
Intranet Portal Course for Beginners

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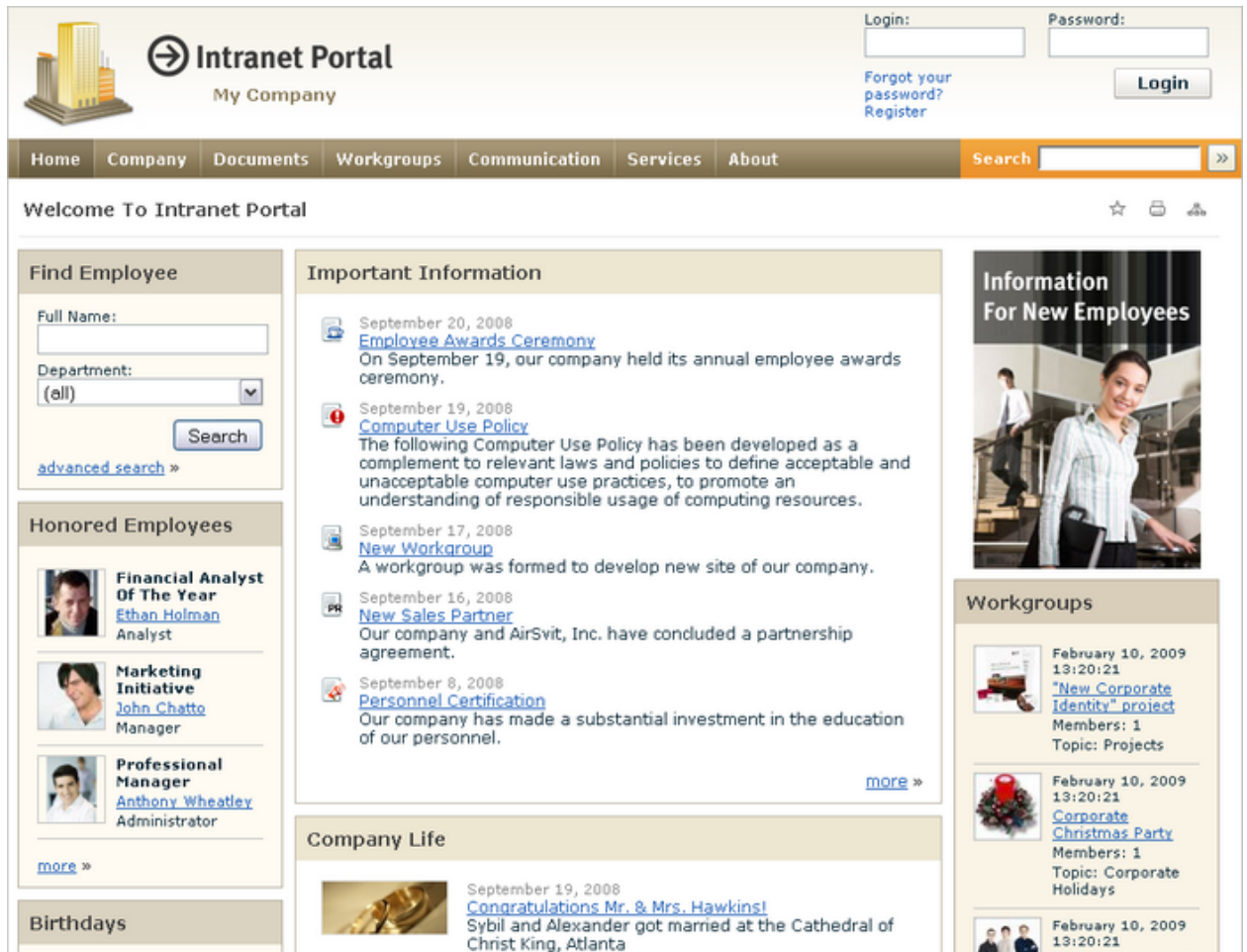
Introduction

The first thing you should know about Bitrix Intranet Portal: it is an application that requires a bit of special knowledge. However, it is not difficult to use if you carefully study this course which describes in detail how the portal works.

The course introduces the main principles of portal usage and mechanisms of individual modules of the system. The stepwise nature of the course ensures that you get the proper and correct knowledge. If you want, you can deviate from the proposed structure and focus your attention on the required sections only.

Main page

A user acquaints with the company from the portal **main page**, a kind of desktop containing the areas showing:



The screenshot displays the Bitrix Intranet Portal main page. At the top left is the Bitrix logo and the text "Intranet Portal My Company". To the right are login fields for "Login:" and "Password:" with a "Login" button and links for "Forgot your password?" and "Register". Below this is a navigation menu with tabs: Home, Company, Documents, Workgroups, Communication, Services, and About. A search bar is located on the right side of the menu. The main content area is titled "Welcome To Intranet Portal" and features several sections: "Find Employee" with a search form for "Full Name:" and "Department:" (set to "(all)"); "Honored Employees" listing "Financial Analyst Of The Year" (Ethan Holman, Analyst), "Marketing Initiative" (John Chatto, Manager), and "Professional Manager" (Anthony Wheatley, Administrator); "Birthdays" section; "Important Information" with a list of recent news items including "Employee Awards Ceremony", "Computer Use Policy", "New Workgroup", "New Sales Partner", and "Personnel Certification"; "Company Life" with a "Congratulations Mr. & Mrs. Hawkins!" announcement; and "Information For New Employees" with a photo of a woman. A "Workgroups" section on the right lists recent projects like "New Corporate Identity" and "Corporate Christmas Party".

- which company's events have taken place lately;
- various information about the company employees: podium (honoured employees), birthdays, fresh and absent employees;
- recent blog and forum posts, etc.

Using links in these areas, you can switch to a corresponding site section containing the detailed information.

Registration and Authorization

All the company employees obtain access to the portal resources according to the access permissions set by the **administrator**.

Before working with the portal:

1. **unregistered** employees must register;
2. **registered** employees must authorize.

Registration

Click **Register** in the upper right corner of the screen to open the new member registration form:

Register

Name:	<input type="text" value="John"/>
Last Name:	<input type="text" value="Howard"/>
*Login (min. 3 symb.):	<input type="text" value="user"/>
*Password:	<input type="password" value="••••••"/>
*Password confirmation:	<input type="password" value="••••••"/>
*E-Mail:	<input type="text" value="john@example.com"/>

The password must contain at least 6 symbols.

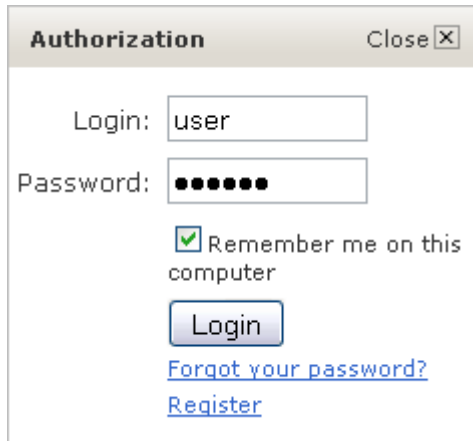
*Required fields

Specify the required information in the registration form: **First name, Last name, Login, Password, Confirm password, e-mail address**.

Click **Register**. The page will refresh. Now, you can start working with the portal.

Authorization

All the company members must authorize before they start working with the portal. Click **Login** in the upper right corner to authorize.



The screenshot shows a web form titled "Authorization" with a "Close" button in the top right corner. The form contains the following elements:

- A "Login:" label followed by a text input field containing the text "user".
- A "Password:" label followed by a password input field with seven black dots.
- A checked checkbox with the text "Remember me on this computer".
- A "Login" button.
- Two blue hyperlinks: "Forgot your password?" and "Register".

