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Part I

Introduction
1 Introduction

1.1 About this guide

_**Kentico CMS Intranet User's Guide**_ is a guide for end users of _**Kentico Intranet Solution**_, i.e. the _**Intranet Portal**_ sample website based on _**Kentico CMS**_. This guide provides information on how the solution can be used by an ordinary company employee accessing only the front-end _**Intranet Portal**_ website.

Particular chapters of this guide reflect the structure of the portal and contain information on using its individual sections. If you are new to _**Kentico Intranet Solution**_, please proceed to the _**Getting started**_ chapter: the _**Accessing the Intranet Portal**_ topic contains information on how to get logged on to the portal for the first time. After successful logon, you are redirected to the title page of the portal - the _**Home**_ page. At this point, it is recommended to read through the _**Intranet Portal overview**_ topic, which explains the purpose of particular sections of the portal, along with links to the subsequent chapters focusing on the sections in more detail.

There is another guide related to _**Kentico Intranet Solution**_ - _**Kentico CMS Intranet Administrator's Guide**_. As indicated by its name, it is intended for administrators of the Intranet Solution and it contains information on its administration and customization. Complete Kentico CMS documentation in multiple formats is available at [http://devnet.kentico.com/documentation.aspx](http://devnet.kentico.com/documentation.aspx).
Part II

Getting started
2 Getting started

2.1 Accessing the Intranet Portal

This topic provides you with information on how the Intranet Portal can be accessed and what types of authentication can be used.

User authentication

User authentication is always required to access the portal. The portal can be configured for one of the following types of authentication:

- **Forms authentication** - when accessing the portal, you are redirected to the logon page where you need to enter your user name and password.
- **Windows authentication** - when accessing the portal, you are logged on automatically based on your current Windows account. No user name and password needs to be entered.

Your system administrator should provide you with appropriate user name and password if **Forms authentication** is used. If **Windows authentication** is used, you only need to access the provided URL from a computer in your company network (logged on using your Windows user name and password) and you get logged on to the portal automatically.

Sample users and Forms authentication

To demonstrate the portal's functionality, we will use the pre-defined sample users that are shipped with the *Intranet Portal* website in the examples in this guide. Because of this fact, we also presume that the website is configured to use the default **Forms authentication**.

If you are accessing the portal using your own user account, the functionality described in the examples may be different or limited, based on configuration of permissions for your account.

Accessing the portal

1. Before accessing the *Intranet Portal* for the first time, you should be provided with the **URL of the portal** by your system administrator. It is typically something like http://intra or a similar URL. Enter the URL into your web browser's address line and press **Enter**.

2. As you are not logged on yet, you will be redirected to the ~/Logon.aspx page. For the purpose of this example, we will use one of the pre-defined sample users - **Brad Summers**. Enter BradS into the **User name** field, leave the password blank and click **Log on**.
3. You will be logged on and redirected to the **Home** page. Please proceed to the **Intranet Portal overview** topic to get a quick explanation of what you can see on the page.

### 2.2 Intranet Portal overview

In the previous topic, you have learned how the Intranet Portal can be accessed using a web browser. Once you are logged in, you are redirected to the **Home** page of the portal's global section, i.e. the title page of the whole portal. The portal is divided into three types of sections:

- **Global section** - global section accessible to all employees. This is the section whose **Home** page you have just accessed.
- **Department sections** - each department has its own dedicated website section with its own **Home** page, separate navigation, etc.
- **Workgroup sections** - each workgroup also has its own dedicated website section with its own **Home** page, separate navigation, etc.

The screenshot below depicts the **Home** page of the portal's global section, while important parts of the page are highlighted and described in the text below it.
The first three highlighted areas are common in the header of all pages of the website:

1. **Header links** - the header contains the following links:

   - `<current user's name>` - link to the current user's profile. See the Employees chapter for more details.
   - **Sign Out** - link used to log off the intranet website. Visible only if Forms authentication is used, when using Windows authentication, the link is not displayed.
   - **My Dashboard** - link to the current user's personalizable page where widgets can be added.
   - **How To** - using this link, you can access the HTML version of this guide directly from the Intranet Portal.
   - **Edit this page** - this link is only displayed to users with permissions to modify the current page. It opens the page for editing in the system's administration interface.
   - **X unread messages** - link to the current user's messaging inbox, i.e. a list of unread messages from other intranet users.
   - **X active tasks** - link to the list of projects and tasks assigned to the current user.

2. **Main navigation** - this is the main navigation menu used for switching between individual sections of the website. The items in the menu listed below are displayed when viewing the global section of the portal. Please note that the navigation contains different items when viewing a department's or workgroup's website section.
• **Home** - home page of the intranet website, as depicted in the screenshot below.

• **Company** - informational section with general information about the company and a document library for storing internal policy documents.

• **Departments** - section for company departments; each department has its dedicated sub-section of the website with its own main menu, Home page, News, Event calendar, Forums, etc.

• **Workgroups** - section for workgroups, i.e. groups of employees established (often just temporarily) to perform a certain task or to oversee some activity. Similarly to departments, each workgroup also has a dedicated sub-section with its own main menu, Home page, etc.

• **Documents** - document libraries for convenient storage of documents.

• **News** - page where news are published.

• **Events** - calendar for scheduling of events and event attendees registration.

• **Media** - media libraries where files like pictures, sound files or videos can be stored.

• **Blogs** - blogs section where each user can create their own blog and start blogging right away.

• **Forums** - discussion forums where users can discuss various topics in separate discussion threads.

• **Employees** - list of all company employees with their position and contact details, searchable by name or department.

3. **Breadcrumbs** - the breadcrumbs below the main menu indicates position of the current page within the website structure. Only **Home** is displayed in the screenshot above as the **Home** page is in the top level, but you may typically get breadcrumbs like **Departments** -> **IT** -> **Documents** etc. Clicking a page's name in the breadcrumbs redirects you to the particular page.

4. **Search box** - by entering a keyword into the field and clicking the \( \mathcal{D} \) icon, you can search for the keyword in text of pages and discussion forums. When browsing a dedicated section of a department or workgroup, only content of the particular department or workgroup will be searched. Outside these dedicated sections, all global content (all content except the content belonging to departments and workgroups) will be searched.

5. **Current page content** - the area below the search toolbar is where the content of particular intranet pages is loaded. In the screenshot, you can see the **Home** page - the title page of the portal. The **Home** page contains the following three sections:

   • **Left column** - in the left column, there are the following three boxes:
     • **Quick links** - links to the most important sections of the portal.
     • **Upcoming events** - list of upcoming events. Events defined in the **Events** section are displayed here.
     • **Canteen menu** - canteen menu for the current week.

   • **Central column** - the central column contains:
     • **Latest news** - list of the latest news published in the **News** section.
     • **Latest blog posts** - list of the latest blog posts published in the **Blogs** section.

   • **Right column** - the right column contains the following:
     • **Employee of the month** - image of the current month's best employee.
     • **Poll** - poll where you can vote to express your opinion.

You have learned about elements that are common in the header of all pages of the portal and about the default content of its **Home** page. Please proceed to the following chapters (you may use the links in the text above) to get information on particular sections of the portal.
Part III

Departments
3 Departments

3.1 Departments overview

Departments like Finance, Marketing, Sales, IT, etc. are basic organizational units of each company. The Departments section of the Intranet Portal provides a set of tools for better collaboration, communication and project management within each company department.

To demonstrate the Departments section's features in this topic, we will use Brad Summers, one of the sample users shipped with the portal. Log on using the BradS username with blank password and select Departments in the main navigation. You should see a page similar to the one depicted in the following screenshot.

As you can see, there are two lists on the page. The All departments list contains all departments of the company, while the My departments list displays only those departments that the current user is a member of. We can see that only the IT department is present in the My departments section, which indicates that BradS is a member of this department only. Click the IT department, you will be redirected to the Home page of the department's dedicated website section.

Adding new departments

Please note that new departments can not be added to the portal via the front-end website. To add a new department, please contact your system administrator to add the new department via the system's administration interface.

Each department has its own dedicated website section that only members of the department can access. The Home page that you have just accessed is the title page of the IT department's section.

You may have noticed that the main menu has changed when you accessed the department's Home
page. This happens because when you are viewing department pages, the main menu serves for navigation within the department's section, not for navigation within the global section of the portal. You can leave the department's section using the **Back to Main Portal** button in the main menu or using the breadcrumbs below the menu. The button and the breadcrumbs are highlighted in the screenshot below.

**Different color schemes**

You may have noticed that the IT department's section has a different color scheme in your installation than in the screenshots on this page. This happens because it is possible for each department to change its color scheme separately. However, this can only be done via the administration interface of the system, so please contact your system administrator in case that you want to have the color scheme of your department changed.

For an overview of default color schemes shipped with the portal, please refer to **Other features -> Available themes**.

As visible in the preceding screenshot of the department's main menu, each department consists of sections similar to the sections of the main portal (as described in **Getting started -> Intranet Portal overview**). The following text provides descriptions of each of these sections.

- **Home**
- **News**
- **Calendar**
- **Documents**
- **Media**
- **Blogs**
- **Forums**
- **Wiki**
- **Projects**
- **Members**

**Home**

The **Home** page is the title page of each department's section. Its structure is similar to the structure of the global section's **Home** page (described in **Getting started -> Intranet Portal overview**). Content of the **Home** page consists of the following three columns:

- **Left column** - in the left column, there are the following two boxes:
  - **Quick links** - links to the global section's **Home** page and to the department's **Members** and **Documents** sections.
  - **Upcoming events** - list of upcoming events. Events defined in the department's **Calendar** section are displayed in the box.
Central column - the central column contains:
- Latest news - list of the latest news published in the department's News section.
- Latest blog posts - list of the latest blog posts published in the department's Blogs section.
- Latest forum posts - list of the latest forum posts published in the department's Forums section.

Right column - the right column contains:
- Poll - poll where you can vote to express your opinion.

News

The News section serves for publishing of news whose content is specific for the particular department. These news are only published in the department's section - they are not displayed in the portal's global section. Otherwise, their viewing and management is similar to the News in the global section. Please refer to the News chapter of this guide for more details.

Calendar
The **Calendar** section provides a convenient way how events can be scheduled within a department. Scheduled events are displayed in respective day fields in the calendar, while the nearest upcoming events are also listed in the **Upcoming events** column on the right. Functionality of this section is very similar to the **Events** section of the portal's global section, while the scheduled events are only displayed in the department's calendar, not in the global one. Please refer to the **Events** chapter of this guide for more details.

**Documents**

The **Documents** section contains the department's document library. This is where various files can be stored and managed by users with appropriate permissions, or just viewed by ordinary users without these permissions. Its functionality is identical to the global section's **Documents** page, so please refer to the **Document libraries** chapter of this guide for more information.

**Media**

The **Media** section contains the department's media library, which serves for storage of various types of files. Compared to the document library described above, a media library supports folders in its structure and is primarily intended for media files or files of large sizes. Its functionality is similar to the global section's media libraries, so please refer to the **Media libraries** section of this guide for more details.
Blogs

In the Blogs section, you can find personal blogs of particular members of the department. Each department member can create their new blog in this section and start blogging immediately. Blogs created in this section are intended only for the members of the particular department - they are not displayed among the blogs in the global section. Otherwise, the functionality of this section is similar to the global Blogs section, so please refer to the Blogs chapter of this guide for more details.

Forums

The Forums section provides a convenient way of communication within the department. Besides the fact that only members of the department can access and use the department forums, the functionality of this section is similar to the global forums. Therefore, please refer to the Forums chapter of this guide for more information on how the forums can be used.
Wiki

The Wiki section serves for publishing of articles within the context of the department. By default, only the head of the department (BradS in our case) can add or edit articles in this section, while other members of the department can only view these articles. More details on this feature, which is only available in department and workgroup sections (not in the global section), can be found in Other features - Using Wikis.

Projects

The Projects section serves for management of projects carried out by the current department. New projects and tasks can be created here and assigned to individual employees. Progress of particular tasks or whole projects can be monitored in this section too. Please see the Project management chapter of this guide to learn more about this feature.

Members

The Members section contains a list of all users that are members of the current department. Using the
Search member by name filter above the list, you may search for a particular employee based on their name. By clicking an employee's name, you will be redirected to their profile page. The functionality provided by this section is similar to the Employees section of the main portal. Please refer to the Employees chapter of this guide for more information on user profiles and their management.
Part IV

Workgroups
4 Workgroups

4.1 Workgroups overview

Workgroups are organizational units composed of users that are created for the purpose of completing a certain task or overseeing some activity. They are usually only temporary and deleted once their goal is accomplished. A workgroup provides many tools that allow its members to communicate, share data and keep track of work.

To try out the features of workgroups, log in as Brad Summers (user name BradS with a blank password), one of the sample users, who has permissions to access and manage all workgroups on the portal. Now select the Workgroups section of the portal in the main navigation menu.

The displayed page contains two lists of workgroups. The My workgroups list shows the workgroups that the current user is a member of, while the All workgroups list displays all active (approved) workgroups. The order in which workgroups are displayed can be changed by clicking on one of the Sort by links. Workgroup name causes alphabetical sorting and Created uses the chronological order in which the workgroups were created. If there is a large amount of workgroups in the list, specific workgroups can be found by entering their name into the Search box.

The Create a new workgroup link above the lists can be used to add a workgroup. This process is described in the Creating a new workgroup topic.

You may have noticed that there is a lock in the background image of every workgroup. This indicates that a given workgroup may only be accessed by its members. If a workgroup is set to allow all portal users to view it, its background will be clear like in the following image.
Right-clicking a workgroup opens a context menu that offers several possible actions:

- **View workgroup** - opens the section of the portal dedicated to the selected workgroup, provided that the current user is authorized to access it. This can also be done simply by clicking on the title or image of a workgroup.
- **Join workgroup** - allows users to become members of the workgroup. In some cases, the approval of a workgroup administrator (a user who has permissions to manage the workgroup) will be required before the membership becomes valid.
- **Leave the workgroup** - members of the selected workgroup can use this action to leave it (cancel their membership).
- **Manage the workgroup** - directly accesses the management interface of the selected workgroup. This action is only available to workgroup administrators. The interface is described in the Managing workgroups sub-chapter.

When a workgroup is accessed, the main menu changes to display links to the various sections offered by the workgroup instead of showing the structure of the main portal. In some cases, the workgroup may also use a different color theme than the rest of the portal. This is because a specific theme can be set for every workgroup separately by workgroup administrators.

It is possible to leave the workgroup and return to the main portal at any time either by clicking the Back to Main Portal arrow on the left side of the menu or using the breadcrumbs navigation tool located below the menu.
Each workgroup has a structure similar to that of the main portal (as described in Getting started -> Intranet Portal overview) and is separated into sections, where the workgroup's tools and features are available. Information about individual sections can be found below:

- Home
- News
- Calendar
- Documents
- Media
- Blogs
- Forums
- Board
- Wiki
- Projects
- Members

Home

The Home section is displayed by default when a user accesses the workgroup. Administrators of the workgroup may customize the design of the Home section (as described in the Modifying a workgroup home page topic) so its exact appearance is variable, but it usually contains general information and updates on recent activity in the workgroup.
An important section that is always present on this page is the **Shortcuts** menu on the top right, which is a list of convenient links that allow users to easily reach various parts of their employee profile, as well as perform workgroup related activities. The following links are available in the list:

- **My profile** - links to the employee profile of the current user.
- **Edit my profile** - links to the editing page of the current user's employee profile.
- **My messages** - links to the messages page of the current user's employee profile.
- **My invitations** - links to the invitations page of the current user's employee profile.
- **My tasks** - links to the part of the current user's employee profile that contains a list of assigned tasks and related projects. Please refer to the Project management overview topic for more information.
- **Create a new workgroup** - allows a new workgroup to be created. This process is described in the Creating a new workgroup topic.
- **Join the workgroup** - allows users to become members of the workgroup. In some cases, the approval of a workgroup administrator will be required before the membership becomes valid.
- **Leave the workgroup** - members of the workgroup can use this action to leave it (cancel their membership).
- **Manage the workgroup** - accesses the management interface of the workgroup. This link is only available to workgroup administrators. The interface is described in the Managing workgroups topic.
- **Invite to workgroup** - opens a window that allows the invitation of users to the workgroup.
There are two ways to invite a new member:

- **Invite existing site member** - allows the selection of an existing portal user into the *User name* field. When the *Invite* button is clicked, a notification e-mail is sent to the user's e-mail address and any text entered into the *Comment* field is included in the e-mail. The user can join the workgroup either by clicking a link in the e-mail, or via the *My invitations* link in the *Shortcuts* menu found on their employee profile page.

- **Invite via e-mail** - allows the sending of an invitation e-mail to any address specified in the *E-mail* field. In this case, the user will be required to register on the portal after clicking the join link in the e-mail. Any text entered into the *Comment* field will be included in the e-mail.

**News**

This section contains a list of news items related to the workgroup, and allows news to be viewed, added or modified by users with the appropriate workgroup permissions. It is very similar to the *News* section of the main portal, but the news items here are workgroup specific. Please refer to the *News* chapter of this guide for more information.

**Calendar**
This section contains information about scheduled events relevant to the workgroup and allows them to be viewed, created and modified by users with the appropriate workgroup permissions. It is very similar to the Events section of the main portal, but the events here are workgroup specific and it is not possible to register for workgroup events. Workgroups usually represent a relatively small team of users, so a registration system is not really necessary. Please refer to the Events chapter of this guide for more information.

