access to the information in the sub site. This generic page contains all the applications, menus and links required by the sub site. 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 sub site's homepage and 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 sub sites could exist.

```
http://intranetName/Home_site  
http://intranetName/Division1  
http://intranetName/Division2  
http://intranetName/Division3  
http://intranetName/Division3/SubDivision1  
http://intranetName/Division3/SubDivision2
```

Sub site creation and the Content Publisher will assist you in creating this logical structure for your pages. Please refer to Online Help for more detail on this application.



Chapter 2 : System Architecture

2.2 Sub site Maintenance

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

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

Chapter 2 : System Architecture

2.3 User Administration

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

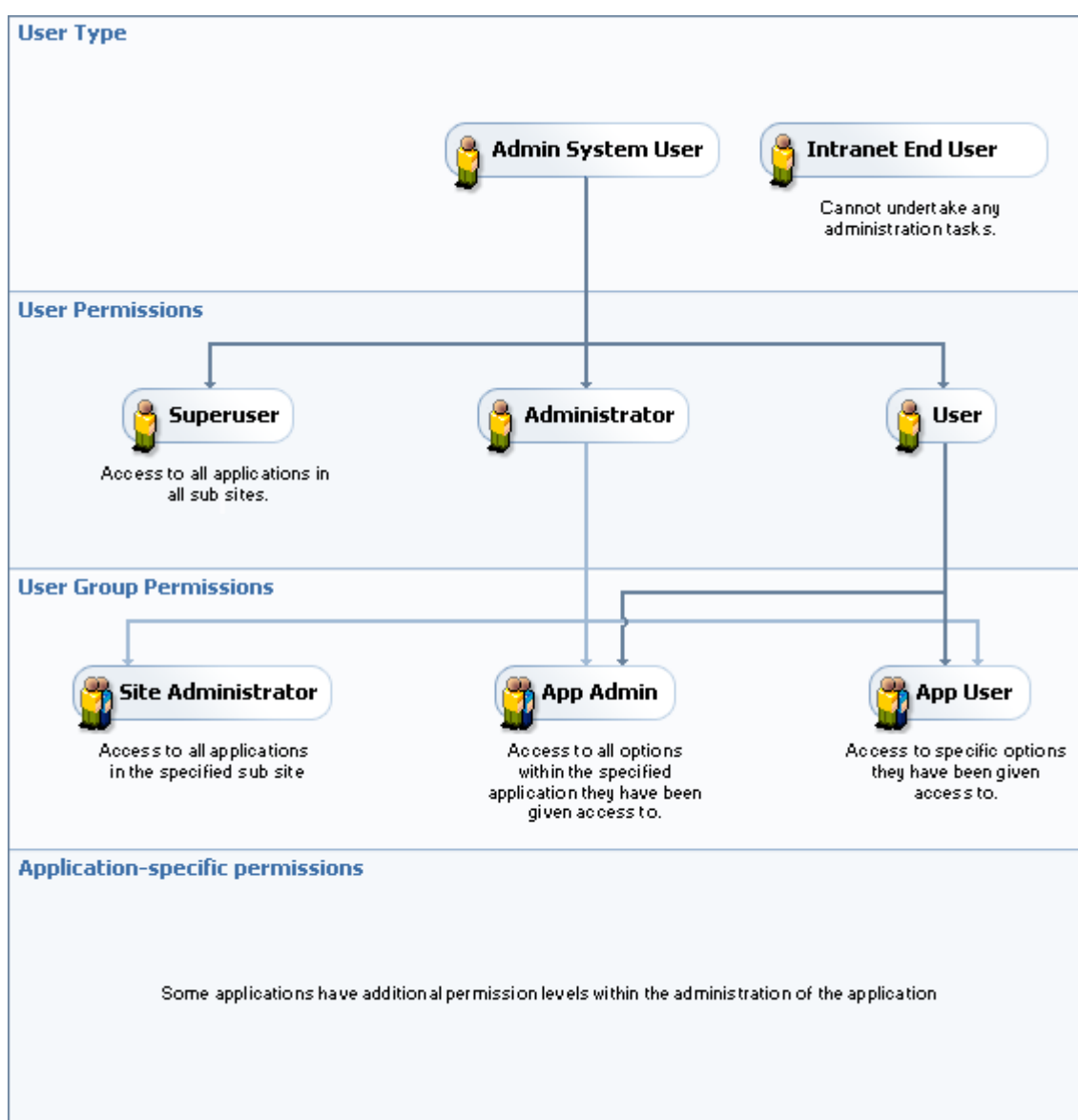


Figure 2. Levels of user permissions and access rights in Intranet DASHBOARD

End users of the intranet website do not need to log in. Only users of your organisation's network can access the intranet and their details are automatically retrieved from Active Directory. By default, most users have access to

ENHANCE YOUR INTRANET



most of the content on the intranet, however some applications allow specific content to be visible to only selected users.

ENHANCE YOUR INTRANET



Chapter 2 : System Architecture

2.3 User Administration

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'.

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 sub sites, and all of the administration options on the system. Administrators and users can only access the particular applications within the particular sub sites 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 sub site, making them similar to a superuser within the administration of that particular sub site *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, subcategories 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.

2.4 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 sub sites in the same area to share relevant information, and still others are sub site-specific allowing maximum customisation for the individual sub site.

Intranet-wide Applications

Intranet-wide applications have the same settings and content for all sub sites. Examples include *Acronym Manager*, *Employee Training and Sports Tipping*. In the administration system, the application can be administrated through the menu for any sub site. Any changes made through the administration or on the intranet website are reflected throughout all sub sites. For example, *Acronym Manager* is an intranet-wide application. A user with administrator rights to *Acronym Manager* in any sub site 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, sub sites can be set to that region. Many sub sites can be in a region, however a sub site can only belong to *one* region. The characteristics of a region, and which sub sites 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 sub sites. Each sub site in a region views an identical copy of the application. In the administration system, the application can be administrated through the menu for any sub site that belongs to the