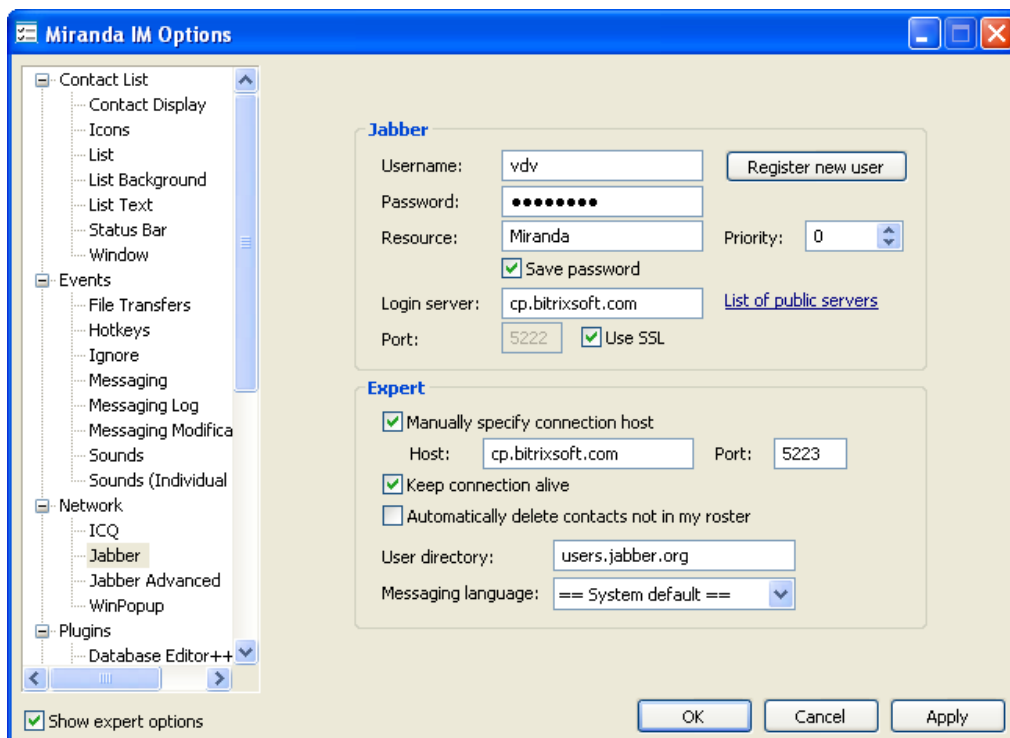
In the form opened, enter your **Login** and **Password** and click **Login**. As soon as the page updates, you can start working with the portal.

Instant Messenger Configuration

In order to set up communication between the Intranet portal users, almost any instant messenger can be used; the only requirement is the support of XMPP protocol. We tested several messengers and can recommend you to try Miranda IM.

If you use any other messenger, you have to find the corresponding options in the messenger configuration window.

- Open the Miranda options dialog and select the *Network > Jabber* page.



- Enter your Intranet portal login and password in the **User** and **Password** fields.
- Type the domain of your server in the **Server** field.
- Ask your Intranet portal administrator to advise you of the XMPP server port. Type the port number in the corresponding field.
- Ask your administrator if SSL is used by the server. If so, check the **SSL** box.
- Leave other fields as is. Click OK to save changes.

Employees

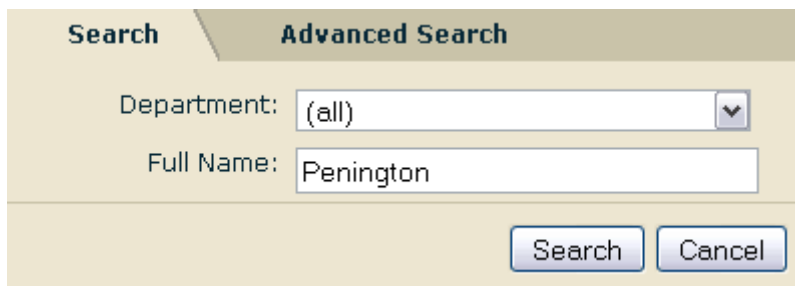
The **Employees** section contains all the required information about the company staff and structure.

- If you need to find an employee and/or obtain a brief information about them, open the **Find Employee** page and find a user.
- The **Company Structure** page displays a vivid and illustrative view of the hierarchy of company's departments, subdivisions, branches or affiliates. Click a subdivision to view its inner departments, or a department to view its members.
- Each employee has a **Personal Profile** page that shows their personal and official information. A user can add friends; create groups; publish photos; create forum topics and blog posts; manage their personal calendar and file storage.
- A **Staff Changes** page registers changes that took place in the career of the employees. You can look through the changes on the whole company or on a certain department.
- If an employee is absent for some reason, this event is registered in the monthly **Absence graph**. The absence graph can be built for a certain department and the list may contain all employees, not only the absent ones. To look through the graph for other months, use the navigation buttons.
- Featured and honored employees become depicted at the **Honored Employees** page. In the user profile title, the reason of being listed at the **Honored Employees** is specified.
- The **Birthdays** page is aimed to send birthday greetings or find the soonest birthdays. You can select a department for which the birthday information is required.
- Any introductory information that a new employee may demand can be found on the **For New Employees** page.

Finding Users

To find a specific user, you can use either **simple** or **advanced** search mode.

- Simple mode: in the filter form, specify the **Department** or the **Full name** to match an employee.




The screenshot shows a search interface with two tabs: 'Search' and 'Advanced Search'. The 'Advanced Search' tab is active. Below the tabs, there are two input fields: 'Department:' with a dropdown menu showing '(all)' and a downward arrow, and 'Full Name:' with a text input field containing 'Penington'. At the bottom of the form, there are two buttons: 'Search' and 'Cancel'.

- Advanced mode: to search an employee, fill in any of the following fields in the filter form: **Department**, **Position**, **Full name**, **E-mail**, **Keywords**.


Search	Advanced Search
Department:	<input type="text" value="(all)"/>
Position:	<input type="text" value="Accountant"/>
Full Name:	<input type="text" value="Penington"/>
E-mail:	<input type="text"/>
Keywords:	<input type="text"/>
<input type="button" value="Search"/> <input type="button" value="Cancel"/>	

The found profiles will show under the filter form:


	<p>Penington Emily Accountant E-Mail: besshadev@example.com Mobile: 683-24-85 ICQ: 275-376-286 Departments: Accounts Department</p>	Send message
--	--	------------------------------

Alternatively, you can find employees using the **ABC panel**. Click a letter to view the list of employees whose name begins with the selected letter.

To switch the result view modes, use **List** and **Details** buttons on the context toolbar:

Letter: **A-Z** View:    Excel


For example, the **List** mode shows the employee profiles in the following manner:





Bickerton Emily

Manager

E-Mail: pee@example.com
 Mobile: [945-25-45](tel:945-25-45)
 Departments: [Transaction Centre](#)

 [Send message](#)


 [Out of office](#)





Cowell Emily

Call Center Girl

E-Mail: cea@example.com
 Mobile: [647-48-44](tel:647-48-44)
 ICQ: 754-559-965
 Departments: [Call Centre](#)

 [Send message](#)

The **Details** mode:

Photo	Full Name	Phone	Position	Departments
	Bickerton Emily		Manager	Transaction Centre
	Cowell Emily		Call Center Girl	Call Centre

The search results can be exported to **MS Excel** format by clicking  on the context toolbar.


Personal Page

For each employee, a **personal page** exists that shows their personal and official information.

To switch to your personal section, open *Employees > Personal Profile*. To view information about another employee, click a link with his name. The user's main page will open:

Daisy Allenby: Profile

- General
- Groups
- Photo
- Forum
- Blog
- Calendar
- Tasks
- Files



Daisy Allenby


Last Logged in: 02/25/2009 14:31:57
Position: [Accountant](#)
Departments: [Accounts Department](#)





Contact Information

E-Mail: chedvi@example.com
ICQ: 904-376-093
Mobile: [387-38-85](tel:387-38-85)
Work Phone: [175-76-90](tel:175-76-90)

Personal Details

Sex: [Female](#)
Birthday: [23 June](#)

 Online

-  [Edit Profile](#)
-  [Edit Privacy Settings](#)
-  [Edit Settings](#)
-  [My Subscription](#)

Groups

- [Corporate Christmas Party, Sales](#)
- [All Groups](#)
- [Search Groups](#)
- [Updates](#)

Tasks

No tasks assigned.