Documents

This section contains a document library that can be used to store or access files within the context of the workgroup. Please refer to the Document libraries chapter of this guide for detailed information on the use and management of document libraries.

Media

This section contains a list of media libraries that may contain various types of files. A library can be selected by clicking on its title or associated image.
When browsing a selected library, individual media files can be viewed or downloaded. Each library functions exactly as the Media section of the main portal. Please refer to the Media libraries chapter of this guide for more information on the use of media libraries.

Blogs

This section displays blog posts related to the activity of the workgroup, and allows new blogs, posts, and comments to be added or modified. It is nearly identical to the Blogs section of the main portal, but set into the context of the given workgroup. Please refer to the Blogs chapter of this guide for detailed information.
Forums

This section contains the forums of the workgroup, which function in exactly the same way as the forums on the main section of the portal. The difference is that their content is separate and unique for the given workgroup. Please refer to the Forums chapter of this guide for detailed information.

Board

This section contains a message board that allows users to view and post text messages. It is usually used to make quick announcements related to the activity of the workgroup. Please see the Other features -> Using message boards topic for details on using the message board.

Wiki

This section contains a list of articles related to various aspects of the workgroup, and allows them to be viewed, added or modified by users with the appropriate workgroup permissions. More details on this feature, which is only available in department and workgroup sections (not in the global section), can be found in Other features -> Using Wikis.
Projects

This section is where the projects belonging under the workgroup can be monitored and managed. Please see the Project management chapter of this guide to learn more about this feature.

Members

The Members section displays a list of all the users that are members of the workgroup and information about them. If there is a large amount of members, the Search member by name filter above the list can be used to find users by their name. Clicking a member's name displays their employee profile.

The functionality provided by this section is similar to the Employees section of the main portal. Please refer to the Employees chapter of this guide for more information on user profiles and their management.
4.2 Creating a new workgroup

The creation of a new workgroup is a simple procedure that can be performed by any employee. The following example can be used as a guide through this process:

1. Access the portal and sign in. Now navigate to the Workgroups section using the main menu and click the Create a new workgroup link.

2. You will now see the Create workgroup form. Fill in the following properties:
   - **Group name** - the name of the new workgroup that will be displayed on the portal.
   - **Description** - text describing the new workgroup.
   - **Approve members** - this selection determines if users can join the workgroup with or without a workgroup administrator's approval. The Only approved members can join option requires all new members to be approved, while Only approved members can join except for invited members allows users who accept an invitation from a workgroup member to join without approval.
   - **Content access** - this selection determines what type of users can view the content of the workgroup. Please keep in mind that if the Only group members can view the content option is selected, users cannot apply to join the workgroup and must be invited to become members.
Click **OK**.

3. The workgroup will now be created, but before it can become active on the portal, it will usually require approval from a portal administrator. Once approved, the workgroup will be displayed on the **Workgroups** section, ready to be used. As the creator of the workgroup, you will automatically be assigned as its administrator. Details about the options available to workgroup administrators can be found in the *Managing workgroups* sub-chapter.

### 4.3 Modifying a workgroup home page

The **Home** page of a workgroup contains special areas called widget zones that can be customized directly on the website by administrators of the given workgroup. The following examples will demonstrate what kind of modifications are possible:

1. Access the portal and sign in as Brad Summers (user name *BradS* with a blank password). Navigate to the **Workgroups** section and click on the **Microsoft Office upgrade** workgroup, which will bring you directly to its home page.

2. The *BradS* user account that you are using is set as the administrator of this workgroup, so it is possible to start modifying the widget zones. Hover your mouse cursor over the section of the page that is displaying news (around the **LATEST NEWS** header) and you will notice that a section of the page is now surrounded by a red dotted outline, which represents a widget zone.
The building blocks that are used to display content within these zones are called widgets and each one is designated by a black dotted outline.

3. You may have also noticed that there are buttons displayed in the corners of these zones. These can be used to administer the widgets on the page to form the design that you require for the Home section of your workgroup.

4. By default, the Home section displays quite a lot of content from the other sections of the workgroup, so start by removing the widget displaying the latest blog posts (the second one from the top in the widget zone shown in the image above), which can be done by hovering over it and clicking the Remove widget button in the top right corner of the widget outline.
Click **OK** in the confirmation dialog and the widget will be deleted from the page.

5. Next, return to the first widget in the zone that is displaying news and click its **Configure widget** button. This opens the **Widget properties** dialog, where functionality and appearance can be modified. Every widget has its own set of properties depending on its function. The following are available for the **Workgroup latest news** widget that you are now configuring:
Change the value of the **Select top N documents** property, which determines the maximum amount of displayed news items, to 1. This will cause the widget to show only the most recent news. Also notice the **Widget container** properties, which are available for most widgets and allow the selection of a predefined graphical envelope that will be displayed around the widget. You can experiment with different containers and see what kind of appearance you prefer. Confirm the configuration by clicking **OK**.

6. The location of widgets can easily be changed by using their drag-and-drop functionality. This works both for modifying the order of widgets in a zone and moving a widget to a different zone. There is a second widget zone below the **Shortcuts** menu on the right side of the workgroup home page. Hover over the **Quick links** widget at the top of this zone, click its **Drag widget** button, hold down the mouse button and drag the widget to the top of the larger widget zone on the left. The resulting page should be similar to the following image:
7. To add a new widget to a zone, click the Add widget button in its top left corner. This opens the Select widget catalog, where you can choose from available widgets.
More information about the widgets that are by default available on the portal can be found in the Intranet widgets chapter of this guide.

Click the General category in the tree on the left of the catalog, select the Text widget and click OK. The Widget properties dialog will be opened, where you can configure the properties of the new widget.

Type something into the Text field and click OK. The widget will now be added to the end of the zone, but you can move it to any other location as described in the previous step.
An alternative way of adding a new widget is by using the Add widget link at the top left of the home page.

8. If required, the entire page can be returned to its default state simply by clicking the Reset to default link.

4.4 Managing workgroups

4.4.1 Workgroup management overview

Members with the appropriate permissions (usually workgroup administrators) can manage workgroups, which means they are able to modify various types of properties and security settings, oversee workgroup membership, configure the available tools and more. The management interface can be accessed using the Manage the workgroup link in the Shortcuts menu on the right side of the Home section of a workgroup.

The following management tabs are available:

- General
- Security
- Members
- Roles
- Forums
General

On this tab, the general properties of the workgroup can be set:

- **Display name** - contains the name of the workgroup displayed on the portal.
- **Description** - contains text describing the workgroup.
- **Theme** - allows the selection of a preset graphical theme that will be used to determine the appearance of the portal section dedicated to the workgroup. By default, the themes described in the [Other features -> Available themes](#) topic may be selected.
- **Avatar** - allows the selection of the workgroup avatar image used for graphical representation.
- **Approve members** - this selection determines if users can join the workgroup with or without a workgroup administrator's approval. The *Only approved members can join* option requires all new members to be approved, while *Only approved members can join except for invited members* allows users who accept an invitation from a workgroup member to join without approval.
- **Content access** - this selection determines what type of users can view the content of the workgroup. Please keep in mind that if the *Only group members can view the content* option is selected, users cannot apply to join the workgroup and must be invited to become members.
- **Notify group admins when a user joins/leaves** - if checked, workgroup administrators will receive a notification e-mail when a user joins/leaves the workgroup.
- **Notify group admins on pending members** - if checked, workgroup administrators will receive a notification e-mail when a user requests to join the workgroup and approval is required.
- **Created by** - displays the name of the user who created the workgroup.
- **Approved by** - displays the name of the user (administrator) who approved the creation of the workgroup.
Deleting workgroups

Workgroups cannot be removed from the portal via the front-end website. Please contact your system administrator if you need a workgroup to be deleted.

Security

On this tab, the displayed matrix can be used to set permissions for the workgroup. These permissions affect things such as managing news, calendar events and wiki pages under the various sections of the portal.
workgroup. Blogs are not affected by these settings and can be created by any user with access to the workgroup. Each blog can only be managed by the user who created it. Security settings for the tools supported by workgroups can be configured individually in their appropriate interface.

The following permissions can be assigned:

- **Create pages** - users with this permission can create workgroup pages.
- **Delete pages** - users with this permission can delete workgroup pages.
- **Edit pages** - users with this permission can edit workgroup pages.

These permissions can be assigned to the following types of users:

- **Nobody** - nobody can perform the action.
- **All users** - all users can perform the action.
- **Authenticated users** - only signed-in users can perform the action, i.e. anonymous public users cannot perform it.
- **Group members** - only workgroup members can perform the action.
- **Authorized roles** - only members of the workgroup that are assigned to the roles selected in the section below can perform the action.

### Workgroup administrator permissions

Workgroup members that are assigned to roles that have the **Can manage the group** property enabled (such members are usually referred to as workgroup administrators) can perform any of these actions, even if they don't have the appropriate permissions assigned.

### Members

On this tab, a list of all workgroup members is displayed. They can be **Edited** or **Deleted** from the list. This is also where new members can be **Approved** to join the workgroup if it is required. Members can also be **Rejected** from the workgroup. Once rejected, a user is no longer a member of the workgroup until approved again, and cannot rejoin or be invited.
The green Invite to group link located above the list conveniently allows new members to be invited to the workgroup. When clicked, a new window is opened.

There are two ways to invite a new member:

- **Invite existing site member** - allows the selection of an existing portal user into the User name field. When the Invite button is clicked, a notification e-mail is sent to the user’s e-mail address and any text entered into the Comment field is included in the e-mail. The user can join the workgroup either by clicking a link in the e-mail, or via the My invitations link in the Shortcuts menu found on their employee profile page.
- **Invite via e-mail** - allows the sending of an invitation e-mail to any address specified in the E-mail field. In this case, the user will be required to register on the portal after clicking the join link in the e-mail. Any text entered into the Comment field will be included in the e-mail.

When Editing a member, information about the given member is displayed and several actions may be performed. The Comment field can be used to enter a text description for the workgroup member. This comment is not shown to the member, it is only displayed in the workgroup management interface.
The Add roles button on the right opens a dialog where the edited member can be assigned to any of the workgroup's roles. The Approve and Reject buttons perform the respective action as described above.

Roles

On this tab, a list of roles defined for the workgroup is displayed. These roles are applicable only in the context of the workgroup and do not affect the remainder of the portal. The roles in the list can be Edited (✓) and Deleted (✗).

The New role link above the list allows new workgroup roles to be created. When clicked, a dialog where the following properties can be entered is displayed:

- Role display name - contains the name of the role that will be used in the management interface.
- Role description - contains text describing the role.
- Can manage the group - if enabled, members of the role can manage the workgroup and are not affected by workgroup permissions.
When Editing a role, two tabs are offered. The General tab allows the modification of the properties described above that were entered when the role was created. The Users tab contains a list of all members assigned to the role. These can be removed from the role by selecting the checkbox on the left of each member in the list and clicking the Remove selected button. New users can be added to the role using the Add users button.

### 4.4.2 Managing workgroup forums

By default, each newly created workgroup contains one forum group and one pre-defined forum with default settings in the forum group. On the Forums tab of the management interface, the workgroup's forums can be defined and configured. The forum structure displayed on this tab is reflected in the actual Forums section of the workgroup. Please read the Forums chapter of this guide first if you are unfamiliar with the basics of using forums on the portal.

On the first level of the structure are objects called forum groups, which contain individual forums.

A new forum group may be added using the New forum group link and existing forum groups are listed below. They may be Edited or Deleted. Using the Move up or Move down actions changes the order in which the forum groups are shown on the Forums section of the workgroup.

Two further tabs are shown when editing a forum group. The General tab contains the following properties which serve to identify the forum group:

- **Group display name** - the name of the forum group displayed in the workgroup management interface and on the Forums section.
- **Description** - a text description of the forum group.

The remaining properties on the tab are used to configure the behaviour of the group's forums. By default, all forums belonging under the forum group inherit the values of these properties, but they may be overridden for individual forums:

- **Require e-mail addresses** - indicates whether an e-mail address should be required from forum post authors.
- **Display e-mail addresses** - indicates whether the e-mail address of the post author should be
displayed to other users.

- **Use security code (CAPTCHA)** - indicates whether users need to retype a security code from a distorted image before they are allowed to add a new post. This feature helps avoid spam in the forums.

- **Forum type** - determines the overall type of the forum. The following three types may be selected:
  - **User can choose** - when creating a new forum thread, users are allowed to choose one of the following types.
  - **Discussion forum** - threads use a format suited for a typical discussion on a given topic. All forums on the Intranet portal use this format by default.
  - **Question-Answer forum** - threads use a format where the initial post is a question and the following ones are attempts to answer it. Includes a helpfulness voting feature.

- **Minimum votes to mark post as answer** - determines the minimum amount of votes that a post must receive before it is marked as an answer in Question-Answer type forums.

- **Maximum image side size** - sets the maximum side size in pixels of images inserted into forum posts. If a larger picture is included in a forum post, it will be resized so that its larger side is equal to the entered value.

- **Attachment max. file size (kB)** - sets the maximum file size of forum post attachments in kB.

- **User can edit own posts** - indicates whether users are allowed to edit their own existing posts.

- **User can delete own posts** - indicates whether users are allowed to delete their own existing posts.

The properties at the bottom determine which BB code macros may be used by forum users to format text of forum posts. The following table lists these properties, while the icon of the related action in the WYSIWYG editor toolbar, an example of text within the macros and a description of the macro’s effect is listed with each property.

<table>
<thead>
<tr>
<th>Property on the General tab</th>
<th>Icon</th>
<th>Example</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable links in posts</td>
<td>![icon]</td>
<td><img src="http://example.org/" alt="url" />[url] <img src="http://example.com" alt="url=http://example.com" />Example[url]</td>
<td>Makes the text a link leading to the URL. One of the following three options can be selected: No - the macros are not functional and the icon is not displayed Simple dialog - clicking the icon displays a simple dialog where the URL of the link can be entered manually Advanced dialog - clicking the icon displays the Insert link dialog where the URL can be selected in various ways.</td>
</tr>
<tr>
<td>Enable image macros in posts</td>
<td>![icon]</td>
<td><img src="http://www.example.com/img.bmp" alt="img" /> <img src="http://www.example.com/img.bmp" alt="img=200x50" /> <img src="http://www.example.com/img.bmp" alt="img=200" /></td>
<td>Displays an image located at the URL. The optional parameter resizes the image. It can be added either in format <code>&lt;width&gt;x&lt;height&gt;</code> or <code>&lt;max side size&gt;</code>. One of the following three options can be selected: No - the macros are not functional and the icon is not displayed Simple dialog - clicking the icon</td>
</tr>
<tr>
<td>Feature</td>
<td>Syntax</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Enable quote macros in posts</td>
<td>[quote]quoted text[/quote] [quote=Administrator]quoted text[/quote]</td>
<td>Displays text in a grey box; used for quotations. The optional parameter displays Administrator wrote: and the quoted text on a new line.</td>
<td></td>
</tr>
<tr>
<td>Enable code snippet macros in posts</td>
<td>[code]code example[/code]</td>
<td>Displays text in monospaced format; used for code snippets.</td>
<td></td>
</tr>
<tr>
<td>Enable bold font macros in posts</td>
<td>[b]bold text[/b] [strong]bold text[/strong]</td>
<td>Makes the text bold.</td>
<td></td>
</tr>
<tr>
<td>Enable italics font macros in posts</td>
<td>[i]italicized text[/i] [em]italicized text[/em]</td>
<td>Makes the text italic.</td>
<td></td>
</tr>
<tr>
<td>Enable underline font macros in posts</td>
<td>[u]underlined text[/u]</td>
<td>Underlines the text.</td>
<td></td>
</tr>
<tr>
<td>Enable strike font macros in posts</td>
<td>[s]strikethrough text[/s]</td>
<td>Strikes the text through.</td>
<td></td>
</tr>
<tr>
<td>Enable font color macros in posts</td>
<td>[color=red]Red Text[/color] [color=#ff0000]Red Text[/color]</td>
<td>Sets the text color.</td>
<td></td>
</tr>
</tbody>
</table>
The **Forums** tab contains a list of all the forums under the edited forum group. The available actions are the same as for forum groups, except that they are applied to the forums within the edited group. A new forum can be created under the forum group using the **Add forum** link.
When Editing an individual forum, a third set of tabs is displayed. These are described below:

**Posts**

The threads and posts contained in the edited forum can be managed on this tab. The left part of the tab displays a content tree representing the structure of posts in the forum and on the right is a section that allows various actions to be performed.

When the tab is first accessed, the root of the forum in the content tree is selected, which allows a new thread to be created. The process for creating posts on this tab is the same as when doing so directly on a forum (this is described in the Forums -> Using forums topic).

If an individual post is selected from the content tree, the following actions can be performed:

- **Edit** - opens the selected post for editing.
• **❌ Delete** - removes the selected post.
• **💬 Reply** - allows a reply to the selected post to be created.
• **📌 Stick thread** - marks the thread as sticky so that it will be displayed at the top of the forum. Only available if the first post of a thread is selected.
• **✂️ Split thread** - moves the selected post and its replies to a new separate thread.
• **🔒 Lock thread** - locks the thread so that posts can no longer be added to it. Only available if the first post of a thread is selected.
• **🚫 Reject** - rejects the selected post so that it is not visible by regular user until it is approved again.
• **🚫 Reject sub-tree** - performs the **Reject** action for the selected posts and all replies to it.
• **✔️ Approve** - approves the selected post.
• **✔️ Approve sub-tree** - performs the **Approve** action for the selected post and all replies to it.