ENHANCE YOUR INTRANET



region. Any changes made through the administration or on the intranet website are reflected throughout all sub sites in the region. For example, *Forms Manager* is a region-specific application.

ENHANCE YOUR INTRANET



Chapter 2 : System Architecture

2.4 Applications

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

Sub site-specific Applications

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



Chapter 2 : System Architecture

2.4 Applications continued

The following is a table describing which applications are intranet-wide, region-specific and sub site-specific.

	Intranet	Region	Sub site
Business Tools			
Document Manager			✓
Meeting Room Booking		✓	
File Express	✓		
World Time	✓		
Project Space	✓		
Forms Manager		✓	
Digital Assets Library			✓
Company Calendar			✓
Who's Who Directory	✓		
Acronym Manager	✓		
Image Library			✓
Brand Manager	✓		
Employee Training	✓		
Content Management/ Publishing Tools			
Content Publisher			✓
Ad Manager			✓
Portal Push & Pull	✓	✓	✓
Layout Manager			✓
iD Themes			✓
Statistics Reporter			✓
News			✓
Power Search	✓		
Collaboration/ Communication Tools			
e-Newsletter			✓
Forum			✓
Feedback Director			✓
Quick Poll			✓
Sports Tipping	✓		
Survey Pro			✓
e-Postcards			✓
Social Club			✓

Table 1. Intranet, region and sub site specific applications

ENHANCE YOUR INTRANET



Chapter 2 : System Architecture

2.4 Applications

On the intranet website, the applications function differently. Applications such as site list and clever tools simply appear as a menu and the users cannot interact with the application in any other way.

2.5 Configuration Administration

Intranet DASHBOARD system configuration sets system wide settings and is completed as part of the installation process. Updates to the system configuration can be made post installation by open the following file in a text editor on your server. <Hard drive location the intranet is stored>\cfr\configSettings.xml.

Chapter 3 : 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 **Sub site Admin**.
 - b. Enter the details for the sub site.
 - 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 Website.
 - 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 sub sites 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 sub sites (left/right pane) - LOCK
 - 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 sub site active by modifying its status in **Sub site Admin**, the site will now be visible on the intranet website. Simply enter <http://<name of the intranet>> and the sub site should be displayed with this layout.