Forum

No posts in this forum

Blog

February 24, 2009 17:24:45
[Daisy Allenby](#)
[5 elephants killed in Kenya](#)

The elephants were killed in the Tsavo East National Park and its surrounding areas in southeastern ...

Views: 1

The first tab contains information about recently added friends, membership in groups, recent forum and blog posts. The fact of the employee being absent or at the Podium is also indicated at the main page of the personal section.

The following links open the personal settings configuration pages.

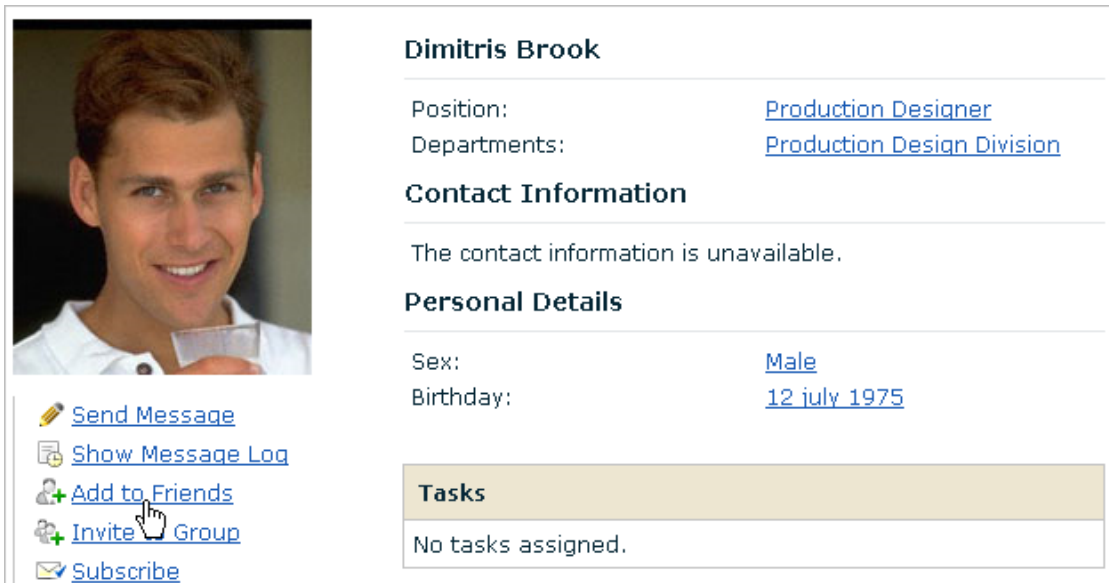
- **Edit Profile** is used to edit user information: contacts, personal and official information and authorization parameters.
- **Edit Privacy Settings** changes the permissions of other users to view your personal page, friends and groups; also defines users allowed to invite you to groups and send personal messages.
- **Edit Settings** enables or disables the portal features (Forum, Photo Gallery etc.), and assigns permissions with respect to these services.

Users Friends

Note! This feature is disabled by default. However, you can send a message to any employee to invite them to a group. The portal administrator can enable this feature.

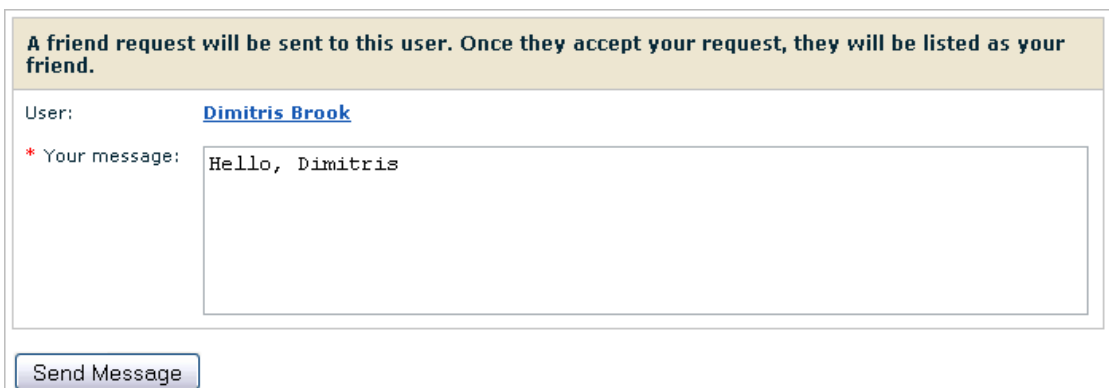
The **Friends** tab presents all the user friends. To add a friend, follow the steps below:

- Click **Add Friends** to open the **Find Employee** page.
- Find the required employee using this form (see the **Finding Users** lesson).
- In the profile found, click the user name link. The employee personal page will open.



The screenshot shows a user profile for Dimitris Brook. On the left is a profile picture of a man. Below the picture are several action links: [Send Message](#), [Show Message Log](#), [Add to Friends](#), [Invite Group](#), and [Subscribe](#). To the right of the picture, the user's name "Dimitris Brook" is displayed. Below the name, the position is "Production Designer" and the department is "Production Design Division". A section titled "Contact Information" states that the contact information is unavailable. Below that, "Personal Details" shows the user is "Male" and was born on "12 July 1975". At the bottom right, a "Tasks" section indicates "No tasks assigned."

- Click **Add to Friends**.
- Fill in the invitation form and click **Send Message**.



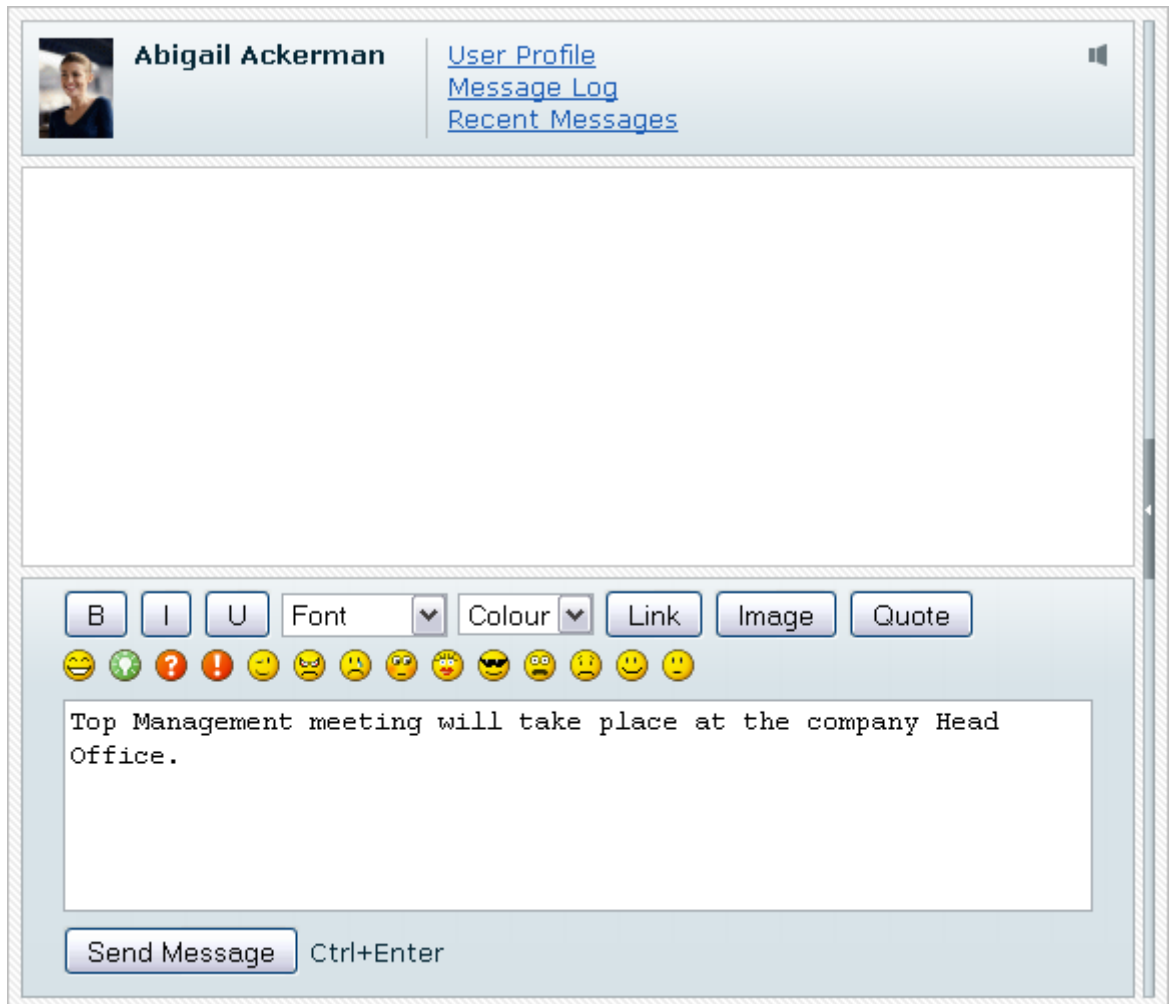
The screenshot shows a form for sending a message. At the top, a message reads: "A friend request will be sent to this user. Once they accept your request, they will be listed as your friend." Below this, the user's name "Dimitris Brook" is displayed. The form has a label "User:" followed by the name. Below that is a text area labeled "* Your message:" containing the text "Hello, Dimitris". At the bottom of the form is a "Send Message" button.