### General

On this tab, the basic properties of the forum can be set:

• **Forum display name** - contains the name of the forum.
• **Description** - text describing the forum.
• **Forum is open** - if checked, the forum normally. If not, the forum will not be visible on the workgroup's **Forums** section.
• **Forum is locked** - if checked, new posts cannot be added to the forum. The forum however remains accessible for viewing.

The remaining properties are the same as those available on the **General** tab of the forum group. By default, their values are inherited from the settings of the forum group, but individual values of properties can be entered for the edited forum after the appropriate **Inherit from forum group** boxes on the right are unchecked.
Subscriptions

This tab contains a list of e-mail addresses that are subscribed to receive notifications about new posts on the forum. If the subscription only applies to a specific post and not the entire forum, the name of the thread that contains the given post is also displayed. A subscription can be added using the **New subscription** link and existing subscriptions in the list may be **Edited** or **Deleted**. If there is a large amount of subscriptions, they can be filtered by **E-mail address**.

When adding or editing a subscription, the address of a subscriber can be specified simply by entering an address into the **E-mail** field.

If the **Send confirmation e-mail to subscriber** box is checked, a confirmation e-mail will be sent to the address when the **OK** button is clicked, informing the recipient that they have been subscribed.
Moderators

On this tab, it is possible to set the edited forum to be moderated by checking the **Forum is moderated** box. If a forum is moderated, all new posts are created in the rejected state and must be approved by a forum moderator before becoming visible. Members of the workgroup can be designated as moderators via the **Add users** button, or removed from the position by using the appropriate checkbox and clicking **Remove selected** button. Moderators receive automatic notification e-mails whenever a new post that requires their approval is added to the forum.

Security

On this tab, the displayed matrix may be used to set permissions for the edited forum. These permissions define which actions users are allowed to perform on the forum. The following may be assigned:

- **Access to forum** - users with this permission may enter the forum and view its posts.
- **Attach files** - users with this permission are allowed to attach files to forum posts.
- **Mark as answer** - users with this permission can mark posts as answers in **Question-Answer** type forums.
- **Post** - users with this permission are allowed to create new threads in the forum.
- **Reply** - users with this permission can reply to existing forum posts.
- **Subscribe** - users with this permission can subscribe to the forum or its posts to receive e-mail notifications.
notifications about new posts or replies.

These permissions can be assigned to the following types of users:

- **Nobody** - the action cannot be performed by anyone.
- **All users** - anybody can perform the action.
- **Authenticated users** - only registered and signed-in users of the portal can perform the action.
- **Group members** - only members of the workgroup that contains the forums can perform the action.
- **Authorized roles** - only members of the workgroup that are assigned to the workgroup roles selected in the section below can perform the action.

The **Allow user to change the name** checkbox below the permission matrix may be used to determine whether forum users are allowed to change the name that is displayed above their posts, or if their portal user name is always used.

Please be aware that moderators automatically have full permissions for the forum.

### 4.4.3 Managing workgroup media libraries

By default, each newly created workgroup contains one pre-defined media library with default settings. On the **Media libraries** tab of the management interface, the workgroup's media libraries can be managed. The libraries listed here can be viewed in the **Media** section of the workgroup.

Existing media libraries in the list may be **Edited** (✍️) or **Deleted** (❌) and new libraries can be created by clicking the **New media library** link above the list. The following properties may be entered when adding a library:
- **Display name** - contains the name of the library.
- **Description** - contains text describing the library.
- **Teaser image** - may be used to set an image to serve as the visual representation of the library. The image can be uploaded from a local disk using the *Browse...* button. This image is visible on the Media section of the workgroup.
- **Folder name** - the name of the folder that is used to store the library's media files.

When editing a media library, the interface is divided into three tabs as described below:

### Files

This tab is used to define the folder and file content of the edited media library.
It is recommended to use sub-folders to organize files into logical categories. The left section of the tab displays the folder structure of the media library in a tree and allows folders to be managed using the following action buttons:

- **New folder** - opens a dialog that allows a new folder to be created under the currently selected folder.
- **Delete** - removes the currently selected folder.
- **Copy** - creates a copy of the selected folder and its content at a specified location within the file structure of the library.
- **Move** - allows the selected folder to be moved to a different location within the file structure.

When a folder is selected from the tree, the files that it contains are displayed on the right side of the page. The **List**, **Tiles** and **Thumbnails** buttons at the top may be used to change the view mode used for the file list. If there are many files in the folder, it may be necessary to filter them by entering the requested file name into the **Name** field clicking the **Search** button.

A new file can be uploaded to the selected folder by clicking the **New file** button above the folder tree.
This opens a standard dialog that allows a file to be selected from a local disk. Only certain types of files can be uploaded into the libraries, based on configuration performed by the system administrator.

The following actions can be performed by clicking the icons next to individual files:

- **Select** - selects the given file and opens its editing interface in the bottom section of the page.
- **View** - downloads the file and opens it in the default application for the file type.
- **Edit** - this icon is only available for image files and when clicked, the given image gets opened in the built-in image editor. The image editor is described below.
- **Delete** - removes the given file from the media library.
- **Update** - replaces the given file with a different file selected from a local disk. The original file is removed from the library.

Certain actions may also be applied to multiple files at once by using the checkboxes on the left to mark the desired files, selecting an action from the drop down-list below the displayed files and clicking **OK**. The following actions can be performed like this:

- **Copy** - creates copies of the selected files and allows them to be placed into a different folder.
- **Move** - allows the selected files to be moved from the current folder into a different one.
- **Delete** - removes all selected files from the media library.
- **Import** - registers the selected files in the database of the Intranet portal. This action is only necessary if files are uploaded to the media library externally without the use of the portal interface.

When a specific file is selected, its properties may be changed using the three tabs in the bottom section of the page. The **File** tab provides links to the selected file and displays how it will appear in the library. Audio and video files may be played here. The **Thumbnail** tab allows an image to be uploaded, which will represent the selected file in the media library. Thumbnails are typically set for non-image files.
only, since images can serve as their own visual representation. The Edit tab may be used to change the name of the file, alter the title displayed to users when they view the file in the library and add a text description.

**Supported media file types**

The following file types are supported and can be played or displayed within a media library:

- **Images**: bmp, gif, png, wmf, jpg, jpeg, tiff, tif
- **Audio**: wav, wma, mp2, mp3, mid, midi, mpga
- **Video**: avi, mp4, mpg, mpeg, wmv, qt, mov, rm
- **Flash**: swf

All other file types will be recognized as documents, which means that they cannot be displayed or played, but they may still be stored in the library and downloaded by users.

**Image editor**

When Editing an image file, the current appearance of the image can be viewed on the right and various editing actions are available via the menu on the left. Individual menu tabs are described below.

- **Resize** - allows the size of the image to be changed, either relatively or to an absolute size in pixels.
- **Rotation** - allows the image to be rotated.
- **Convert** - allows the file type of the image to be changed.
- **Trim** - allows the size of the image to be reduced to a specific size by removing its borders.
- **Color** - allows the image to be converted into grayscale. If this is performed, the image becomes black and white. Every color in the image is converted into a certain shade of gray.
• Properties - displays information about the image file and allows its name to be changed.

General

On this tab, the basic properties of the media library can be set. These are the same as those available when creating a new library as described above.

Security

On this tab, the displayed matrix may be used to set permissions for the edited media library. Because adding of files into media libraries is only possible via the system's administration interface, only the following two permissions affect the media libraries displayed in the Media section of the workgroup:

• Create file - users with this permission may upload files to the media library. However, default Intranet portal workgroups do not allow files to be uploaded on their Media section, so this permission has no effect unless the section is customized by portal administrators.

• See library content - users with this permission are allowed to access and view the content of the media library.

These permissions can be assigned to the following types of users:

• Nobody - the action cannot be performed by anyone.
• All users - anybody can perform the action.
• Authenticated users - only registered and signed-in users of the portal can perform the action.
• Group members - only members of the workgroup that contains the media library can perform the action.
• Authorized roles - only members of the workgroup that are assigned to the workgroup roles selected in the section below can perform the action.
Administrators of the workgroup automatically have full media library permissions.

4.4.4 Managing workgroup message boards

By default, each newly created workgroup contains one pre-defined message board with default settings. The location of the board is defined by the system administrator and can not be changed without access to the system's user interface. On the Message boards tab of the management interface, the workgroup's message board can be managed by using the Edit ( Edit ) action. If the board is Deleted ( X ), all existing messages on it will be removed. The board will be created again when a new message is added by a user in the workgroup's Board section.

A description of the sub-tabs that the message board editing interface is divided into can be found below:

Messages

A list of all messages on the board is displayed on this tab. Messages can be added to the board directly from the management interface using the New message link. Below it is a filter, which may be used to determine which messages are shown in the list according to specified criteria. The following filtering parameters are available:

- **User name** - only messages posted by users whose names contain the entered text will be displayed.
- **Text** - only messages containing the specified text will be shown.
- **Is approved** - can be used to choose whether approved, rejected or both types of messages are displayed.
- **Is SPAM** - can be used to choose whether messages marked as SPAM should be shown.

Messages in the list can be Edited ( Edit ) or Deleted ( X ). The Approve ( ✓ ) or Reject ( ◐ ) actions can be used to switch between the two possible states of a message. Rejected messages are only visible by moderators of the board. These actions can also be performed for multiple messages by checking the
boxes next to the desired messages, then choosing an action from the drop-down list at the bottom of the page and clicking the **OK** button.

When editing or creating a message, the following fields can be filled in:

- **Name** - the name that is displayed above the new message.
- **Your URL** - if entered, the name of the message author will serve as a link to this URL.
- **Your e-mail** - the e-mail address of the message author.
- **Message** - the text content of the message.
- **Is approved** - if checked, the message is approved, otherwise it is rejected. New messages created through the management interface are automatically approved.
- **Is SPAM** - if checked, the message will be marked as spam and will not be visible by regular users.

**General**

On this tab, the basic properties of the message board can be set:

- **Display name** - contains the name of the board.
- **Description** - text describing the message board.
- **Enable** - if checked, the board works normally. If not, the board will not be visible on the workgroup's **Board** section.
- **Open** - if checked, adding new messages to the board is allowed. If not, messages can only be read. This restriction does not apply to the management interface.
- **Open from / to** - using these fields, you can define the time interval during which messages can be added to the board. Clicking the **Now** link enters the current time into the given field. Alternatively, the **Choose date/time** button may be used to select a specific date and time from a calendar.
- **Enable subscriptions** - if checked, users can subscribe to the board and receive e-mail notifications about new messages.
- **Require e-mail addresses** - if checked, users are required to enter their e-mail address when posting board messages.

### Moderators

On this tab, it is possible to set the board to be moderated by checking the **Message board is moderated** box. If a board is moderated, all new messages are created in the rejected state and must be approved by a board moderator before becoming visible. Members of the workgroup can be designated as moderators via the **Add users** button, or removed from the position by using the appropriate checkbox and clicking **Remove selected** button. Moderators receive automatic notification e-mails whenever a new message that requires their approval is added to the board.
Security

On this tab, the security related properties of the message board can be set.

If the Use security code (CAPTCHA) box is checked, users will have to retype a security code from a distorted image before they are allowed to add a new message.

The Allow comments to section can be used to define what type of users should be allowed to add messages to the board. The following options are available:

- **All users** - everyone is allowed to add messages to the board.
- **Only authenticated users** - only signed-in users are allowed to add messages to the board.
- **Only group members** - only members of the workgroup that contains the board are allowed to add messages to the board.
- **Only group admin** - only administrators of the workgroup are allowed to add messages to the board.
- **Only authorized roles** - only members of the workgroup roles specified in the area below are allowed to add messages to the board. The authorized roles can be managed using the Add roles and Remove buttons.
Subscriptions

This tab contains a list of e-mail addresses that are subscribed to receive notifications about new messages on the board. A subscription can be added using the New subscription link and existing subscriptions in the list may be Edited (✓) or Deleted (✗). If there is a large amount of subscriptions, they can be filtered by E-mail address or User name.

When adding or editing a subscription, the address of a subscriber outside of the workgroup can be specified by selecting Anonymous user and simply entering an E-mail address.

An existing workgroup member may be subscribed by selecting Registered user and using the Select button. Once a member is selected, the e-mail address specified in their employee profile will automatically be filled into the E-mail field. If required, an alternate address may be entered manually.
4.4.5 Managing workgroup projects

On the Projects tab of the management interface, the workgroup's projects can be managed in a similar way as in the Projects section of the workgroup. The available actions are described in the Project management -> Creating a new project topic.

However, when creating a project or editing it on the General tab using this interface, it is important to ensure that the additionally available Project page property is correctly filled in. This property specifies the workgroup page that the project will be bound to and displayed on.
The property can be set using the **Select** button, which opens the following dialog.

For the default workgroup structure, the **Projects** page of the given workgroup should **always** be selected as marked above. A different page should only be selected if the workgroup has more than one section for managing projects and you wish to specify which of them should be used. This is not the case with the default Intranet Portal workgroups.
Part V

Document libraries
5  Document libraries

5.1  Document libraries overview

Document libraries provide a convenient way how documents can be stored on the Intranet Portal. This topic describes where document libraries are located on the portal and how they can be used by ordinary users who can only open documents stored in the libraries. The Managing files in document libraries topic provides information on how the libraries can be used by users with document management permissions.

To see how an ordinary company employee without document management permissions can use the libraries, log on to the portal as Sean Gaines (user name SeanG with blank password), who is one of the sample users without document management permissions.

Where are the libraries located?

Global document libraries, i.e. document libraries available to all users of the portal, can be accessed by selecting Documents in the main menu of the portal's global section. There are four separate libraries called E-books, Marketing, Strategy and IT on the page (only the first two of them are displayed in the screenshot below).

Another document library accessible to all employees is located in the Company section, on the Internal Policy page. As you can see in the screenshot below, there is only one document library on the page and its purpose is to store internal policy documents.
Apart from these global document libraries, each department and workgroup also has its own dedicated document library, accessible only to members of the department or workgroup. These libraries can be accessed through the main navigation within each department's or workgroup's dedicated website section. Please refer to the Departments and Workgroups chapters for more details.

**How can the documents be opened?**

A standard company employee can only open the documents stored in the libraries. This is achievable by clicking a document's name in the library listing.

Clicking the name opens the browser's standard File Download dialog. Using this dialog, you can either open the document directly, or save it to your local disk.

Users with document management permissions can perform other actions in the libraries, like uploading new documents, editing the existing ones, etc. For more details on these possibilities, please refer to the Managing files in document libraries topic.
5.2 Managing files in document libraries

In the previous topic, you have learned where document libraries are located in the portal and how they can be used by ordinary company employees without document management permissions. This topic provides information on the various management possibilities that are available to users with certain permissions.

To demonstrate the document management possibilities, we will use Brads Summers (user name BradS with blank password), one of the sample users who has full management permissions for the global document libraries.

Permissions for particular actions

In this topic, document management possibilities are explained using Brad Summers. This account has full permissions for all actions that can be performed in the libraries.

Please note that in a real-world scenario, not all actions explained in this topic may be available to you based on permissions assigned to your account by the system administrator.

When a new document library is created, there are no files in it, so live site users can only see the following two links at the top.

- New document
- Library permissions

Once some files are uploaded in the document library, live site users can perform the following actions with the documents:

- Edit
- Update
- Localize
- Copy
- Delete
- Open
- Properties
- Permissions
- Version history
- Workflow actions

These actions can be executed from a context menu, which is accessible by right-clicking anywhere in a document's row, or by left-clicking the down-arrow to the left of a document's name (as highlighted in the screenshot below).
The following text explains particular actions that can be performed in a document library:

**New document**

Clicking the **New document** link in **Internet Explorer** or **Mozilla Firefox** directly opens the browser's file selection dialog. By selecting a file from a local disk and clicking **Open**, the file will be uploaded into the document library.

**Library permissions**
Clicking the **Library permissions** link opens a dialog for document library permissions configuration. Using the **Add users** and **Add roles** buttons, you can add users or roles into the **Users and Roles** listing. After selecting a user or role in the listing, you can grant or deny particular permissions to them using the check-boxes in the **Access rights** section. Please refer to the Configuring permissions topic for more details on particular permissions.

![Document permissions dialog]

**Edit**

The **Edit** action is only available if **WebDAV integration** is enabled by the system administrators. It opens the file in a client application for direct editing (for example, .docx documents get opened in MS Word, as you can see in the screenshot below). WebDAV editing is only possible if there is an application installed on the client machine that supports WebDAV editing of the particular file type.

![Edit screenshot]

**Update**
Selecting the Update action opens the browser's file selection dialog. Selecting a file from a local disk and clicking Open in the dialog replaces the original file with the selected one. In Apple Safari and Opera, there is one extra dialog displayed before the browser's file selection dialog. Please refer to the New document paragraph above for more details.