ENHANCE YOUR INTRANET



Chapter 4 : Setting Up Sub sites

This chapter outlines the process of setting up additional sub sites for divisions of your organisation. There is no limit to the number of sub sites that can be created. See the sub sites section in **Chapter 2: System Architecture** for further information on sub sites and sub site groups in **Intranet DASHBOARD**.

Adding a new sub site group

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

1. Select **Sub site Groups** from the **Sub sites** menu, then select **Add Sub site Group**.
2. Enter the sub site group's **Code** and **Name**.
3. Click **Next** to continue.
4. Select the applications that should be accessible to sub sites within this group. Click on the **Select All** link to select all applications. When creating a sub site 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 Sub site 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.

Sub sites - Adding a new sub site

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

1. Select **Add Sub site** from the **Sub sites** menu.
2. Enter the **Name**, **Code**, **Sub site Group**, **Folder Name** and **Language** for the sub site.
3. Select the appropriate **Status** for the sub site. (It is recommended you leave the sub site as 'staging' until the sub site has been set up.
 - **Active** means the site can be edited in the administration system and can be viewed on the intranet Website.
 - **Staging** means the site can be edited in the administration system, but is not visible on the intranet Website.
 - **Inactive** means the site cannot be edited in the administration system and is not visible on the intranet Website.

ENHANCE YOUR INTRANET

Chapter 4 : Setting Up Sub sites

Sub sites - Adding a new sub site

4. Click **Next** to continue.
5. Select the applications that will be accessible from the sub site by placing a tick in the corresponding checkboxes. You must select layout manager from the list in order to be able to make the sub site accessible on the intranet Website. 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 sub site.
8. Click **Next** to continue.
9. Tick the checkbox corresponding to 'SuperUser' if you wish them to be 'site administrator' (the owner and contact person) for this sub site. Alternatively you can set another user to be site administrator when they are added.
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 5 : 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 2: 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 **Given Name**, **Surname**, **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 **Sub site** 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 sub site. Tick selected **User Groups** within the sub site the give the user access to specific options in selected applications. Repeat this process to give the user access to multiple sub sites.
 7. Click **Next** to continue.
 8. Check that the details are correct. Click on the **Back** button to make changes to previous pages.
- 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 **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).

Licensing Details

You can download a trial version of **Intranet DASHBOARD** from www.dashboard.net.au and run it with one administration user for 30 days. At any time you can choose to buy the software by visiting the 'buy now' link in the administration system. Alternatively visit 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 user of the administration system.

ENHANCE YOUR INTRANET



Chapter 5 : Setting Up Administrators

Licensing Details

Once you have bought a license you install it into your /bin folder of **iD** by simply 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**.

Chapter 6 : Setting Up Applications

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 this link to view information about the application and how to set it up.

Recommended applications to familiarise yourself with first:

- **Nav editor** – Allows creation of a menu on the sub site webpage to help users of the intranet website navigate through the sub site.
- **Clever tools** – Gives users quick access to applications..
- **News** – Allows you to display a list of news items to users of the intranet website.
- **Feedback director** - Provides a method for users of the intranet website to communicate with administrators.

This concludes the user guide. Please contact us for any further information at support@dashboard.net.au.

A number of consulting and support packages are also available to you. Please contact sales@dashboard.net.au for further details.

Contacts

The ADWEB Agency

Technical Contact:	Intranet DASHBOARD Support Team
Postal Address:	PO Box 450 Richmond Vic 3121
Phone:	+613 9421 2960
Fax:	+613 9421 2970
E-mail:	support@dashboard.net.au

ENHANCE YOUR INTRANET

Appendix A : Glossary Quick Reference

Active Directory - A central organised database providing storage for information about the users in an organisation 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 organisation to access the administration system. Users with advanced options are superusers and administrators.

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

Administrators – A user who can manage selected applications within particular sub sites, 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.

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 organisation.

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 organisation can access or post information.

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

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

Sub site Active – The sub site can be edited in the administration system and can be viewed on the intranet website.

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

Sub site Inactive – The sub site cannot be edited in the administration system and is not visible on the intranet website.