You will see the confirmation saying the message has been successfully sent. When the employee receives and confirms the invitation, they will appear in your friend list.

If an employee sends you a friend invitation, a corresponding message will immediately show in the left of a portal page.

To send a message to a user, do the following:

- Select the required employee.
- Click **Send Message**. The messaging window will appear:

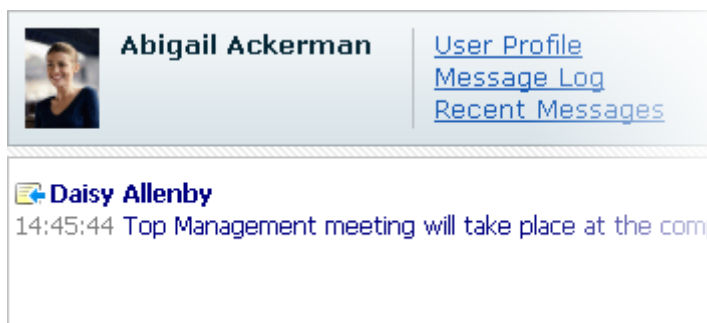


Abigail Ackerman [User Profile](#) [Message Log](#) [Recent Messages](#)


Top Management meeting will take place at the company Head Office.

Send Message Ctrl+Enter

- Type the message text and click **Send**. The new message will be shown in the dialog window.



Abigail Ackerman [User Profile](#) [Message Log](#) [Recent Messages](#)

 **Daisy Allenby**
14:45:44 Top Management meeting will take place at the comp

If a user sends you a message but the messaging window is not active, a notification will immediately show in the left of any portal page.

Workgroups

The **Groups** tab shows all groups you are assigned to. If you have permission, the **Create Group** link is available. Clicking it opens the group creation form:

Group Parameters

*Group Name:

*Group Description:

Group Image:

*Group Topic: ▼

Group Parameters: Visible to All
 Public Group, Anyone Can Join It
 Make Archive

Keywords:

*Who Can Invite to Group: ▼


Specify the required parameters of a new group and click **Create Group**. You will see a message indicating the group has been created successfully, and a link that opens the group page:











New product development: Profile

General	Calendar	Tasks	Discussions	Reports	Files	Photo	Members
----------------	----------	-------	-------------	---------	-------	-------	---------

New product development

Topic:	Production
Description:	New product development workgroup
Created:	02/10/2009 13:20:21
Members:	1
Group Type:	This is a private group. User membership is subject to administrator approval. This group is visible to anyone.



-  [Write message](#)
-  [Edit Group](#)
-  [Edit Settings](#)
-  [Delete Group](#)
-  [Edit Moderators](#)
-  [Edit Members](#)
-  [Ban List](#)
-  [Invite to Group](#)
-  [View Join Requests](#)
-  [Subscribe](#)

Reports

No messages in blog

Discussions

No posts in this forum

Tasks

No tasks assigned.

A group has its own photo gallery, forum, calendar, file storage.

To invite an employee to a group, do the following:

- Click **Invite to Group**. Invitation form will open.
- Fill in the invitation form and click **Send Message**.

An invitation to group message will be sent to the users. The users will be listed here after they have confirmed their membership.

* Users: **Serge Abbott** <bse@example.com> [83]

Group: [New product development](#)

* Your message:

I invite you to New product development workgroup

You will see a message indicating the invitation has been successfully sent. When the employee accepts it, they will appear in the group list.

If someone sends you a group membership invitation, a notification will immediately show in the left of any portal page.


Personal Photo Gallery

The **Photo** tab represents the employee personal photo gallery. You can configure other user's access to your photos in your profile.

The **Add album** link creates a new photo album. In the album creation form, specify the required parameters and click **Save**.

Edit album properties

*Name:

Date:
 




Description:

Set album password
Password:


Upon save, the new album becomes immediately added to the album list. To upload a photo, click **Upload Photos**.

The two photo upload methods are available: single upload and bulk upload. The last mode allows to add a whole folder by selecting it in the folder tree and clicking the **Add folder** button. To add individual photos from any directory, click **Add files**.

Add Folder Add Files

 prik_mrtxbiuy  prik_tlgomois  prik_zacvnohd

3 photos [Delete All](#)



Publish
Name: prik_tlgomois.jpg
Description:

Upload photos to album: Animals
Resize images to: original
Print watermarks:

Upload

Using this form, you can preprocess the photos before uploading: specify their titles and descriptions; publish photos; add the copyright sign etc. Note that only the published photos are visible. To upload photos, click **Upload**.

**Daisy Allenby**

Last Logged in: 03/05/2009 16:30:47
Position: Accountant
Departments: [Accounts Department](#)

 Online

[← Up](#) [+ New album](#) [+ Upload Photos](#)

**Animals**

03/05/2009
Photos: 3

- [Edit album properties](#)
- [Choose cover](#)
- [Delete album](#)

 [Slide show](#)

 [Edit](#)

**Personal forum**

This tab shows the users private forum. You can edit other user's access to your forum in your profile.

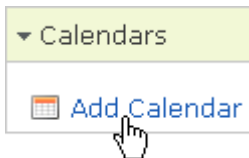
Personal blog

The **Blog** tab contains a users personal blog where other users can express their views on events and read their colleagues' opinions on the topic discussed. The access to the blog posts can be configured in the user's profile. If the blog is public to all employees, its posts are displayed in the *Communication > Blogs* section.

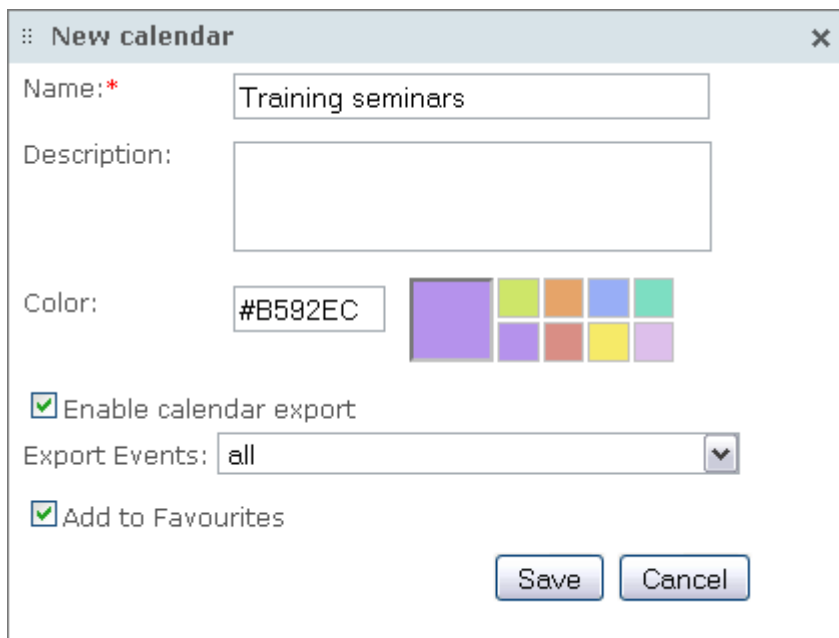
Calendar

On this tab, you can create as many calendars as needed whose events can be viewed in a single grid.