![File selection dialog](image)

Localize

The Localize option is only displayed on multilingual sites when the document library is configured to display documents from the default website culture if there is no version of the document in the current culture. The action is only displayed with these default-culture documents. Clicking the action opens the dialog depicted in the screenshot below, which serves for creation of a new language version of the selected document in the current culture.
The **Copy** action creates a copy of the file in the same document library. As only flat structure of document libraries is currently possible, a different file name needs to be entered for the copy, while the "- Copy" suffix is offered to be added to the file name automatically. When copying a linked document (marked with the flag), the copy will be a standard document, not a linked one.

**Delete**

Clicking the **Delete** action opens the dialog depicted below. Using the dialog, you can remove the document from the document library. On multilingual websites where more than one language version of the document exists, the **Delete all culture versions of the specified document** check-box is displayed in the dialog. If you delete the document with the check-box enabled, all cultural versions of the document will be deleted.
Open

The Open action works similarly as a standard file download link. The web browser's standard file download dialog is displayed and you can either open the document or save it to a local disk. The same behavior can be expected when you click the document's name in the library listing.

Properties

The Properties action opens a dialog where properties of the document can be configured. The following fields are available in the dialog:

- **File name** - name of the file displayed in the document library listing.
- **Description** - text description of the document.
- **File** - the actual document file. The following actions are available with the documents:
  - **Edit** - available only with image files. Opens the image for editing in a built-in image editor.
  - **Update** - the same as the Update action described above.
  - **Edit in client application** - the same as the Edit action described above.
  - **Publish from** - date and time from when the document will be visible in the library.
  - **Publish to** - date and time until when the document will be visible in the library.

Values entered into the **File name** and **Description** fields can be checked for typos using the Spell check button above the form. Clicking the Save button saves changes made to the document in the dialog. Standard workflow actions are also displayed above the form.
The text filled in the Description field is displayed in a tooltip when the mouse pointer is placed above the document.

Permissions

The Permissions action opens a dialog for configuration of permissions for the particular document. Using the Add users and Add roles buttons, you can add users or roles into the Users and Roles listing. After selecting a user or role in the listing, you can grant or deny particular permissions to them using the check-boxes in the Access rights section. Please refer to the Configuring permissions topic for more details on particular permissions.
Version history

Clicking the **Version history** action displays an overview of the document’s versions. The following actions are available with each of the listed versions:

- **View** - displays an overview of the document’s content with the possibility of side-by-side comparison of versions.
- **Rollback** - rolls back any changes made since the particular version of the document.
- **Delete** - deletes the old version.

Clicking the **Destroy history** button deletes all versions of the document except the current one.

The following screenshot shows the side-by-side comparison of two document versions that is accessible by clicking the **View** icon and selecting a version with which you want to compare in the highlighted **Compare to** drop-down list.
Workflow actions

If there is a workflow configured for documents in a document library, standard workflow actions are displayed at the bottom of the context menu, depending on workflow configuration and the current workflow step of the document:

- **Submit to approval** - Submits the document for approval to the subsequent workflow step.
- **Approve** - Approves the document and switches it to the subsequent workflow step.
- **Reject** - Rejects the document and switches it back to the previous workflow step.
- **Archive** - Switches the document to the Archived step.
- **Check out** - Checks the document out for editing. While checked out, the document can not be edited by other users. Checked-out documents are marked with the icon in the document library listing (as can be seen in the screenshot below).
- **Check in** - Checks the modified document in after editing, so that other users can edit it again.
- **Undo checkout** - Takes back the check-out, while changes made to the document are not saved.

1 for these actions to be available, the user must also be in one of the roles that are allowed to approve/reject the document in the current workflow step or have the Manage workflow permissions for all content

2 these actions are only available if the workflow applied to the document is configured to use check-in/check-out
5.3 Configuring permissions

In the Managing files in document libraries topic, you have learned which actions may be performed by in the document libraries by users with appropriate permissions. It is possible to configure permissions directly in the document libraries. This can be performed either for all documents by selecting the Library permissions action, or for each particular document by selecting Permissions from its context menu.

Both actions open the dialog depicted in the following screenshot. Using the Add users and Add roles buttons, you can add users or roles into the Users and Roles listing. After selecting a user or role in the listing, you can grant or deny particular permissions to them using the check-boxes in the Access rights section.

The table below explains which permissions can be granted to users or their roles in the two dialogs.

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<thead>
<tr>
<th>Action</th>
<th>Read</th>
<th>Modify</th>
<th>Create</th>
<th>Delete</th>
<th>Destroy</th>
<th>Modify permissions</th>
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<td>New document</td>
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<td>Version history</td>
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<td>Archive</td>
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<tr>
<td>Undo checkout</td>
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</tbody>
</table>

1 The **Destroy** permission is required for the user to be able to delete particular versions or the whole version history.

2 For these actions to be available, the user must also be in one of the roles that are allowed to approve/reject the document in the current workflow step or have the **Manage workflow** permissions for all content (this permission can only be granted to the user by the system administrators).

3 These actions are only available if the workflow applied to the document is configured to use check-in/check-out.
Part VI

News
6 News

6.1 News overview

The News section is designed to inform the users of the Intranet Portal on various issues.

The section can be accessed from the main menu by clicking the News button. Individual news items are written by the company employees and other persons who have access to the portal and were assigned special rights. The items are organized in the form of list where the title and teaser of the news item are displayed together with its summary. Even though the content of the news is primarily aimed at business activities of the company, there are in fact no limitations as to the orientation of the section. News titles or headlines work as links that lead directly from the section main page to the news items pages. Here you can not only read the actual item together with some additional text if available. You can also manage the item as long as you were assigned appropriate rights by the portal administrators.

To demonstrate the News section's features, we will use Luke Hillman, one of the sample users shipped with the portal. Log on using the LukeH username with blank password and select News in the main navigation. You should see a page similar to the one depicted in the following screenshot.

The main page of the News section is taken up by the interface that is used to display the list of news items. The colored background contains the news headline together with the news release date. The teaser image of the news together with its summary are placed below the colored background.

There are two ways how to deal with news on the Intranet Portal:

- News can be read by anyone who has access to the portal.
- News can be managed only by users who were assigned appropriate rights.

Apart from these global news items, each department and workgroup also has its own dedicated news
items, accessible only to members of the department or workgroup. These items can be accessed through the main navigation within each department's or workgroup's dedicated website section. Please refer to the Departments and Workgroups chapters for more details.

Reading news

If you would like to read news on the portal, choose News from the main menu and you will see a list of news items displayed on the main page of the News section. If you would like to read a particular news item in detail, click on its title and you will be redirected to the news item page. Besides the name, teaser and summary of the news item displayed in the list, you have now access also to the main text if available. What is more, it is possible to subscribe to news using RSS feeds by clicking on the icon beside the caption of the section. If you would like to learn more about RSS feeds available on the Intranet Portal, please refer to Other features -> RSS feeds.

6.2 Managing news

Users who were assigned appropriate rights can not only read news published in this section, they can also add new news and edit and delete the existing ones.

The following examples demonstrate how the actions available to users assigned special rights can be carried out.

Adding news

Here you will learn how to add new news items to the Intranet Portal.

1. If you need to add news to the Intranet Portal, access the portal and sign in. Now navigate to the News section using the main menu and click the Add news link on the main page of the section.

2. This displays the dialog used for the creation of a new news item.
The following fields are available to define the news:

- **News Title** - the title of the news displayed on the portal; a required field.
- **Release Date** - the release date of the news displayed on the portal; a required field. You can click the **Now** link to insert the current date or you can click the ![icon](calendar_icon) icon to choose the date from the calendar.
- **News Summary** - the summary of the news displayed in the list of news on the main page of the News section, a required field.
- **News Text** - the text of the news displayed in the detail view of the news; an optional field.
- **Teaser** - the teaser (preview) image of the news. It is displayed together with the summary and detail of the news; an optional field. Click the ![Upload file](icon) link to upload the image from the local or network file system.
- **Publish from** - the date and time when the news will be published on the portal; an optional field. If you leave this value blank, the news will be published right after its saving. You can click the **Now** link to insert the current date and time or you can click the ![icon](calendar_icon) icon to choose the date and time from the calendar.
- **Publish to** - the date and time until when the news will be published on the portal; an optional field. You can click the **Now** link to insert the current date and time or you can click the ![icon](calendar_icon) icon to choose the date and time from the calendar.

You can use the built-in WYSIWYG editor to edit the **News Summary** and **News Text** fields. The WYSIWYG editor is used in various parts of the portal and you can learn more about it in Other features -> WYSIWYG editor.

You can optionally click the ![Spell check](spell_check_icon) button; the spell-checker will check the content of the news.
summary and news text and if it finds any mistake, you will be allowed to decide whether to ignore the word, add it to the dictionary or replace it with the suggested word.

When you have all values entered, click **Save** to save the new news item. You will immediately find it listed among other news below the news properties form.

4. Finally, you can click the **List of news** link to view your new contribution in the list of news on the main page of the section.

Please note that the last added news items are displayed on the Intranet Portal Home page.

**Editing news**

Here you will learn how to edit news items on the Intranet Portal.

1. News items on the Intranet Portal can have been added by yourself or any other user of the portal assigned special rights. If you need to edit some of them and have the appropriate rights, access the portal and sign in. Now navigate to the **News** section using the main menu and click on the title of the news in the list of news items. On the page where you will be redirected to, click the **Edit news** link.

2. This displays the dialog used for the editing of an existing news item.
The fields available for the news, same as the spell check feature and the built-in WYSIWYG editor are described above in the Adding news section. The teaser image of the news can be Edited (✓), Deleted (✗), Updated (✓) or displayed in a separate window using either the actual teaser or name of the image file.

When you have all values entered, click Save to save the news item. You will immediately find it listed among other news items below the news properties form. Alternatively, you can delete the news using the Delete link.

4. If you don't want to make any more changes to the news, you can finally click the Close edit mode link. When you go back to the main page of the News section, the recently edited news will be listed among other news.

Deleting news

If you need to remove a news item from the Intranet Portal and have the appropriate rights, access the
portal and sign in. Navigate to the **News** section using the main menu and in the list of news, click on the title of the news. On the news item page where you will be redirected to, click the **Delete news** link.

Another option to delete a news item is to navigate to the news edit mode by clicking the **Edit news** link and use the **Delete** link as described in the **Editing news** section above.

In both cases, you will be asked to confirm the removal of the news. Please note that if you set the **Destroy document and its history** option to true, it will not be possible to restore the deleted news item. Click **Yes** to remove the news item from the portal.
Part VII

Events
7 Events

7.1 Events overview

The Events section is designed for planning various events.

The section can be accessed from the main menu by clicking the Events button. Events are added by the company employees and other persons who have access to the portal and were assigned special rights. Events are organized chronologically and can be viewed from the main page of the Events section, either by means of the events calendar that takes up the main portion of the page or from the list of upcoming events to the right from the calendar. The calendar displays months and provides the user with a brief and clear overview of all events that were added for the given time period. Each event in the calendar is identified by the date in the given month and its name, which serves as a link towards the details of the event. The Upcoming events section displays the list of the five last added events and you can see here not only the events titles but also the dates when these events are to take place, their summaries and also their locations. If you find the list of five recent events too limited as for its extent, you can view all events added to the portal by clicking the View all events link. Even though the content of the events is primarily aimed at business activities of the company, there are in fact no limitations as to the orientation of the section.

To demonstrate the Events section's features, we will use Luke Hillman, one of the sample users shipped with the portal. Log on using the LukeH username with blank password and select Events in the main navigation. You should see a page similar to the one depicted in the following screenshot.
There are three ways how to deal with events on the Intranet Portal:

- Events can be read by anyone who has access to the portal.
- Each user of the portal can register for events.
- Events can be managed only by users who were assigned appropriate rights.

Apart from these global events, each department and workgroup also has its own dedicated events, accessible only to members of the department or workgroup. These events can be accessed through the main navigation within each department’s or workgroup’s dedicated website section. Please refer to the Departments and Workgroups chapters for more details.

**Reading events**

If you would like to read events on the portal, choose Events from the main menu and you will be redirected to the main page of the Events section. Here you can choose between browsing through the calendar by scrolling through months using the two arrow links in its top left and right corners and between selecting an event from the list of upcoming events or viewing all events on the portal at the same time. Clicking the View all events link will result just in displaying the list of all events on the
To view the details of a particular event, click on its title placed in the colored background. Another way how to view event details is to click on the event title in the calendar. Regardless of where you try to view the event from, its details will be displayed on the main page of the **Events** section, right below the events calendar.
The name of the event is followed by the event summary, which is a concise and clear description of this upcoming event. Event attributes on the Intranet Portal include:

- **Event capacity** - the number of attendees allowed for the event.
- **Event location** - the place where the event is to take place.
- **Event date** - the date when the event is to take place.

The event registration form, the purpose of which is to enable users to register for the particular event, is placed right below the event details, just like the Add event to Outlook link. If you would like to learn more on how to register for events and how to add events to Microsoft Outlook, please refer to the Registering for events topic.

What is more, it is possible to subscribe to events using RSS feeds by clicking on the icon beside the caption of the section. If you would like to learn more about RSS feeds available on the Intranet
Registering for events

Each user signed in to the Intranet Portal can register for events added by company employees and other persons who have access to the portal, regardless of the permissions they were assigned. If you would like to register for an event on the portal, you need to view its details. This can be done either by means of the events calendar or the list of events. In either of the case, you need to click on the name of the event. If you are not certain how to navigate to a particular event, please refer to the Reading events section of the Events overview topic where this procedure is described in detail.

How to register for events

1. If you need to register for an event, click on the event of your interest either in the calendar or in the list of events to display its details together with the registration form.

2. Now fill in the registration form.
Event registration attributes on the Intranet Portal include:

- **First name** - the first name of the attendee.
- **Last name** - the last name of the attendee.
- **E-mail** - the e-mail address of the attendee.

3. Optional: Sometimes it might be useful to add the event you are registering for to your personal agenda so that your own schedule is synchronized with that of the company. The Intranet Portal is well designed for this purpose as it enables you to add the event to Microsoft Outlook using the **Add event to Outlook** link.

4. To confirm the values you have entered in the registration form and to finally register for the event,
click the Register button.

7.3 Managing events

Users who were assigned appropriate rights can not only read events published in this section, they can also add new events and edit and delete the existing ones.

The following examples demonstrate how the actions available to users assigned special rights can be carried out.

Adding events

Here you will learn how to add a new event to the Intranet Portal.

1. If you need to add an event to the Intranet Portal, access the portal and sign in. Now navigate to theEvents section using the main menu and click the Add event link on the main page of the section.

2. This displays the dialog used for the creation of a new event.
Events

August 2011

<table>
<thead>
<tr>
<th>Sun</th>
<th>Mon</th>
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Upcoming events

Strategy Meeting | 10/12/2011

We invite all employees to join us for a review of updated corporate strategy.

Location: Hotel Holiday Inn, 1420 Washington Avenue

Christmas Party | 12/16/2011

Join us for this year’s Christmas Party in the lobby. If you plan to come, please register for this event so that we know how much food needs to be ordered.

Location: Lobby

View all events

New document: Event (booking system)

Event name:

Event summary:

Event details:

Event location:

Start date:

End date:

All day event:

Capacity:

Allow registration over capacity:

Open from:

Open to:

Log on-line marketing activity:

Publish from:

Publish to:
The following fields are available to define the event:

- **Event name** - the name of the event, it is displayed in the calendar and in the list of events; a required field.
- **Event summary** - the summary of the event, it is displayed in the list of events; an optional field.
- **Event details** - the details of the event, they are displayed after clicking on the name of the event; an optional field.
- **Event location** - the location of the event, it is displayed in the list of events; an optional field.
- **Event date** - the date of the event. It is displayed in the calendar and in the list of events; an optional field. You can click the **Now** link to insert the current date and time or you can click the **icon** to choose the date and time from the calendar.
- **Capacity** - the number of attendees allowed for the event; an optional field.
- **Allow registration over capacity** - indicates if the number of registered attendees can be higher than the capacity.
- **Open from** - the date and time when the registration starts. If you leave this value blank, the registration starts when the event is saved; an optional field. You can click the **Now** link to insert the current date and time or you can click the **icon** to choose the date and time from the calendar.
- **Open to** - the date and time when the registration ends; an optional field. You can click the **Now** link to insert the current date and time or you can click the **icon** to choose the date and time from the calendar.
- **Publish from** - the date and time from when the event will be published on the portal. If you leave this value blank, the event will be published right after its saving; an optional field. You can click the **Now** link to insert the current date and time or you can click the **icon** to choose the date and time from the calendar.
- **Publish to** - the date and time until when the event will be published on the portal; an optional field. You can click the **Now** link to insert the current date and time or you can click the **icon** to choose the date and time from the calendar.

You can use the built-in WYSIWYG editor to edit the **Event summary**, **Event details** and **Event location** fields. The WYSIWYG editor is used in various parts of the portal, especially in properties dialogs, and you can learn more about it in Other features -> WYSIWYG editor.

You can optionally click the **Spell check** button; the spell-checker will check the content of the event summary, event details and location and if it finds any mistake, you will be allowed to decide whether to ignore the word, add it to the dictionary or replace it with the suggested word.

When you have all values entered, click **Save** to save the event. You will immediately find the event in the calendar and it will also be available in the section lists.

4. Finally, you can click the **Back to the events calendar** link to return to the main page of the **Events** section.
Editing events

Here you will learn how to edit events on the Intranet Portal.

1. Event entries on the Intranet Portal can have been added by yourself or any other user of the portal assigned special rights. If you need to edit some of them and have the appropriate rights, access the portal and sign in. Now navigate to the Events section using the main menu and click on the name of the event either in the calendar or in the list of events - the details of the event together with the registration form will be displayed below the calendar. Now you can click the Edit link in between the details and the form.
This displays the dialog used for the editing of an existing event.
Events 97

Company Plans 2011

This meeting will be an introduction to our company’s plans for the year 2011. Mr. Luke Hillman will introduce the new annual plans and provide us with extensive explanation of their purpose.

All company employees are invited to attend the event.

Event capacity: N/A
Event location: Meeting Room 1
Event date: 1/4/2011 9:30 AM

Event name: Company Plans 2011

New annual plans of our company will be presented to all employees by Mr. Luke Hillman.

Event summary:

This meeting will be an introduction to our company’s plans for the year 2011. Mr. Luke Hillman will introduce the new annual plans and provide us with extensive explanation of their purpose.

All company employees are invited to attend the event.

Event details:

Meeting Room 1

Event location:

Start date: 1/4/2011 9:30 AM
End date:
All day event:
Capacity:
Allow registration over capacity:
Open from:
Open to:
Log on-line marketing activity:
Publish from:
The fields available for the event, same as the spell check feature and the built-in WYSIWYG editor are described above in the Adding events section.

When you have all values entered, click Save to save the event. You will immediately find the event in the calendar and it will also be available in the section lists. Alternatively, you can delete the event using the Delete link.

4. If you don’t want to make any more changes to the event, you can finally click the Close edit mode link. When you go back to the main page of the Events section, the recently edited event will be found both in the calendar and in the section lists.

Deleting events

If you need to remove an event from the Intranet Portal and have the appropriate rights, access the portal and sign in. Navigate to the Events section using the main menu and click on the name of the event either in the calendar or in the list of events - the details of the event will be displayed below the calendar. Now you need to click the Delete link.
Another option to delete an event is to navigate to the event edit mode by clicking the Edit link and use the Delete link as described in the Editing events section above.

In both cases, you will be asked to confirm the removal of the event. Please note that if you set the Destroy document and its history option to true, it will not be possible to restore the deleted event. Click Yes to remove the event from the portal.
Events

Company Plans 2011

This meeting will be an introduction to our company’s plans for the year 2011. Mr. Luke Hillman will introduce the new annual plans and provide us with extensive explanation of their purpose.

All company employees are invited to attend the event.

Event capacity: N/A
Event location: Meeting Room 1
Event date: 1/4/2011 9:30:00 AM

Delete document "Company Plans 2011"

Are you sure you want to delete the selected document?

- Destroy document and its history (document cannot be restored)

Yes  No

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Part VIII

Media libraries
8 Media libraries

8.1 Media libraries overview

The Media libraries section is designed to provide the user with access to various files, such as photos, sound, videos, package files, presentation files, etc. added to the Intranet Portal.

The section can be accessed from the main menu by clicking the Media button. Although the content of the files is primarily aimed at business activities of the company, there are in fact no limitations as to what areas or interest can be covered in the Media libraries section. You can thus find here company promotion materials of various kinds, same as information on anything the company employees and other persons who can log in to the Intranet Portal may find useful or interesting. However, unlike other sections the Media libraries section is solely presentational. It is therefore not possible for the user of the portal to add, edit or delete any of the files presented in the section. Even though they are allowed to keep copies of the presented files.

To demonstrate the Media libraries section's features, we will use Luke Hillman, one of the sample users shipped with the portal. Log on using the LukeH username with blank password and select Media libraries in the main navigation. You should see a page similar to the one depicted in the following screenshot.

![Media libraries screenshot]

The main portion of the section's main page is taken up by the interface that is used to display teasers of files from the folder selected in the Media library folders area in the left hand side of the page. The Latest media area in the right hand side of the page contains a list of the last added media.

Apart from the global media, each department and workgroup also has its own dedicated media, accessible only to members of the department or workgroup. The media can be accessed through the main navigation within each department's or workgroup's dedicated website section. Please refer to the Departments and Workgroups chapters for more details.
Accessing Media libraries files

If you would like to access the media libraries files, choose Media from the main menu. You will see the content tree of the Media library folders area. Now click either Media, which is the root node of the tree, to view the teasers of all files in the media library folders or click on any folder in the tree to view the teasers of all files in the given folder.

Teasers and some other details such as the size and date of upload of the files contained in the folder you have clicked on are now displayed in the Media area of the main page. By default, teasers are sorted by name. You can change the sorting by clicking on one of the Sort by links.
Teasers displayed in the Media area of the Media libraries section can be sorted by:

- **Name** - the name of the file used on the Intranet Portal.
- **Date** - the date when the file was uploaded on the Intranet Portal.
- **Size** - the size of the file.

If you would like to access the file whose teaser is currently displayed, click either on the teaser or name of the file. Another option how to do it is to click on the title of some of the last added files in the Latest media area in the right hand side of the page. In either of the case, the file together with its details will be displayed.

The details of the file include:

- **Size** - the size of the file.
- **Description** - the description of the file.
- **Uploaded** - the date when the file was uploaded on the Intranet Portal.
- **Type** - the extension of the file denoting the type of the file.

Please note that you can keep a copy of the file by saving it in your local file system. This can be done by clicking the Download link right under the file.
Part IX

Blogs
9 Blogs

9.1 Blogs overview

The Blogs section is designed to publish blogs, which are frequent, chronological publications of one's thoughts and web links.

The section can be accessed from the main menu by clicking the Blogs button. It contains blogs of all portal users and blog posts within these blogs. Anyone who can sign in to the Intranet Portal can view blogs with blog posts, same as create new blogs and blog posts. Each portal user can also leave comments on any blog post they choose. However, an existing blog can be edited and deleted only by its owner who is also the only portal user allowed to add, edit and delete blog posts within this particular blog. Blogs with blog posts and their comments are organized in the form of list where the title and teaser of the given item are displayed. Apart from the title and teaser, listed blogs may be viewed with an optional blog description and blog posts with the information on the blog they belong to, the author, post date and the number of comments. Blogs and blog posts titles work as links that lead directly to the items pages. On these pages you can not only view the actual item, you can also read comments if available and leave comments. What is more, the items owners can manage the items from here, too. Apart from offering the above mentioned functionality, the Blogs section enables you to learn about the top bloggers of the portal, to access the blog post archive or to read the latest blog post comments. Even though the content of the section is primarily aimed at business activities of the company, there are in fact no limitations as to its orientation.

To demonstrate the Blogs section's features, we will use Luke Hillman, one of the sample users shipped with the portal. Log on using the LukeH username with blank password and select Blogs in the main navigation. You should see a page similar to the one depicted in the following screenshot.

The main portion of the section's main page is taken up by the Recent blog posts area that is used to
display the list of recent blog posts. To the right from this list, you can see the Tag cloud, Recent blogs and Latest comments boxes.

Blogs with blog posts on the Intranet Portal can be dealt with in the following ways:

- Blogs and blog posts can be viewed by anyone who has access to the Intranet Portal.
- Anyone who has access to the portal can comment on blog posts.
- Anyone who has access to the portal can create a new blog with blog posts.
- Blogs with blog posts can be edited and deleted only by their owners.

Apart from these global blogs and blog posts with their comments, each department and workgroup also has its own dedicated blogs, accessible only to members of the department or workgroup. They can be accessed through the main navigation within each department’s or workgroup’s dedicated website section. Please refer to the Departments and Workgroups chapters for more details.

Viewing blogs and blog posts

If you would like to view blogs on the portal, choose Blogs from the main menu and on the main page of the Blogs section you will see the Recent blogs box containing a list of recently added blogs by all portal users. Click on the name of any of the listed blogs and you will be redirected to the blog page. To view all blogs by all users published on the portal, click the View all blogs link in the Recent blogs box. Another option to view blogs is to use blog posts. Choose any blog post published within the blog of your interest and click on its title in the blog post details to be redirected to the blog page.

If you would like to view blog posts on the portal, navigate to the main page of the Blogs section and you will see the Recent blog posts area containing a list of recently added blog posts from all blogs on the portal. The simplest way to view a blog post is to choose one from this list. Just click on the name of the blog post of your interest that serves as a link and you will be redirected to the blog post page. Another way to view a blog post is to use the tag cloud, which displays tags that are associated with the current blog post. Tags can be found in the Tag cloud box displayed as links. Those with higher occurrence are displayed in higher font size. If the portal user clicks on some of the links, a list of all blog posts tagged with the given tag will be displayed. If you would like to view a blog post via a blog, just go to the given blog page and click on the title of the blog post of your interest. Finally, it is possible to subscribe to blog posts using RSS feeds by clicking on the icon beside the caption of the Recent blog posts area. If you would like to learn more about RSS feeds available on the Intranet Portal, please refer to Other features -> RSS feeds.
9.2 Commenting on blog posts

Each user signed in to the Intranet Portal can comment on blog posts published by other users. Besides, each user can also report defective and illicit content by clicking the Report abuse link next to the blog post comment.

The following example demonstrates how a user of the Intranet Portal can perform this action. We will use Luke Hillman, one of the sample users shipped with the portal. Log on using the LukeH username with blank password and select Blogs in the main navigation.

How to comment on blog posts

1. If you would like to comment on a blog post on the Intranet Portal, you first need to view the details of this particular blog post. On the main page of the Blogs section, you can see the Recent blog posts area containing a list of recently added blog posts. The simplest way to view the details of a blog post is to choose one from this list. For more details on how to view blog posts on the portal, please refer to Blogs overview -> Viewing blogs and blog posts.

2. After you have clicked on the title of the blog post that you would like to comment on, you will be redirected to the blog post page. The details of the blog post together with its comments and the Leave comment form will be displayed here.
3. Scroll down to the bottom of the page as far as the form. To leave a comment on a particular blog post, you need to fill in the form by entering your name and the actual comment. Your e-mail and URL are optional values that needn't be entered. Please note that the **Name** and **E-mail** fields are filled in automatically according to the current user's account.

Blog post comment attributes on the Intranet Portal include:

- **Name** - the name of the author of the comment; a required field.
- **E-mail** - the e-mail of the author of the comment; an optional field.
- **Your URL** - URL of the author of the comment; an optional field.
- **Comments** - the text of the comment you would like to leave; a required field.

3. To confirm the values you have entered in the previous step and to finally add the comment, click **Add**.
. The new comment will be displayed on top of the list of comments, just below the blog post.

**Please note**

Apart from reporting abuse using the **Report abuse** link, the blog owner can manage blog post comments, i.e. **Edit**, **Delete** and **Reject** them using the respective links.

---

9.3 **Creating a new blog**

Each user signed in to the Intranet Portal can **create a new blog** and **add posts** to this blog. It means that the user must be the owner of the blog to be able to add blog posts.

The following example demonstrates how a user of the portal can perform these actions. We will use Luke Hillman, one of the sample users shipped with the portal. Log on using the **LukeH** username with **blank password**.

**How to create a new blog**

1. If you would like to create a new blog on the Intranet Portal, access the portal and sign in. Now navigate to the **Blogs** section using the main menu and click the **Create a new blog** link on the main page of the section.
2. This displays the dialog used for the creation of a new blog.

The following fields are available to define the blog:

- **Blog name** - the name of the blog displayed on the portal; a required field.
- **Blog description** - the description of the blog displayed on the portal; an optional field.

When you have all values entered, click OK to save the new blog. You will immediately be redirected to the blog page. Please note that if you now went to the main page of the Blogs section, the newly created blog would be listed among other blogs in the Recent blogs box.
How to add a blog post to a blog

1. If you would like to add a new blog post to the Intranet Portal, you must be the owner of at least one blog. Access the portal, sign in and navigate to the Blogs section using the main menu. Now select one of your blogs where you would like to add a blog post. Click on the name of the blog and on the blog page, where you will be redirected to, click the New blog post link.

2. This displays the dialog used for the creation of a new blog post.
The following fields are available to define the blog post:
- **Post title** - the title of the blog post displayed on the portal; a required field.
- **Post date** - the date and time of creation of the blog post, displayed in the details of the blog post; a required field. You can click the **Now** link to insert the current date and time or you can click the icon to choose the date and time from the calendar.
- **Post summary** - the summary of the blog post displayed in the list of blog posts; a required field.
- **Post text** - the text of the blog post displayed on the blog post page; a required field.
- **Post teaser** - blog post teaser (preview) image displayed in the list of blog posts; an optional field. Click the **Upload file** link to upload the image from the local or network file system.
- **Allow comments** - indicates if commenting on the blog post is allowed; an optional field.
- **Tags** - special words that are associated with the blog post, displayed in the form of links; an optional field.
- **Publish from** - the date and time when the blog post will be published on the portal; an optional field. If you leave this value blank, the blog post will be published right after its saving. You can click the **Now** link to insert the current date and time or you can click the icon to choose the date and time from the calendar.
- **Publish to** - the date and time until when the blog post will be published on the portal; an optional field. You can click the **Now** link to insert the current date and time or you can click the icon to choose the date and time from the calendar.

You can use the built-in WYSIWYG editor to edit the **Post summary** and **Post text** fields. The WYSIWYG editor is used in various parts of the portal and you can learn more about it in Other features -> WYSIWYG editor.

You can optionally click the **Spell check** button; the spell-checker will check the content of the post summary and post text and if it finds any mistake, you will be allowed to decide whether to ignore the word, add it to the dictionary or replace it with the suggested word.

When you have all values entered, click **Save** to save the new blog post. You will immediately find it listed among other blog posts below the blog post properties form.

5. Finally, you can display the newly created blog post on the blog page by clicking the **My blog posts** link.

---

9.4 Managing blogs

Users who created their own blogs on the Intranet Portal can edit and delete these blogs, same as edit and delete blog posts added to these blogs.

The following examples demonstrate how the actions available to blog owners can be carried out. For the purpose of the examples we will use Luke Hillman, one of the sample users shipped with the portal. Log
on using the \textit{LukeH} username with blank password.

**Editing blogs**

1. If you need to edit one of the blogs you created, access the portal and sign in. Now navigate to the Blogs section using the main menu and click on the name of the blog. On the page where you will be redirected to, click the \textbf{Edit blog} link. For more details on how to view blogs on the portal, please refer to \textbf{Blogs overview -> Viewing blogs and blog posts}.

2. This displays the dialog used for the editing of an existing blog.
The following fields are available if you edit an existing blog:

- **Blog name** - the name of the blog displayed on the portal; a required field.
- **Blog description** - the description of the blog displayed on the portal; an optional field.
- **Side column text** - the blog side column text; an optional field.
- **Blog Teaser** - the teaser (preview) image of the blog. It is displayed together with the name of the
blog; an optional field. Click the "Upload file" link to upload the image from the local or network file system.

- **Open comments for** - indicates how long blog comments are opened after publishing a blog post; the default value is *Always*.
- **Send comments to e-mail address** - the e-mail address to which comments will be sent; an optional field.
- **Allow anonymous comments** - indicates if anonymous users are allowed to insert comments; an optional field.
- **Use CAPTCHA for comments** - indicates if CAPTCHA is used for comments; an optional field.
- **Require e-mail address** - indicates if e-mail address is required when adding a blog comment; an optional field.
- **Unsubscription URL** - URL of a page with the Blog post unsubscription web part, which handles blog post unsubscription requests from links contained in blog post notifications; an optional field. Unless you were instructed otherwise, please leave the field empty - a pre-defined page will be used.
- **Enable subscriptions** - indicates if subscriptions to notifications about new blog post comments are enabled; an optional field.
- **Moderate comments** - indicates if new comments require to be moderated before publishing; an optional field. If the blog is moderated, all new blog post comments are created in the rejected state and must be approved by a blog moderator or the blog owner before becoming visible. Moderators receive automatic notification e-mails whenever a new blog post comment that requires their approval is created. Please note that blog moderators have the same rights to blog post comments like the blog owner.
- **Blog moderators** - users who are allowed to moderate blog post comments; an optional field. Use the Select button to select the moderators or use the Clear button to remove the moderators from the blog.
- **Enable trackbacks** - indicates if the trackbacking feature is enabled; an optional field.
- **Publish from** - the date and time when the blog will be published on the portal; an optional field. If you leave this value blank, the blog will be published right after its saving. You can click the Now link to insert the current date and time or you can click the icon to choose the date and time from the calendar.
- **Publish to** - the date and time until when the blog will be published on the portal; an optional field. You can click the Now link to insert the current date and time or you can click the icon to choose the date and time from the calendar.

You can use the built-in WYSIWYG editor to edit the **Blog description** and **Side column text** fields. The WYSIWYG editor is used in various parts of the portal and you can learn more about it in **Other features -> WYSIWYG editor**. The teaser image of the blog can be **Edited**, **Deleted**, **Updated** or displayed in a separate window using either the actual teaser or name of the image file. You can also optionally click the **Spell check** button; the spell-checker will check the content of the blog description and the side column text and if it finds any mistake, you will be allowed to decide whether to ignore the word, add it to the dictionary or replace it with the suggested word.

When you have all values entered, click **Save** to save the blog. Alternatively, you can delete the blog using the **Delete** link.