To add a new calendar, click **Add calendar**.



In the calendar creation form, specify the calendar name, select the event display color, and an optional description:

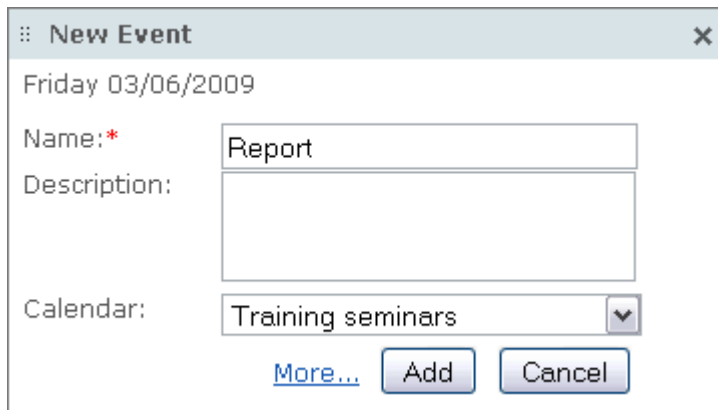
A screenshot of a 'New calendar' form. The form has a title bar with 'New calendar' and a close button. It contains the following fields and options:

- Name: * (required): Text input field containing 'Training seminars'.
- Description: Text area field, currently empty.
- Color: Text input field containing '#B592EC' and a color selection palette with 10 colored squares.
- Enable calendar export: Checked checkbox.
- Export Events: Dropdown menu with 'all' selected.
- Add to Favourites: Checked checkbox.
- Buttons: 'Save' and 'Cancel' buttons at the bottom right.

To confirm the calendar creation, click **Save**.


Events can take one day or many days. To add a one-day event, do the following:

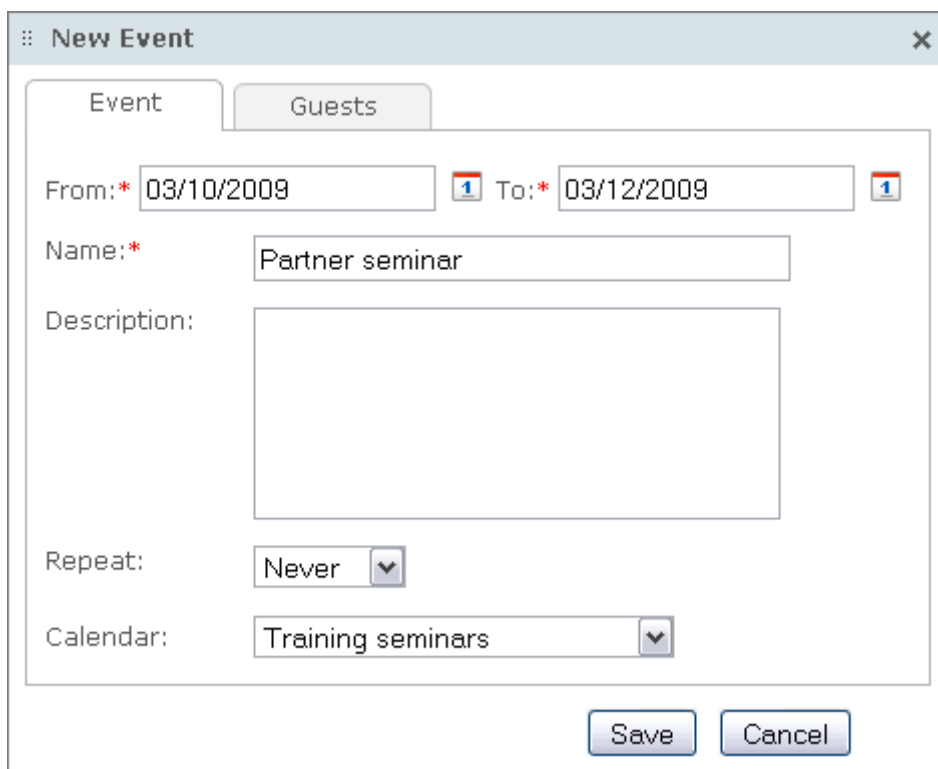
- In the calendar grid, click the event day. The event creation window will open.



- Specify the event name, select the calendar to which the event refers, and add the event description if needed.
- Click **Add**.

To add a multiple day event:

- Click  in the upper left of the calendar. The new event creation window will open:



- Remember to specify the event start date and finish date and the name; select the calendar to which the event refers.
- Click **Save**.

The calendar grid will show the events of the selected calendars only:

Event Calendar						
+ [] January February [] March, 2009 [] April May						
Mo	Tu	We	Th	Fr	Sa	Su
23	24	25	26	27	28	1
2	3	4	5	6	7	8
				Report		
9	10	11	12	13	14	15
	Partner seminar					
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Personal files

The file operations on the employees personal page are similar to those discussed in the **Documents** section.

You can configure the other user's access to your files in your profile.

Documents

The **Documents** area allows to share files, texts, documents, spreadsheets etc. and provides teamwork features.

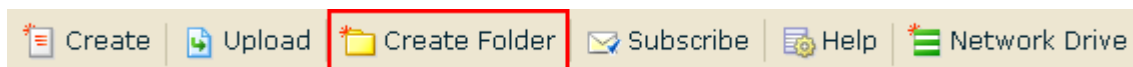
The access to all the site documents follows the permissions of a group to which a user belong. A document not being available for editing indicates that a user do not have an appropriate permission. The access permissions are defined by the portal **administrator**. Thus, if you want to edit a document but get the “access denied” message, you have to consult the portal **administrator**.

If you want to create a document section for a department but the latter is not shown in the left menu, you have to contact the portal **administrator** as well.

Managing the Documents Library in a Web Browser

Creating a Folder

In order to create a folder, open the **Documents** page (*Documents > Common Documents*). Click **Create Folder** on the context toolbar:










This will open a folder creation form:


Create Folder

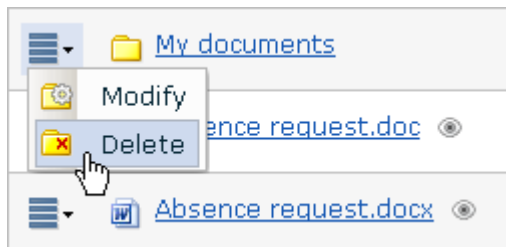
* Name:

Type the desired folder name and click **Save**. After the page reloads, the new folder will show in the file list:

	Name	Modif.	By	Size	Status
	 For Employees	02/10/2009 13:18:50	David Brown		
	 My documents	02/27/2009 16:01:39	David Brown		
	 Absence request.doc 	02/20/2009 13:37:04	David Brown	37.5KB	Published
	 Absence request.docx 	02/10/2009 13:18:53	David Brown	14.83KB	Published

Deleting a Folder

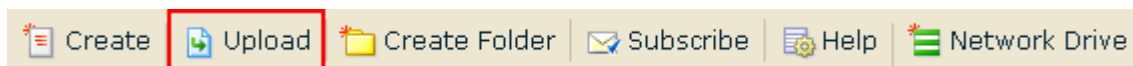
You can delete an unneeded folder by clicking on the actions button  in the row containing the folder to be deleted, and selecting **Delete** in the menu:



The system will ask that you confirm the deletion, and delete the folder upon positive answer.