4. If you don't want to make any more changes to the blog, you can finally click the **Close edit mode** link. You will immediately be redirected to the blog page. If you now go to the main page of the **Blogs** section, the blog will be listed among other blogs in the **Recent blogs** box.
Editing blog posts

1. If you need to edit some of the blog posts you added to a blog whose owner you are, access the portal and sign in. Now navigate to the Blogs section using the main menu and click on the name of the blog post. On the page where you will be redirected to, click the Edit link. For more details on how to view blog posts on the portal, please refer to Blogs overview -> Viewing blogs and blog posts.

2. This displays the dialog used for the editing of an existing blog post.
The following fields are available if you edit an existing blog post:
Post title - the title of the blog post displayed on the portal; a required field.

Post date - the date and time of creation of the blog post, displayed in the details of the blog post; a required field. You can click the Now link to insert the current date and time or you can click the icon to choose the date and time from the calendar.

Post summary - the summary of the blog post displayed in the list of blog posts; a required field.

Post text - the text of the blog post displayed on the blog post page; a required field.

Post teaser - blog post teaser (preview) image displayed in the list of blog posts; an optional field. Click the Upload file link to upload the image from the local or network file system.

Allow comments - indicates if commenting on the blog post is allowed; an optional field.

Tags - special words that are associated with the blog post, displayed in the form of links; an optional field.

Publish from - the date and time when the blog post will be published on the portal; an optional field. If you leave this value blank, the blog post will be published right after its saving. You can click the Now link to insert the current date and time or you can click the icon to choose the date and time from the calendar.

Publish to - the date and time until when the blog post will be published on the portal; an optional field. You can click the Now link to insert the current date and time or you can click the icon to choose the date and time from the calendar.

When you have all values entered, click Save to save the blog post. You will immediately find it listed among other blog posts below the blog post properties form. Alternatively, you can delete the blog post using the Delete link.

4. If you don't want to make any more changes to the blog post, you can finally click the Close edit mode link. When you go back to the main page of the Blogs section, the recently edited blog post will be listed among other blog posts in the Recent blog posts area.

Deleting blogs

If you need to remove one of the blogs you created on the Intranet Portal, access the portal and sign in. Navigate to the Blogs section using the main menu and click on the name of the blog. On the blog page where you will be redirected to, click the Delete link. Please note that deleting the blog will result in removing all blog posts added to this blog, too. For more details on how to view blogs on the portal, please refer to Blogs overview -> Viewing blogs and blog posts.
Another option to delete a blog is to navigate to the blog edit mode by clicking the **Edit blog** link and use the **Delete** link as described in the **Editing blogs** section above.

In both cases, you will be asked to confirm the removal of the blog. Please note that if you set the **Destroy document and its history** option to true, it will not be possible to restore the deleted blog. **Click Yes** to remove the blog from the portal.
Deleting individual blog posts

If you need to remove one particular blog post whose owner you are, access the portal and sign in. Navigate to the Blogs section using the main menu and click on the name of the blog post. On the blog post page where you will be redirected to, click the Delete link. For more details on how to view blog posts on the portal, please refer to Blogs overview -> Viewing blogs and blog posts.

Another option to delete a blog post is to navigate to the blog post edit mode by clicking the Edit link and use the Delete link as described in the Editing blog posts section above.
In both cases, you will be asked to confirm the removal of the blog post. Please note that if you set the **Destroy document and its history** option to true, it will not be possible to restore the deleted blog post. Click **Yes** to remove the blog post from the portal.
Forums
10 Forums

10.1 Forums overview

The Forums section provides a place where all users can participate in discussions based on posted messages.

Forums are organized in a tree-like structure, starting from a forum group, which contains individual forums. Each forum is usually dedicated to a certain topic. Forums and their groups cannot be created by regular users and must be predefined by the portal administrators. The next level are threads, which can be created under forums and represent a single discussion. These threads are composed of posts, every post being a contribution to the discussion by a user. The posts are organized in a way where every post is a reply to either the original post of the thread or to another subsequent post.

The main portion of the page is taken up by the interface that is used to browse or post in the forums. On the right are lists providing information and links related to forum activity. It is also possible to access an RSS feed containing forum posts using the icon in the Latest posts box. Please refer to Other features -> RSS feeds to learn more about using RSS feeds on the portal.

In addition to this global forum, each department and workgroup also has its own dedicated forum, accessible only to members of the department or workgroup. Please refer to the Departments and Workgroups chapters for more details.

There are two modes forums can be viewed in:

- Most users can only view the contents of the forums and add their own contributions, please refer to the Using forums topic for more detailed information.
- Some users may be designated as forum moderators and tasked with overseeing a certain forum. Moderators have some additional options available to them; please see the Moderating forums topic to learn more.
10.2 Using forums

The examples in this topic demonstrate how common forum activities can be performed. Please be aware that some of these actions may not be available. The portal administrators decide which of them are enabled.

Browsing

1. Access the portal and sign in. Now navigate to the Forums section using the main menu and select one of the forums from a forum group. Alternatively, you can click on a link from the lists on the right if any of the displayed posts interest you, which will take you directly to the relevant discussion.

2. When a forum is chosen, all the threads contained in it will be shown.

3. Select an individual thread and all posts in the discussion and the users who added them will be displayed.
The View modes drop-down list on the top right can be used to change the way posts are displayed. **Threaded** mode shows posts in a hierarchy, with each reply being on a lower level than the post that is being replied to, while **Flat** modes simply display posts in the chosen chronological order.
4. At any time, you can see your location in the forums and link to a previous level using the breadcrumbs navigation tool shown at the top of the forum interface.

5. If you spot a post that you believe to be offensive or inappropriate while browsing, you can bring it to the attention of the portal administrators by clicking the **Report abuse** link on the bottom right of the post. A window will appear where you can describe the reason for the report and send it by using the **Report abuse** button.

**Posting**

1. The most basic way to make your own contribution to a forum is to start a new discussion by creating a new thread under a selected forum by using the **New thread** link.
2. This displays the dialog used for the creation of new posts.

The following fields are available to define the thread and the content of its first post:

- **Nick name** - the user name of the thread author.
- **E-mail** - the e-mail address of the thread author. By default, the address of the current user is entered here.
- **Subject** - the text that is used as the subject in the list of threads as well as for the initial post.
- **Post** - the text content of the initial post.
- **Subscribe to post** - if checked, the author of the post will be subscribed to the new thread. Subscription is described in the next section.
- **Attach file(s)** - if checked, the dialog used to add attachments will be opened once the OK button is clicked. This dialog is described later.

The buttons above the Post editing section can be used to add content to the post and format its text. The following are available:

- **Insert link** - inserts a link into the post. The URL and description must be specified.
• **Insert image** - inserts an image into the post. The URL of the image must be specified.
• **Insert quote** - places the selected text into a gray box that is used for quotations.
• **Insert code** - places the selected text into a yellow box and sets a monospaced font.
• **Bold** - sets the selected text to be bold.
• **Italics** - sets the selected text to be in italics.
• **Underline** - sets the selected text to be underlined.
• **Strikethrough** - sets the selected text to use strikethrough.
• **Font color** - sets the color of the selected text. The code of the used color must be specified.

You can use the **Preview** button to see how the post will appear on the forum. Click the **OK** button to create the new thread under the selected forum. Some forums may be moderated and it will be necessary for a moderator to approve the new post before it becomes visible.

3. If the **Attach file(s)** setting was checked, the attachments dialog appears after **OK** is clicked.

![General forum](image)

Use the **Browse** button to select files to be attached to the post from the local file system. Confirm the selection by using the **Upload** button. If you no longer wish to have a file as an attachment, it can be removed by using the **Delete** link next to it. You can return to the forum by clicking **Back** and you will notice that any attached files are displayed below the content of the post.

4. Posts can also be added to an existing thread, by selecting it and clicking the **Reply** link underneath one of the posts in the thread.

![Member](image)

This open the same post creation dialog as when creating a new thread, except that the post is simply added to the existing thread. The **Quote** link has the same effect, but it additionally adds the content of the post that was replied to as a quote to the beginning of the new post.

5. It is possible to modify your own posts using the links on the right.
The **Edit** link opens a dialog identical to the one used when creating a new post, but the current content of the post is already pre-filled into the respective fields. **Delete** removes the given post. If you delete the initial post of a thread, then the entire thread will be removed. The **Attachments** link opens the same attachments dialog that is described above.

### Subscription

Subscription allows you to closely follow a forum or its section by sending you an automatic notification e-mail using the following format whenever a new post is added.

This is a notification of a new post added to the forum you subscribed to:

- **Forum:** General
- **Subject:** New post
- **Posted by:** Full6
- **Date and time:** 11/15/2010 11:24:30 AM
- **Text:**

  This is a new post.

[Click here to view forum on-line] [Click here to unsubscribe]

1. To subscribe to an entire forum, select it and click the **Subscribe to forum** link.

When subscribing, a dialog is displayed where you can enter the address that the notification e-mails should be sent to. By default, the address specified in your employee profile is filled in, but you can enter a different address.

2. You can also subscribe to individual posts in threads by using the **Subscribe to post** link. This option sends notification e-mails when a sub-post is added as a reply. As mentioned above, it is also possible to subscribe to a new post when you are creating it.
3. It is possible to unsubscribe using a link provided in any of the notification e-mails.

**Forum favorites**

You can add a forum or individual post to your list of favorites, from which it can quickly be accessed.

1. To add an entire forum to your favorites, select it and click the **Add forum to favorites** link.

2. You can also add individual posts in threads by using the **Add post to favorites** link.
3. Your list of favorites can be found by going to your employee profile, using the Edit my profile link in the Shortcuts menu on the right and scrolling down. Your forum favorites are at the bottom right of the page.

You can link to the listed forum or post simply by clicking on its title. The Delete (x) button removes favorites from the list.

**Searching forums**

The forums are included when the entire portal is searched, so all that needs to be done to look for a topic in the forums is enter a relevant expression into the search bar on the right, just below the main navigation menu.

Please keep in mind that the search results may contain entries from the regular content of the portal as well as the forums. When browsing a department or workgroup, only content of the particular department or workgroup will be included in the search. Outside these dedicated sections, all global content (everything except for the content belonging to departments and workgroups) will be searched.

### 10.3 Moderating forums

Forum moderators are users that are given special rights within the scope of one or more forums. They help organize the forum and ensure that the discussions follow certain rules or guidelines. Some forums are configured to be moderated, which means that all new posts must be approved by a moderator before they become visible, but even forums without this restriction can be managed.

The following examples demonstrate how the actions available to moderators can be carried out.

**Managing threads**

1. Access the portal and sign in as Brad Summers (user name BradS with a blank password). This sample user can moderate all of the forums on the portal. Now navigate to the Forums section using the main menu and select a forum.

2. You will notice that there is a yellow box shown below the title of every thread. Click the Lock link in this box.
Doing so prevents new posts from being added to the thread. Use the **Unlock** link that is now displayed in the yellow box to reverse this state.

3. The order in which threads are displayed is determined by the date and time of their last post, with the most recently updated threads being at the top. A thread can be marked as **sticky** using the **Stick thread** link, which causes it to override the usual order and always be placed above non-sticky threads. This is usually done for threads containing frequently needed information or forum announcements. If there are multiple sticky threads in a forum, their order can be changed using the **Move down** and **Move up** links.

The sticky flag can be removed from a thread using the **Unstick thread** link.

### Managing posts

1. Select a thread and open it to view the posts that it contains. As you can see, all posts in the thread can be edited or deleted the same way a user would edit their own posts (this is described in the [Using forums](#) topic).

2. Posts are categorized into two groups, rejected posts and approved posts. Approved posts can be seen normally by all users with access to the forum, while rejected posts are only visible by forum moderators (marked by a yellow background).
In forums set to be moderated, all new posts are rejected by default and notification e-mails are automatically sent to the moderators of the forum informing them about posts waiting for approval. You can change the status of a post using the Reject or Approve links displayed above it. The Reject all and Approve all links affect all the posts in the thread. Please be aware that if the initial post of a thread is rejected, the thread will not be visible to regular forum users.

3. When browsing a forum, the amount of unapproved posts contained in a thread can be seen in the yellow box below its title.

Moving posts

1. Select a thread. If you wish to relocate the entire thread to a different forum, click the Move thread link shown above the initial post in the thread.
A drop-down list will appear above, where you can select any forum on the portal to which the thread should be moved. Confirm your selection using the Move link on the right of the list.

2. Other posts in the thread can be separated by clicking the Split thread link.

This causes the given post and all its replies to be removed from the thread and placed into a new thread under the same forum.
Part XI

Employees
11 Employees

11.1 Employees overview

The Intranet Portal uses a system of profiles to represent individual users. Every authenticated user can view the profiles of others to find information about them, or access their own profile to alter the data that it contains.

The Employees section, which can be accessed through the main navigation menu, contains a list of all users that are registered on the portal, typically company employees. For every user, the list displays their position within the company and various types of contact information.

The Search employee by name filter above the list can be used to find users by their name. Additionally, one of the company’s departments may be selected from the Department drop-down list, causing only those users who are members of the given department to be shown.

Right-clicking a user's name or image opens a context menu that offers several possible actions:

- Send message - allows a personal message to be sent to the given user. Please see the Managing my user profile topic for details on messaging.
- Add to ignore list - adds the given user to the current user's messaging ignore list.
- Add to contact list - adds the given user to the current user's messaging contact list.
Left-clicking a user opens their employee profile.

**Employee profile**

When viewing an employee's profile, the area at the top contains a photo of the employee, contact and personal information and statistics measuring the activity of the given user on forums, message boards and blogs.

**Employee profile - Ben Ramsey**

<table>
<thead>
<tr>
<th>Position</th>
<th>PR Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>User name</td>
<td>BenR</td>
</tr>
<tr>
<td>E-mail</td>
<td><a href="mailto:ben@localhost.local">ben@localhost.local</a></td>
</tr>
<tr>
<td>Phone number</td>
<td>187</td>
</tr>
<tr>
<td>Skype account</td>
<td>company_benr</td>
</tr>
<tr>
<td>Instant messenger</td>
<td>WLM_Ben_Ramsey</td>
</tr>
<tr>
<td>Gender</td>
<td>N/A</td>
</tr>
<tr>
<td>Date of birth</td>
<td>N/A</td>
</tr>
<tr>
<td>Created</td>
<td>11/23/2010</td>
</tr>
</tbody>
</table>

**My announcements**

There are currently no announcements.

**Comments on me**

There are currently no comments.

Below are two message boards that can be used to post text messages onto the profile of the given user. The **My announcements** board may only be used by the user whose profile is being viewed. The **Comments on me** board is accessible by all authenticated portal users. Users have permissions to moderate the boards on their own profile. For detailed information on using message boards, please refer to the **Other features -> Using message boards** topic.

An important section of the employee profile is the **Shortcuts** menu on the top right, which offers a list of convenient links that allow users to easily navigate between various parts of their own profile, as well as perform actions related to the user whose profile is being viewed.
The following links are available in the list:

- **My profile** - links to the profile of the current user.
- **Edit my profile** - links to the *editing page* of the current user's employee profile.
- **My messages** - links to the *messages page* of the current user's employee profile.
- **My invitations** - links to the *invitations page* of the current user's employee profile.
- **My tasks** - links to the part of the current user's employee profile that contains a list of assigned tasks and related projects. Please refer to the *Project management overview* topic for more information.
- **Create a new workgroup** - allows a new *workgroup* to be created. This process is described in the *Creating a new workgroup* topic.

When viewing the profiles of other users (i.e. not when the current user's profile is displayed), the following links are additionally available:

- **Invite to workgroup** - opens a window that allows the user whose profile is being viewed to be invited to join one of the current user's workgroups. It is only available if the current user is a member of at least one workgroup.

- **Send message** - sends a personal message to the user whose profile is being viewed. Please see the *Managing my user profile* topic for details on messaging.
• **Add to contact list** - adds the user whose profile is being viewed to the current user's messaging contact list.
• **Add to ignore list** - adds the user whose profile is being viewed to the current user's messaging ignore list.

The area below the **Shortcuts** menu is taken up by boxes displaying the workgroups and departments that the selected user is a member of, and any blogs that they might have. The displayed items also serve as links to the part of the portal that contains them.

### 11.2 Managing my user profile

This topic describes how a portal user can edit their own profile and the tools that are available on it.

To demonstrate, log on as Brad Summers (user name *BradS* with a blank password), one of the sample portal users. To access the current user's profile, click the name of the current user (*Brad Summers*) located on the main header.

This opens the public employee profile that is described in the Employees overview topic.
You can click the links in the **Shortcuts** menu on the right side of the page to access the following profile sections:

- [Edit my profile](#)
- [My messages](#)
- [My invitations](#)
- [My tasks](#)

The menu is present on all sections of the profile and can be used to navigate between them.

**Edit my profile**

This section contains a dialog that allows you to change the information displayed on your public profile and configure other general settings of your user account. The dialog is divided into two tabs.

On the **Personal settings** tab, you can edit the following data fields:

- **User name** - displays the unique name that identifies the user and is used to log on. This field cannot be edited.
- **Full name** - the full name of the user.
- **Email** - the e-mail address of the user.
- **Display my e-mail to** - can be used to set what type of users can see the e-mail address of the user on the public profile.
- **Nickname** - nick name of the user shown on forums, on the user's profile, etc.
- **Signature** - text that will automatically be added as a signature to the end of messages that are sent by the user.
- **Messaging notification e-mail** - the e-mail address to which notifications about new received messages will be sent.
- **Time zone** - can be used to select a time zone to reflect the geographical location of the user. If set, this time zone will be used instead of the time zone set for the portal to convert displayed time.
- **Avatar** - allows an image to be uploaded from the local file system to serve as the graphical representation of the user. A photo of the employee is typically used.
- **Gender** - the user's gender.
- **Date of birth** - the user's date of birth. The *Choose date* button may be used to select a specific date from a calendar.
- **Skype account** - the name of the user's Skype account
- **Instant messenger** - the name of the user's instant messenger account. The value of the field does not have to follow any format and can be filled in with any string of characters as required, e.g. *WLM: Brad_Summers*
- **Phone number** - the user's phone number or extension. The number may be entered in any format, no validation is applied.
The **Change password** tab allows you to specify a new password used to log on to the portal with this user account. The current password must first be entered into the **Your existing password** field, and the new password must be typed into both the **New password** and **Confirm password** fields. The portal may be configured to use a password policy. In this case, the new password will have to fulfill certain requirements, such as character length. The relative strength of the entered password will be calculated and displayed by the indicator below the **New password** field.

The process can be finished by clicking the **Set password** button. Please be aware that this tab is not available if the portal is configured to use Windows authentication.
My Messages

This section allows you to work with the internal messaging system, which provides a way to communicate with other users via personal text messages. The following tabs are available:

Inbox

This tab is where you can see a list of all received messages. If there is an address specified in the Messaging notification e-mail field of your user profile, a notification will be sent to this address whenever you receive a new message. New unread messages in the inbox are marked bold for emphasis.

Messages

The following actions are available for each message:

- **Reply** - prepares a message reply to be sent back to the author of the selected message. The options available when sending a message are described below.
- **Delete** - deletes the particular message. The Delete all messages link above the message list removes all messages.

The full contents of a message can be viewed simply by clicking on it in the list.
The Reply and Delete message links shown above the message function exactly like the corresponding actions from the message list. The Forward link prepares a new message containing the text of the selected message. The Add to contact list and Add to ignore list action buttons can be used to add the author of the message to the respective list. More information can be found below in the section dedicated to the appropriate tabs.

A new message can be created either using the New message link above the inbox message list, or by forwarding or replying to a received message. In all of these cases, an interface similar to the following is used.

When creating a message, you first need to select its recipient by clicking the Select button next to the To field. This opens a window where the message recipient can be selected either from your Contact list or by searching among all users on the portal.
Then, the Subject field and the actual text of the message need to be filled in. The buttons above the message editing area can be used to add content to the message and format its text. The following are available:

- **Insert link** - inserts a link into the post. The URL and description must be specified.
- **Insert image** - inserts an image into the post. The URL of the image must be specified.
- **Insert quote** - places the selected text into a gray box that is used for quotations.
- **Insert code** - places the selected text into a yellow box and sets a monospaced font.
- **Bold** - sets the selected text to be bold.
- **Italics** - sets the selected text to be in italics.
- **Underline** - sets the selected text to be underlined.
- **Strikethrough** - sets the selected text to use strikethrough.
- **Font color** - sets the color of the selected text. The code of the used color must be specified.

When complete, the message can be sent out using the Send button.

**Outbox**

This tab lists all outgoing messages. The same actions are available as on the Inbox tab, except for replying to messages for obvious reasons.

**Contact / Ignore list**
The list on the **Contact list** tab contains users that are easily selected as a message recipient when creating a new message. These are typically users that you communicate with often.

If a user is added on the **Ignore list** tab, any messages from them will not be delivered.

The interface for managing both lists is the same. Clicking the **Add users** button opens a window where you can select users to be added to the list. The **Remove selected** button removes the users marked by the check boxes on the left.

**My invitations**

This section allows you to manage **workgroup** invitations. The **Received invitations** list shows all invitations sent to you by other users and allows you to **Accept** (✓) or **Delete** (✗) them.

The **Sent invitations** list contains all pending invitations sent out by you that have not yet been accepted or rejected. The **Resend** (✉) action can be used to send a new notification e-mail informing the invited user about the invitation, while **Delete** (✗) cancels the invitation entirely.

**Invitations**

<table>
<thead>
<tr>
<th>Actions</th>
<th>Group</th>
<th>Invited by</th>
<th>When</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>✗ ✓</td>
<td>Marketing</td>
<td>BenR</td>
<td>12/1/2010 5:17:23 PM</td>
<td>This is a workgroup invitation.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Actions</th>
<th>Group</th>
<th>Invited</th>
<th>When</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>✗ 🚫</td>
<td>Microsoft</td>
<td>SeanG</td>
<td>12/1/2010 5:22:03 PM</td>
<td>Hi, please join the workgroup and help us out.</td>
</tr>
</tbody>
</table>

**My Projects and tasks**

This section of the user profile is described in the [Project management overview](#) topic.

### 11.3 Using My Dashboard

There is a special page on the Intranet Portal called **My Dashboard**, which can be personalized directly on the website by every registered user. Each user can specify the content that should be displayed on their version of the page, depending on what they wish to see or use. The following example will
demonstrate how this page can be accessed and what kind of modifications are possible:

1. Access the portal, log on as Ruth Baker (user name *RuthB* with a blank password) and click the **My Dashboard** link located on the main header. This link is accessible from any location on the portal.

2. The **My Dashboard** page will now be opened. Notice that the page is composed of separate elements that display some kind of content or allow certain actions to be performed. Each element is enclosed in a container with a header that has some action buttons on the right and a title on the left, such as for example **My inbox**.

These elements are called *widgets* and they can be used as building blocks to form the required page design.

3. Hover your mouse cursor over any of the widgets and you will notice that a black outline appears around a section of the page. This outline designates a *widget zone*, which is a region on the page that may contain widgets.
By default, all of the widgets are placed in the first zone, but there are several other available zones below at the bottom of the page to which widgets can be moved. This is described later in this topic.

4. To manage the widgets on the page, the appropriate actions must be used. The simplest action available for widgets is minimization, which hides the content of the widget so that only its header is visible. Click the Minimize widget action button in the top right corner of the My inbox widget. The result should look like in the following image.

![Minimize widget](image)

Use the Maximize widget action to restore the widget to its previous state.

5. Now click the Remove widget action button of the My inbox widget to delete it completely. Click OK in the confirmation dialog and the widget will disappear from the page.

6. To add a new widget to a zone, hover over it and click the Add widget button in its top left corner. This opens the Select widget catalog, where you can choose from available widgets.
More information about the widgets that are available on the portal by default can be found in the Intranet widgets chapter of this guide.

Click the Content category in the tree on the left of the catalog, select the Latest news widget and click OK. The Widget properties dialog will be opened, where you can configure the properties of the new widget.

![Widget properties dialog](image)

The Widget title property may be used to specify the text that will be displayed in the header of the widget on the page. Set the value of the Number of news property, which determines the maximum amount of displayed news items, to 1. This will cause the widget to show only the most recent news from the portal. Confirm the configuration by clicking OK. The widget will now be added to the bottom of the zone.

An alternative way of adding a new widget is by using the Add widget link at the top left of the My Dashboard page.
7. Now click the **Configure widget** button of the newly created **Latest news** widget, which opens the same **Widget properties** dialog that was shown when the widget was being created. This action can be used if you ever wish to change the properties of an existing widget. Every widget has its own set of properties depending on its function.

8. The location of widgets can easily be changed by using their drag-and-drop functionality. This works both for modifying the order of widgets in a zone and moving a widget to a different zone. Hover over the header of the **Latest news** widget and the mouse cursor will change. Hold down the mouse button and try to drag the widget to the top of the zone. When dragging a widget around the page, you will notice that possible locations are highlighted by a red dotted outline.

9. The resulting page should be similar to the following image.

If required, the entire page can be returned to its default state simply by clicking the **Reset to default** link.

Please keep in mind that any changes made to the page are unique for every user. If you log on to the portal as a different user, the **My Dashboard** page will either be in its default state, or it will reflect any modifications done by that particular user.
Part XII

Project management
12 Project management

12.1 Project management overview

Project management is a tool that helps organize work and keep track of its progress. This is achieved by using objects called **projects** that represent a planned activity with a specific goal, such as creating a product, service or achieving some other result. The work required to complete a project is divided into smaller segments called **tasks** that are individually assigned to specific users. Every project and task has a set of properties that are used to define its goal, time frame, progress and other characteristics. Throughout the work process, a project or task can be modified to reflect its changing status. All this provides a system that allows projects to be monitored and managed from the moment they are created until their completion.

Tasks do not necessarily have to be part of a project and are sometimes simply used to give a user a single assignment that can easily be tracked on the Intranet Portal. These are referred to as **personal tasks**.

To ensure that users are aware of task assignments or any changes in tasks related to them, project management uses a system of notification e-mails that are automatically sent when required.

There is no section dedicated to projects on the main portal. Every project is associated with either a **Department** or **Workgroup** and can be managed on the **Projects** section of the appropriate sub-portal under which it belongs. Please refer to the Creating a new project topic to learn about the specifics of using projects.

However, every authenticated user can access an overview of all projects and tasks related to them from anywhere on the portal via a link located on the right side of the main header. This link also displays the amount of active tasks that are assigned to the current user. To demonstrate, please sign in as Brad Summers (user name **BradS** with a blank password), one of the sample users with access to the project examples on the portal.

Using the link opens the **My Projects and tasks** part of the current user's employee profile, which is divided into three sections:

- **My Projects** - contains a list of all projects that the current user is allowed to access. The names of the displayed projects also serve as links to the department or workgroup section where the given project can be edited.
- **Tasks assigned to me** - contains a list of all unfinished tasks that are assigned to the current user.
- **Tasks owned by me** - contains a list of all unfinished tasks that are owned by the current user. A task is usually owned by the user who created it.
My Projects and tasks

Tasks displayed on this page can be edited by clicking on their title or Deleted (✗). New tasks that will not belong under any project can be created using the New personal task links. The details of creating and editing tasks are described in the Managing tasks topic. Please be aware that some of these actions may not be allowed for every user depending on the security configuration of projects.

12.2 Creating a new project

The example in this topic demonstrates how projects can be created and configured under a department. The procedure for doing the same under a workgroup is nearly identical and any differences will be mentioned. Please be aware that this example is from the point of view of a user with full project management permissions and all of the described actions may not be available for other users.

1. Access the portal and sign in as Brad Summers (user name BradS with a blank password). Navigate to the Departments section and click on the IT department, which will bring you to its sub-section of the portal.

2. Select the Projects section of the department from the menu. It contains a list of all projects that belong to the department and key information about them. The action buttons to the left of each project can be used to Edit (✓) or Delete (✗) it.
3. A dialog will appear where you can define the following properties of the new project:

- **Display name** - name of the project.
- **Project goal** - text description of the purpose of the project.
- **Start date** - specifies the date and time when work on the project should start. Clicking the *Now* link enters the current time into the field. Alternatively, the *Choose date/time* button may be used to select a specific date and time from a calendar.
- **Deadline** - specifies the date and time before which the project should be complete.
- **Owner** - allows the selection of the user who will be set as the project owner using the *Select* button. Projects that belong under workgroups may only select from users who are members of the given workgroup. The owner is usually the user who ensures that the project is completed successfully and automatically has full permissions for this project. By default, the user who created the project is entered.
- **Status** - allows one of the predefined project statuses to be selected. Statuses are used to indicate which life cycle step the project is currently in.
- **Allow task ordering** - if checked, the order of tasks that belong under the project can be changed using arrow buttons.
4. The editing interface of the newly created project will now be displayed and the details of the current project can be viewed. These include the properties described above and the Progress of the project, which is automatically calculated as the average progress of all tasks under the project.

Click **OK** to create the project.

5. The **General** tab allows editing of the same properties that were entered when the project was created.
6. Here, the displayed permission matrix can be set to determine what type of users are allowed to perform actions related to the project and its tasks.

The following permissions are available:

- **Access to project** - users with this permission are allowed to view and access the project.
- **Create** - users with this permission are allowed to create new tasks under the project.
- **Modify** - users with this permission are allowed to modify the tasks under the project.
- **Delete** - users with this permission are allowed to delete tasks under the project.

These permissions can be assigned to:

- **Nobody** - nobody can perform the action.
- **All users** - all users can perform the action.
• **Authenticated users** - only signed-in users can perform the action, i.e. anonymous public users cannot perform it.
• **Group members** - only members of the workgroup that the project belongs to can perform the action. This option is only available for projects under workgroups.
• **Authorized roles** - only users that are assigned to the roles selected below can perform the action. For workgroup projects, only the roles defined for the given workgroup may be selected.

**Project security exceptions**

1. The user who is set as the owner of a project automatically has full permissions for that project.

2. A task can be modified by users that it is assigned to or owned by regardless of the security settings of the project that the task belongs under.

3. Users who can manage a workgroup have full permissions for all projects under the given workgroup.

4. The permissions set for individual projects may not be applied if the entire Projects section of the department or workgroup that contains the given project is configured to have different security settings by the portal administrators.

Click **OK** to close the dialog and save any changes.

7. The lower part of the project editing interface is taken up by a list of tasks that belong under the current project. To learn about using tasks, please continue in the **Managing tasks** topic.

### 12.3 Managing tasks

In the **Creating a new project** topic, you have learned where and how projects can be accessed, created and configured. This topic focuses on the use of tasks. Please be aware that this example is from the point of view of a user with full access to the used project and all of the described actions may not be available for other users.

1. Access the portal and sign in as Brad Summers (user name **BradS** with a blank password). Navigate to the **Departments** section, select the **IT** department, open its **Projects** section and **Edit ( )** the sample **Network Upgrade** project.
2. You will now see the selected project’s editing interface, as described in the previous topic. This project however already has several tasks under it and you can see them displayed on the bottom part of the page.

3. A dialog will appear where you can define the following properties of the new task:

- **Title** - name of the task.
- **Owner** - allows the selection of the user who will be set as the task owner using the *Select* button. Tasks that belong under workgroup projects may only select from users who are members of the given workgroup. The owner is usually the user who checks that the task is being completed correctly. To help keep track, the owner of a task automatically receives a notification e-mail whenever the task is modified. By default, the user who created the task is entered.
- **Progress** - a percentage representing the amount of progress that has been made on the task. It must be entered manually for tasks.
- **Estimate** - is used to set an approximate amount of hours that the completion of the task should take.
- **Deadline** - specifies the date and time before which the task should be complete. Clicking the *Now*
link enters the current time into the field. Alternatively, the Choose date/time ( ) button may be used to select a specific date and time from a calendar. If the specified deadline is reached without the task being set to the Finished status, an e-mail notification informing about this is automatically sent to the user to whom the task is assigned.

- **Status** - allows one of the predefined task statuses to be selected. Statuses are used to indicate which life cycle step the task is currently in, e.g. when a task is completed, the Finished status should be set to mark it as such. Statuses may cause tasks to be displayed with a specific background color.

- **Priority** - allows one of the predefined task priorities to be selected to set how urgent the task is.

- **Is private** - if checked, the task will only be displayed to its owner, the user to whom it is assigned and to users who have permissions to manage the project that the task belongs under (if applicable).

- **Assigned to** - allows the selection of the user who should complete this task using the Select button. Tasks that belong under workgroup projects may only select from users who are members of the given workgroup. A notification e-mail is automatically sent to the specified user when the task is created or modified.

- **Description** - text containing the goal of the task and any other relevant information. Please refer to the Other features -> WYSIWYG editor topic for information about using the available actions above the editing area to format the entered text.

Click **OK** to confirm the creation of the task.

4. Each displayed task has several possible action buttons that can be applied to it.
Edit - opens a dialog very similar to the one shown when creating a new task, which can be used to update the task to reflect its progress. It contains one additional field called **Task URL**. The value of this field can be used to create links directly to the editing dialog of the given task.

Delete - allows tasks to be permanently removed.

Send reminder - can be used to quickly send an e-mail to the user to whom the task is assigned. The sent e-mail automatically uses a format that contains the name of the related task and a link to it, so this information does not have to be explicitly entered into the dialog used to enter the e-mail text.
- **Move up, Move down** - allows tasks to be permanently moved one place up or down in the project task list. The order in which all tasks are displayed may also be temporarily changed to sort by the values of a selected task property by clicking on the name of that property in the list header.

The information given in this topic applies to managing tasks not only directly under a project but also on the **Projects and tasks** section of the employee profile.
Part XIII

Intranet widgets
13 Intranet widgets

13.1 Intranet widgets overview

Widgets are web page elements that serve for customization of selected pages of the portal, typically the Home page of particular workgroups and each user's My Dashboard page. The Intranet Portal comes with a number of widgets that are specific for the context of the portal. There are two groups of these specific widgets - workgroup widgets and project management widgets for My Dashboard. In the Select widget dialog, which is depicted in the screenshots below, users can only see those widgets that can be used on the current page:

Workgroup widgets

Workgroup widgets are located in the Intranet portal -> Workgroups widget category. These widgets can be added to the Home page of particular workgroups by the workgroup administrators:

- **Workgroup administrators** - displays a list of administrators of the current workgroup.
- **Workgroup latest blog posts** - displays a list of the latest blog posts published in the current workgroup's Blogs section.
- **Workgroup latest forum posts** - displays a list of the latest forum posts published in the current workgroup's Forums section.
- **Workgroup latest news** - displays a list of the latest news published in the current workgroup's News section.
- **Workgroup members** - displays a list of all members of the current workgroup.
- **Workgroup messages** - displays a list of the latest messages published on the current workgroup's message board (on the Board page).
- **Workgroup quick links** - displays quick links to the most frequently used parts of the current workgroup's section. The links are fully customizable in the widget properties dialog.
- **Workgroup recent pages** - displays a list of the latest articles published in the current workgroup's Wiki section.
- **Workgroup upcoming events** - displays a list of the nearest upcoming events scheduled in the current workgroup's Calendar section.