Uploading Documents

Before you upload the documents, open the destination folder, and click **Upload** on the context toolbar:



An upload form will open. Here, you can choose one of the three view modes:

- **Standard** – uploads individual files from different folders (by clicking **Add Files**) or all files from a selected folder (by clicking **Add Folder**);
- **Classic** – uploads files from a selected folder;
- **Simple** - uploads individual files.

Choose the mode that fits you best and add the files to be uploaded.

Upload Files

Documents | Subscribe | Help | Network Drive

Path: Common Documents

The file size must not exceed **64 MB**.

View: Standard

Add Folder **Add Files**

Name	Size	Type	Modified
portal_user	1,989 KB	Microsoft Office Word 97 - 2003 Docu...	10/13/2008
portal_admin	4,383 KB	Microsoft Office Word 97 - 2003 Docu...	10/31/2008

Files: 2 [Delete All](#)

Title: portal_user.doc

Tags:

Description:

Overwrite existing file(s)?

Status for New Uploaded Files: Published

Upload

If you want to unconditionally update existing files, check the box **Overwrite existing files**. Otherwise, the system will notify you that a file (or files) already exists in the destination folder.

Select the status for new files and click **Upload**. The upload window will appear showing the upload progress:

File Upload

C:\docs\portal_admin.doc

Uploaded: 1.41 Mb of 4.29 Mb

Estimated time left: 1 seconds of 4 seconds

Close dialog box when upload completes.

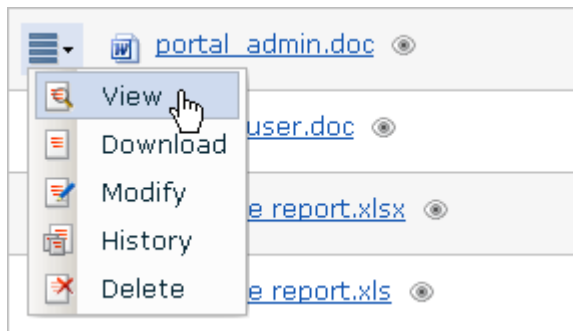
Cancel

After the files has been uploaded, the updated files page will show:

Name	Modif.	By	Size	Status
For Employees	03/02/2009 12:13:14	David Brown		
portal_admin.doc	03/02/2009 13:02:25	David Brown	4.28MB	Published
portal_user.doc	03/02/2009 13:02:20	David Brown	1.94MB	Published
Expense report.xlsx	03/02/2009 12:13:28	David Brown	10.15KB	Published

Viewing Documents

To view a document, click the action button of a required file and select **View** in the menu:



The file properties page will open:

View Element portal_admin.doc

Documents | Subscribe | Help | Network Drive

Path: Common Documents

File: [portal_admin.doc](#) modify delete history

Created: 03/02/2009 14:44:23 [David Brown](#)

Modified: 03/02/2009 14:44:23 [David Brown](#)

Size: 4.28MB download

Tags:

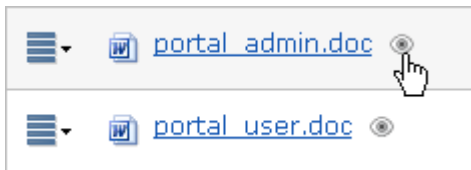
Description:

Workflow Parameters


Status: [1] Published [view original](#)

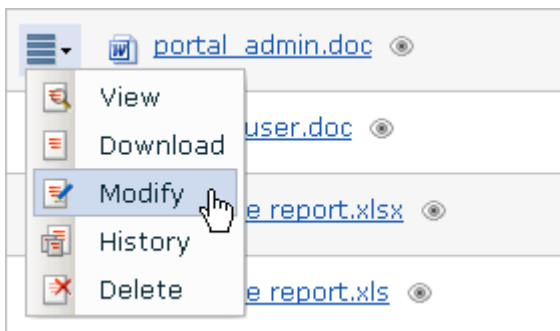
Comments: New File.

Alternatively, you can use the eye icon shortcut:



Editing Documents

In order to edit a document or modify its properties, click the actions button  in a row showing the document and select **Edit**:





A new form will open in which you can alter the document properties:

Edit Element


Documents | Subscribe | Help | Network Drive

Path: Common Documents

File:  [portal_admin.doc](#)  View

Created: 03/02/2009 14:44:23 [David Brown](#)

Modified: 03/02/2009 14:44:23 [David Brown](#)

Size: current version: 4.28MB  Download

General Parameters

*Name: .doc

Tags:

Replace File:

Active: Record active

Description:

Workflow Parameters

Status:


Comments:

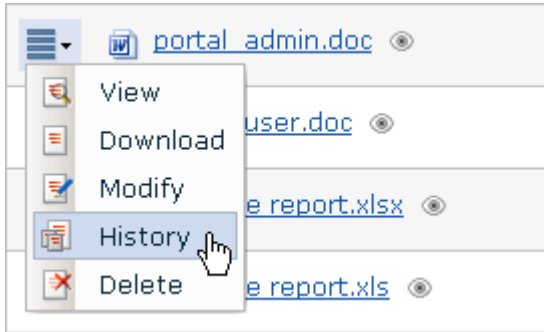
You can edit the file properties here. The following operations are available:

- the **General Parameters** group:
 - change the file **Name**;
 - specify the file **Tags** that will be used for search;
 - you can **Replace File** by selecting a new one;
 - activate or deactivate the file;
 - provide the **Description**.
- the **Workflow Parameters** group:
 - change the file **Status**;
 - add a file **Comment**.

Click **Save**.

File History (Change Log)

To view the document change log, click the actions button  in a row showing the document and select **History**:



A file change log form will open:

Element Modification History portal_admin.doc

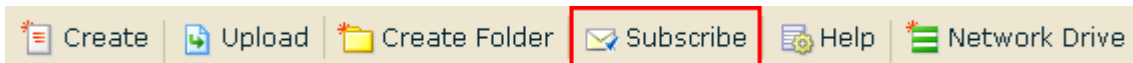
Documents | Subscribe | Help | Network Drive

Path: Common Documents

	ID	File	Status	Comments	Modified By	Modified
Current version:						
	639	portal_admin.doc	[1] Published	New File.	[1] (admin) David Brown	03/02/2009 14:44:23
Archive:						
<input type="checkbox"/>		640 portal_admin.doc	[1] Published	New File.	[1] (admin) David Brown	03/02/2009 14:44:32

Delete


You can receive all new comments on the library documents. Just click **Subscribe** on the context toolbar:

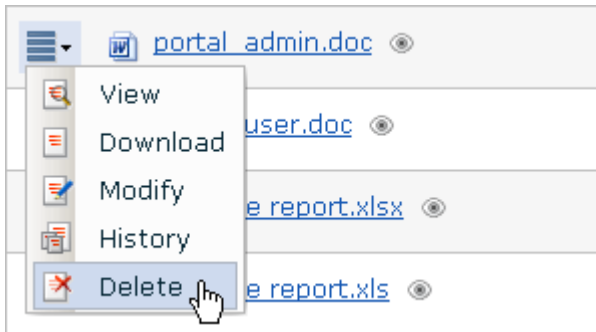


To cancel your subscription, click **Unsubscribe**:



Deleting Documents

Click **Actions**  in a row showing the document to be deleted. Select **Delete** in the action menu:



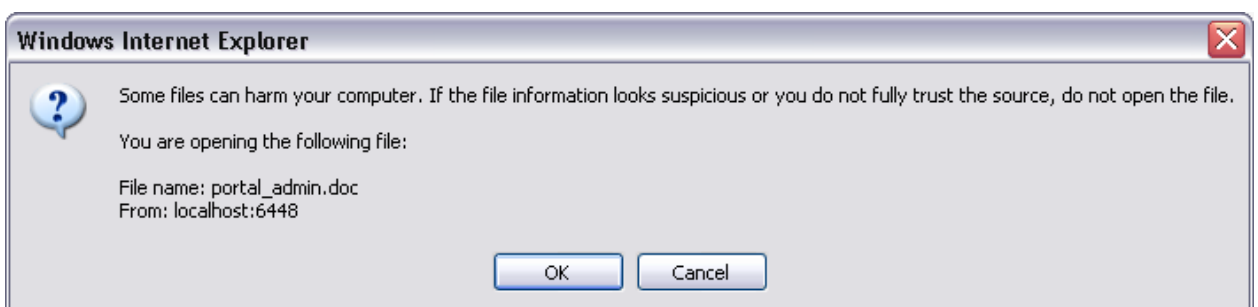
The system will ask that you confirm the deletion and only then delete the document.