All of the widgets listed above display content from the workgroup selected based on the current page context. This means that they display content of the particular workgroup on whose Home page the widget is placed. Besides these specific widgets, there is also a number of other widgets that can be added to the Home page of workgroups. The other widgets are also offered in the Select widget dialog, along with the ones listed above.

Please refer to the Workgroups -> Modifying workgroup home page topic for more details on how the workgroup Home page can be customized using widgets.
Project management widgets for My Dashboard

Project management widgets are located in the Intranet portal -> Project management widget category. These widgets can be used by each employee on their personal My Dashboard page:

- **My projects - Intranet portal** - displays a list of all projects that the current user has permissions to access.
- **Tasks assigned to me - Intranet portal** - display a list of all tasks that are assigned to the current user.
- **Tasks owned by me - Intranet portal** - displays a list of all tasks that are owned by the current user.

To find out more about the project management features of the portal, please refer to the Project management chapter of this guide. To learn how the My Dashboard page can be used, please see the Employees -> Using My Dashboard topic.
Other widgets

Besides these specific widgets, there is also a number of other widgets that can be used on the My Dashboard page. The other widgets are also offered in the Select widget dialog, along with the ones listed above. For example, the Maps category selected in the screenshot below contains widgets that can be used to display maps on the customizable pages.
Part XIV

Other features
14 Other features

14.1 WYSIWYG editor

The Intranet Portal comes with a built-in WYSIWYG editor. You can come across the editor in many parts of the portal, usually in dialogs used for adding or editing objects that contain blocks of text, for example when working with news items, events, Wiki pages and blogs or blog posts. Apart from other useful features described below, the main advantage of the WYSIWYG editor is that the content displayed while editing is nearly identical to the end result. The options offered by the editor can be accessed via a toolbar located above the given editing region.

![WYSIWYG editor toolbar](image)

The following actions are available on the WYSIWYG editor toolbar:

1. **Text formatting** - these buttons are used for text formatting. They include font adjustment, underlining, paragraph alignment, listing, indentation etc.

2. **Text styling** - these drop-down lists and buttons are used for text styling. They include style, format, font, size, text color and background color.

The remaining action buttons each have a specific purpose:

- **Insert/Edit link** - converts selected text into a link or inserts a link to the location of the cursor. Using this button opens a modal dialog (described in the Inserting a link section below), which can be used to configure the properties of the link. If the button is clicked while the cursor is placed within the text of an existing link, the properties of the given link can be modified through the editing dialog.
- **Remove link** - disables the selected link, converting it to plain text.
- **Insert/Edit anchor** - edits a selected anchor or adds a new one to the location of the cursor. An anchor is used to mark a specific place in the text that can serve as the target of a link.
- **Insert/Edit image or media** - allows an image or other type of media to be inserted into the text. Using this button opens a modal dialog (described in the [Inserting an image or media file](#) section below), which can be used to configure the properties of the object. An existing image or media file can have its properties modified through the editing dialog by selecting it and using this button (or by double clicking it).
- **Quickly insert image** - allows the selection of an image from your local disk to be inserted into the text without any additional configuration.
- **Insert/Edit table** - opens a dialog where a new table can be defined or an existing one can be modified. Once complete, the table is then placed into the text. An existing table can be modified by selecting it and using this button.
- **Insert horizontal line** - adds a horizontal line into the text.
- **Insert smiley** - allows the selection of an emoticon to be added into the text.
- **Insert special character** - inserts a special character to the location of the cursor, like for example an arrow, currency symbol, etc.
- **Insert page break** - inserts a page break into the text.
- **Maximize the editor size** - can be used to expand the text editing area and the toolbar across the entire page. Clicking it again returns the editor to its original size. This action is not available for all text editing dialogs.

Please note that the actions available on the WYSIWYG editor toolbar may vary based on the settings specified by the portal administrators.

**Inserting a link**

There are four possible types of links that can be made using the different tabs of the dialog.

The **Attachments** tab allows the creation of links to files attached to the currently edited document. An existing file attachment can either be selected from the list or a new one can be added to the document using the **New file button**. The **List**, **Tiles** and **Thumbnails** buttons may be used to change the view mode used for the attachment list. The attachments can also be managed by using the various available action buttons.

When an attachment is selected, its URL can be found on the **General** tab on the lower part of the dialog. Here, the **Target** tab can be used to select where and how the target object should be displayed when the link is clicked and the **Advanced** tab allows certain HTML attributes of the link to be set.
The **Web** tab is where standard hyperlinks can be made simply by entering a **URL**. The **Target** and **Advanced** tabs in the lower part of the dialog have the same purpose as described above for **Attachment** links.

The **Anchor** tab can be used to create links to anchors placed into the text.

Standard "mailto" links can be defined on the **E-mail** tab. When this type of link is clicked by a user, a new mailing window is opened in the user's e-mail program (e.g. Outlook) with the values specified on this tab filled into the appropriate e-mail fields.
Inserting an image or media file

The tabs at the top of dialog window determine the type of source that will be used for the image or media file. The Attachments tab can be used to select a file that is attached to the currently edited document. The listed attachments can be managed using the procedures described above for the Insert link dialog. On the Web tab, any web file can be specified as the source by entering its URL and Media type.

Once a file is selected by either one of the mentioned methods, the tabs on the lower part of the dialog can be used for further configuration, depending on the type of the file. The General tab contains basic options such as size and alignment, or autoplay settings for video/audio files. The Link tab can be used to set image files to work as links by specifying a URL and how the target page should be displayed. On the Advanced tab, certain HTML attributes of image files can be configured. The Behaviour tab allows special actions to be defined for image files. These actions, like for example opening the image in full size, are performed when a user clicks or hovers over the displayed image.
14.2 RSS feeds

In various sections of the portal, it is possible to subscribe to RSS feeds of the section's content. This is convenient in case that you don't want to browse to particular sections of the portal in order to find if new content was added. Using RSS feeds, you can be notified about newly added content automatically and keep track of activity on the portal.

RSS feeds are available with the following content, both in the portal's global section and in each department or workgroup section:

**News**

RSS feeds of news can be accessed by clicking the icon next to the header of the list of news (as highlighted in the screenshot below). The icon is present in the news listing in both the global section and in the dedicated sections of departments and workgroups.

It is also possible to access the feed by clicking the icon in the Latest news box on the Home page of the global section, as well as on the Home page of particular departments or workgroups.

**Events**

RSS feeds of events can be accessed by clicking the icon next to the header above the calendar, as can be seen in the screenshot below. This icon is present both on the global section's Events page and on the Calendar page of each department or workgroup.

It is also possible to access the events feed by clicking the icon in the Upcoming events box on the Home page of the global section, as well as on the Home page of particular departments or workgroups.
Blog posts

Blog posts can also be consumed in the form of an RSS feed. To access the blog post feeds, click the icon next to the header above the list of the latest blog posts, both in the portal's global section and in each department's or workgroup's Blogs section.

It is also possible to access the feeds by clicking the icon in the Latest blog posts box on the Home page of the global section, as well as on the Home page of each department or workgroup.

Forum posts

The last type of content that can be consumed via RSS feeds are forum posts. On the title page of the Forums section, both in the global section and in the sections of particular departments and workgroups, you can access the feed by clicking the icon in the Latest posts box, as highlighted in the screenshot below.

It is also possible to access the feeds by clicking the icon in the Latest forum posts box. This box is only displayed on the Home page of particular departments or workgroups, the Home page of the global section doesn't contain this box.
Viewing the feeds

RSS feeds can be consumed by a large variety of applications - so called RSS readers. In this topic, we will use Microsoft Internet Explorer, which, apart from being a web browser, can also be used as an RSS reader. To view an RSS feed, just click the feed icon of any feed on the portal. You will see a page similar to the one captured in the screenshot below, which is the feed of the global section's news.

As you can see, the feed contains particular news published in the global section, ordered by the date of publishing. Each news item is represented by its title and teaser text. Clicking the title redirects you to the news item's page on the portal. The browser's address line (highlighted by rectangle 1 below) contains the URL of the displayed feed. You may use this URL to consume the RSS feeds in any other RSS reader according to your personal preferences.

To subscribe to the displayed feed in Microsoft Internet Explorer, click the Subscribe to this feed link, which is highlighted by rectangle 2 in the preceding screenshot. The dialog depicted below will pop up. Enter the following details:

- **Name** - name of the feed that will be displayed in the browser's list of feeds.
- **Create in** - the folder under which the feed will be stored. You can create a new folder using the New folder button.
- **Add to Favorites Bar** - if enabled, the feed will be added to the browser's Favorites bar.

When you have the details filled in, click Subscribe to subscribe to the feed.
The feed will be added to the **Feeds** tab of the browser's **Favorites** menu, as can be seen below. From now on, you can conveniently view content of the feed by selecting the feed from this menu.

Security of department and workgroup feeds

RSS feeds of [department](#) or [workgroup](#) content contain only titles of the new content. These titles work as links to the page where the new content is published. This happens for security reasons, as RSS feeds can not be secured and anybody who knows the feed URL can subscribe to it. To prevent users without appropriate permissions from viewing secured content, only links are included in the feeds. This way, users have to log on to the secured portal to see the actual content.
14.3 Using Wikis

Each department and workgroup has the **Wiki** section. This section is intended for publishing of articles within the context of the department or workgroup. Only users with appropriate permissions can add new articles in this section or edit the existing ones, while the rest of the department or workgroup members can only view the published articles. To demonstrate the **Wiki** section's functionality, we will use the **IT** department, which has some sample content, including two wiki articles.

Log on to the portal as **Ruth Baker** (username **RuthB** with blank password), who is one of the sample users shipped with the portal and also an ordinary member of the **IT** department. Once logged on, select **Departments** in the main menu and click the **IT** department in the displayed list of departments, which redirects you to the department's **Home** page. There, select **Wiki** in the main navigation. You should see a list of published articles, as depicted in the screenshot below.

### Viewing Wiki articles

Ordinary members of the department or workgroup who do not have necessary permissions can only view the published article. To view an article, click its name in the article listing.

The full text of the article will be displayed, as you can see in the following screenshot.
Creating new Wiki articles

Only users with appropriate permissions can create new wiki articles. To demonstrate this in practice, log out of the portal and log back in as Brad Summers (username BradS with blank password), who is the head of the IT department and has the necessary permissions to create new articles. Once logged in, navigate to the Wiki section of the IT department and click the New page link above the list of articles.

You will be redirected to the New document dialog where you need to fill in the following fields:

- **Article title** - the title of the article displayed in the articles listing; a required field.
- **Article text** - the actual text of the article; a required field.
- **Publish from** - the date and time when the article will be published on the portal; an optional field. Current date can be used by clicking the Now link, or you can pick a date from a calendar after clicking the icon. If you leave this value blank, the article will be published right after its saving.
- **Publish to** - the date and time until when the news will be published on the portal; an optional field. Current date can be used by clicking the Now link, or you can pick a date from a calendar after clicking the icon. If you leave this value blank, the article will be published permanently until it is deleted or its configuration modified.

You can use the built-in WYSIWYG editor to edit content of the Article Text field. The WYSIWYG editor is used in various parts of the portal and you can learn more about it in Other features -> WYSIWYG editor.

When you have the field filled, click the Save icon to save the article. Before saving, you may check if correct spelling was used in the text by clicking the Spell check icon.
Now if you navigate back to the list of articles, you should see that the new article is present in the list (unless you configured the Publish from value to some future date and time).
Editing and deleting existing articles

Users with appropriate permission (just as BradS, who we are using at this part of the example) can also edit or even delete the listed articles. To try this out, view the new article that you created in the preceding part of this topic. In its detail, you should see the following two links above the article's title:

- **Edit** - clicking this action opens the same dialog that is was used to create the article (as described in the preceding part of this topic). In the dialog, you may change values of particular fields of the article and click **Save** to save the changes.
- **Delete** - clicking the link opens a dialog where you need to confirm deletion of the article. If you leave the **Destroy document and its history** option enabled, the article will be deleted permanently, i.e. it will not be possible to restore it.

14.4 Using message boards

Message boards allow users to view and post text messages and can be found on the Board section of workgroups and on employee profiles. They function in a way similar to Forums, but are simpler and unstructured. Messages are displayed in chronological order from newest to oldest.
To demonstrate the actions that can be performed on a message board, we will use the Microsoft Office Upgrade workgroup, which contains some sample messages. Please be aware that some of them may not be available. The portal or workgroup administrators decide which of them are enabled.

**Adding a message**

1. Access the portal and sign in as Ruth Baker (user name RuthB with a blank password), one of the sample users, who is a member of the workgroup. Now navigate to the Workgroups section of the portal, select the Microsoft Office Upgrade workgroup and go to its Board section.

2. Scroll to the bottom part of the page and fill in the following fields of the Leave message dialog:

   - **Name** - the name that will be displayed above the new message. By default, the full name of the current user is entered.
   - **Your URL** - if entered, the name of the message author will serve as a link to this URL. For example, this could be used to create a link to the author's employee profile page.
   - **Your e-mail** - the e-mail address of the message author. By default, the address of the current user is entered.
   - **Message** - the text content of the message.
   - **Subscribe me to this message board** - if checked, the address specified in the Your e-mail field
will be subscribed to the message board when the message is added. Subscription is described below.

Post the message by clicking the **Add** button.

**Reporting abuse**

Offensive or inappropriate messages can be brought to the attention of the portal administrators by clicking the **Report abuse** link on the bottom right of the message. A window will appear where you can describe the reason for the report and send it by using the **Report abuse** button.

**Subscribing to the board**

Subscription allows you to keep track of the message board by sending you an automatic notification e-mail using the following format whenever a new message is added.

1. To subscribe to the board, click the **Subscribe** link on the right below the displayed messages.
2. Doing so will cause the **New subscription** dialog to appear, where you can enter the address that the notification e-mails should be sent to into the **Your e-mail** field. By default, the address specified in your employee profile is filled in, but you can enter a different address.

Confirm the subscription by using the **Subscribe** button.

3. It is possible to unsubscribe from the board using a link provided in any of the notification e-mails.

**Moderating the board**

To ensure that the messages posted on the board follow certain rules or guidelines, some users may be designated as message board moderators. Workgroup administrators are automatically allowed to moderate their workgroup board and every user may moderate the boards located on their own employee profile. Moderators are given rights to perform additional actions on the board as shown in the following example:

1. Sign out and log on as Brad Summers (user name *BradS* with a blank password), a sample user who is allowed to moderate the board.

2. Messages are categorized into two groups, rejected and approved. Approved messages can be seen normally by all users with access to the board, while rejected messages are only visible by board moderators. In some cases, the board may be configured to be moderated, which means that all new messages are created in the rejected state by default and notification e-mails are automatically sent to the board moderators informing them about messages waiting for approval. The state of a message can be changed using the **Reject** or **Approve** links.
3. It is possible to alter any message on the board by clicking the Edit link next to the given message. Messages may also be permanently removed using the Delete link.

Editing a message opens a dialog through which its following properties can be modified:

- **Name** - the name that is displayed above the new message.
- **Your URL** - if entered, the name of the message author will serve as a link to this URL.
- **Your e-mail** - the e-mail address of the message author.
- **Message** - the text content of the message.
- **Is approved** - if checked, the message is approved, otherwise it is rejected.
- **Is SPAM** - if checked, the message will be marked as spam and will not be visible by regular users.

14.5 Available themes

The portal comes with three different color themes - **Blue**, **Green** and **Red**. These color themes can be applied separately to the portal's global section and to particular departments and workgroups. While the global section's and department sections' color theme can only be modified by the system administrators via the system's administration interface, workgroup administrators can change the color themes of their workgroups directly on the portal, as described in [Workgroups -> Managing workgroups](#).
The following screenshots illustrate how the global section's Home page looks when respective themes are applied.

**Blue**

![Blue Intranet Solution](image)

**Welcome to Your New Intranet**

This is a ready-to-use intranet that you can use out of the box. Or you can customize it as you need. For more information on how to configure your intranet, please see the Intranet Guide.

**NEWSALE OFFICE IN NEW YORK | 11/12/2010**

We have just opened a new sales office in New York. It will be managed by Jennifer Wilson. The office is located on the 8th avenue.

**Employee of the month**

![Employee profile image]

**Green**

![Green Intranet Solution](image)
Welcome to Your New Intranet

This is a ready-to-use intranet that you can use out of the box. Or you can customize it as you need. For more information on how to configure your intranet, please see the Intranet Guide.

LATEST NEWS

SCHEDULED NETWORK MAINTENANCE (1/12/2010)
Due to the scheduled upgrade of our network infrastructure, the local network as well as our VPN will not be available during this Saturday, between 6am and 8am.

RECORD SALES IN Q3 (1/12/2010)
The third quarter was the best quarter in our history! We grew the sales by 70% year-to-year. Thanks to everybody to their hard work.

NEW SALES OFFICE IN NEW YORK (1/12/2010)
We have just opened a new sales office in New York. It will be managed by Jennifer Wilson. The office is located on the 8th avenue.

Red
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