Editing Documents Using Microsoft Office

If you want to edit documents in Microsoft Office, you should have it installed on your machine. The documents can **only** be edited from within Internet Explorer. This feature requires Microsoft Office 2003 or better.

Note! Your changes made to the **Microsoft Office** documents **will be lost** if you open them for editing using **any other** browser than Internet Explorer!

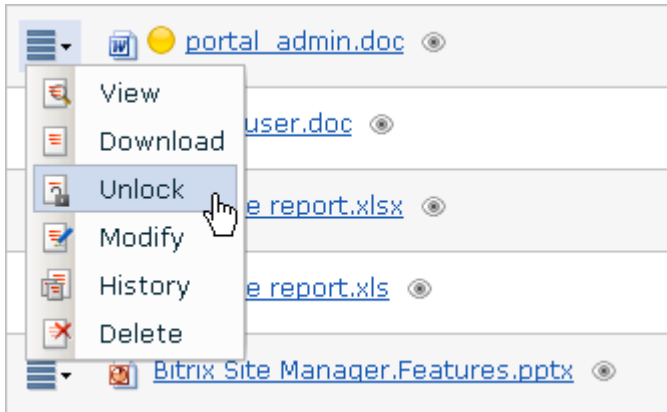
With Microsoft Word, Microsoft Excel, Microsoft PowerPoint documents, just click the document name. Click **OK** in the warning window:





This will run a Microsoft Office application matching the document type. Now edit the document as required. Save it and close the application. Modifications will be saved to the server Library.

Warning: the document remains locked for other users while you are editing it.

Be sure to unlock the file after you have finished with it. Click the actions button and select **Unlock** from the menu:



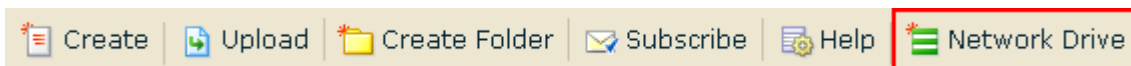
The state icon beside the document label shows the current state in which a document is. A yellow icon  means that you have locked the document. The red icon  indicates the document has been locked by someone else.

Using the Document Library in Windows

Any folder in the document library that can be accessed according to the user permissions, can be mapped to a network drive or folder at any Intranet portal computer. Being mapped, a folder can be browsed using Windows Explorer. This feature is available in the **Windows** operating systems, XP and newer with **Internet Explorer**.

Browsing a Web Folder in Internet Explorer

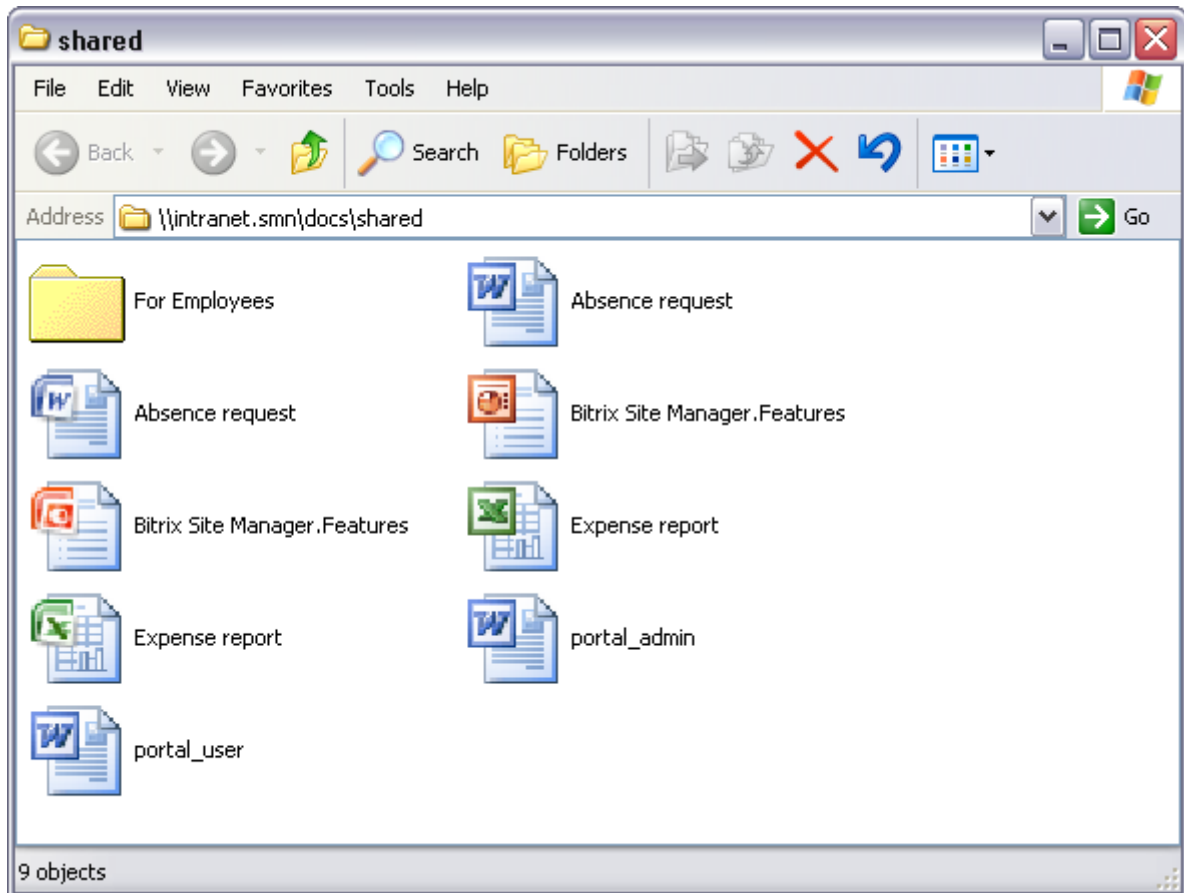
Open the required document library folder in your browser. Click **Network Drive** on the context toolbar:



When asked, enter your **User name** and **Password**:



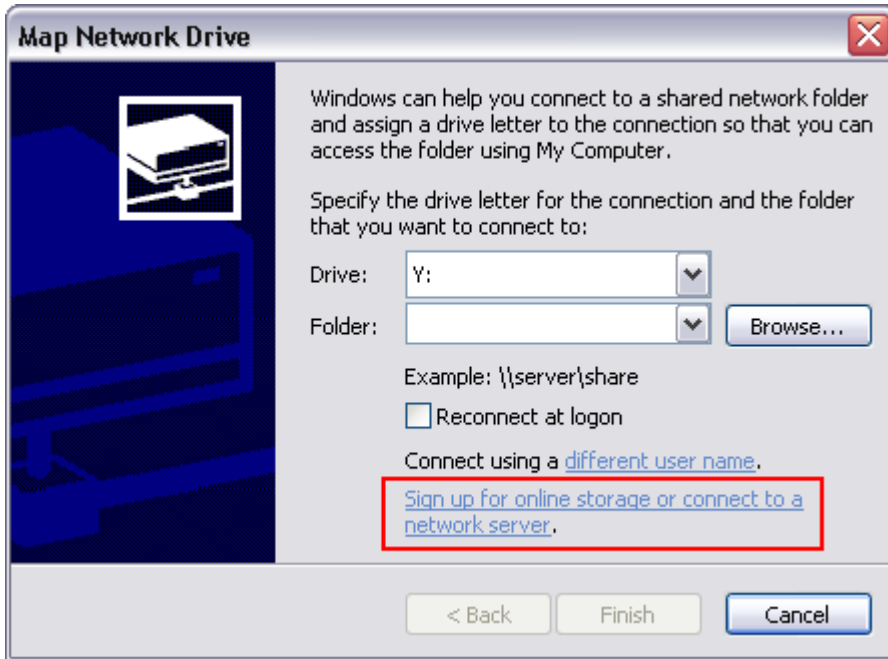
Windows Explorer will open a window showing the contents of the specified folder:



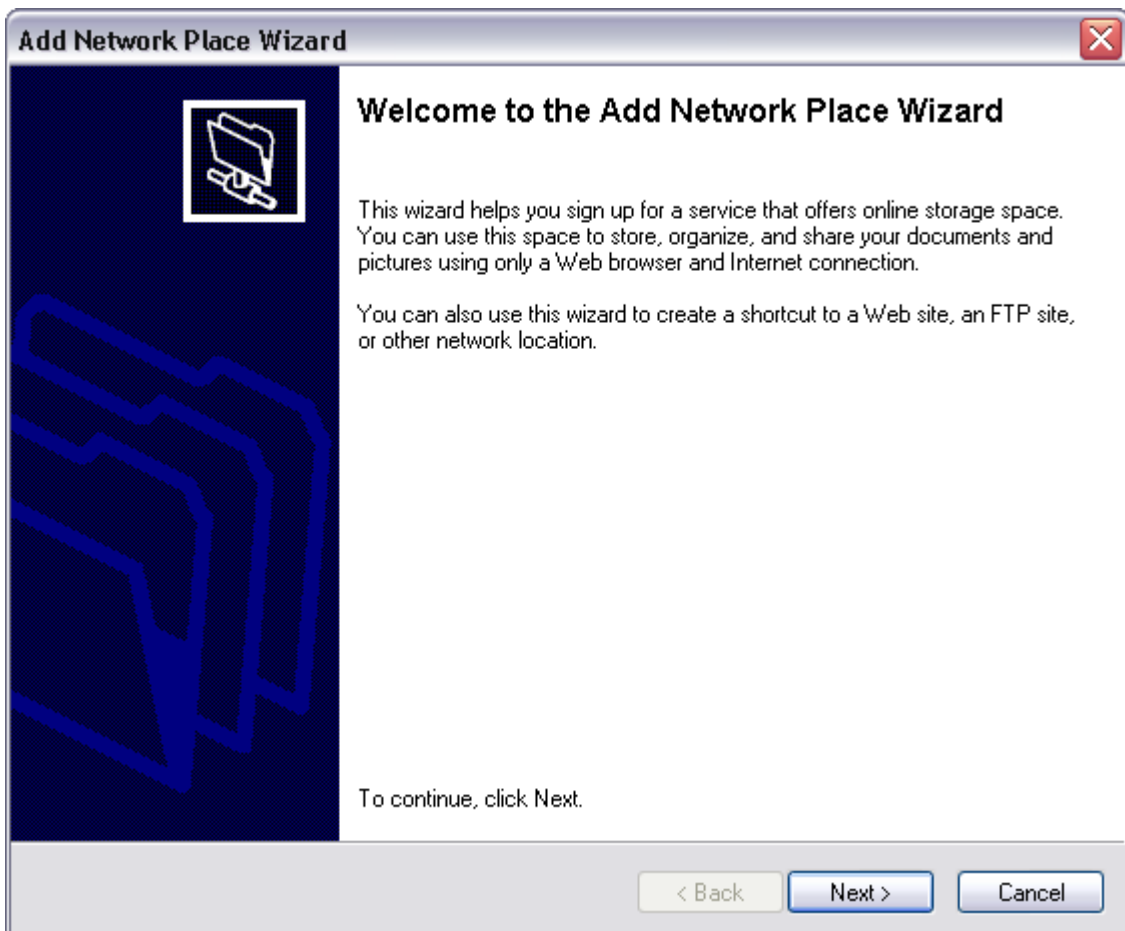
Note! This method of connection may possibly fail due to improper parameters in the Windows registry. If so, please contact your portal administrator.

Adding a Web Folder to Network Places

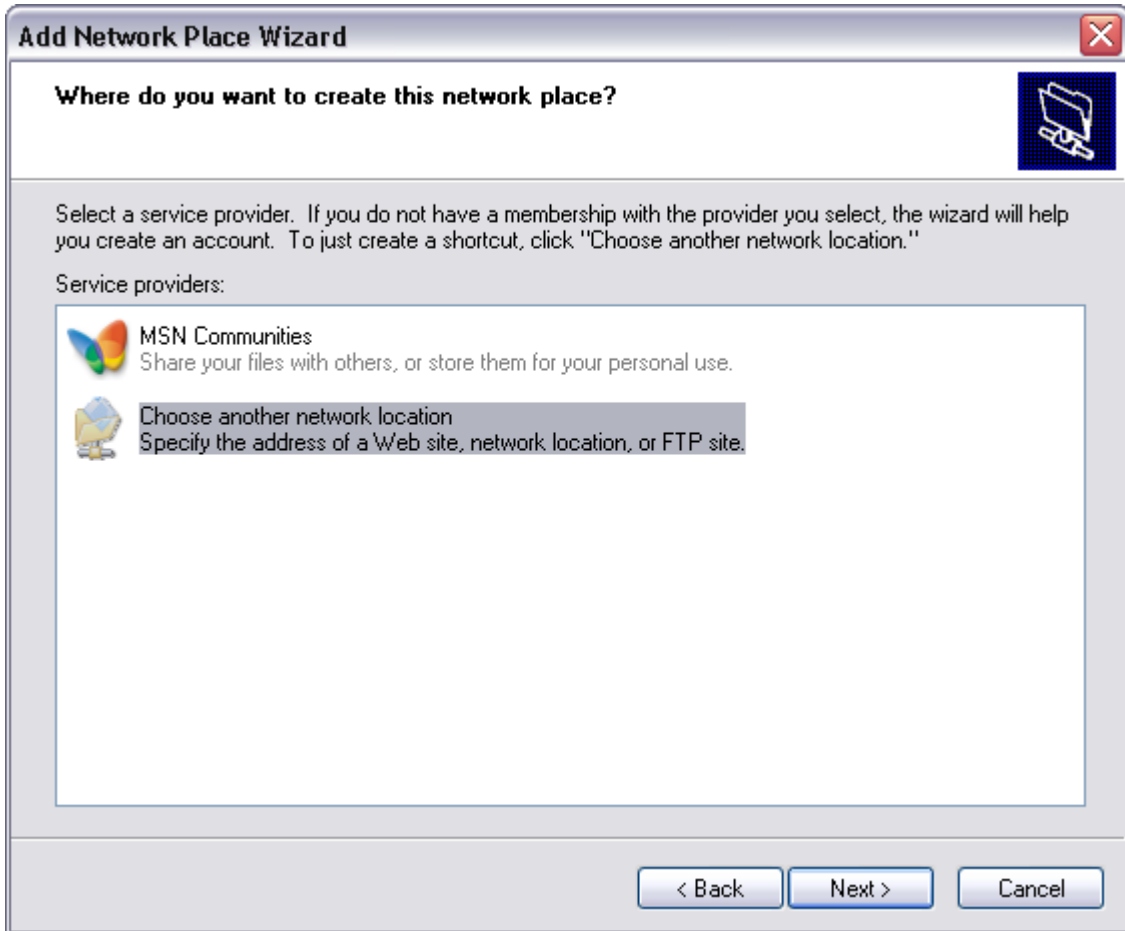
Run Windows Explorer. Select *Service -> Map Network Drive*. Click the link **Sign up for online storage or connect to a network server** to run **Add Network Place Wizard**:



The wizard window will appear:



Click **Next** here.



In this window, click **Choose another network location** and then click **Next**. The next Wizard step will open:



Add Network Place Wizard

What is the address of this network place?

Type the address of the Web site, FTP site, or network location that this shortcut will open.

Internet or network address:

[View some examples.](#)

Type the URL of the mapping folder in the **Internet or network address** field:
http://<your_server>/docs/shared/. Click **Next**.

If prompted for a **User name** and **Password**, enter your login and password, and then click **OK**.
The system will authorize you and open the next Wizard step:



Add Network Place Wizard

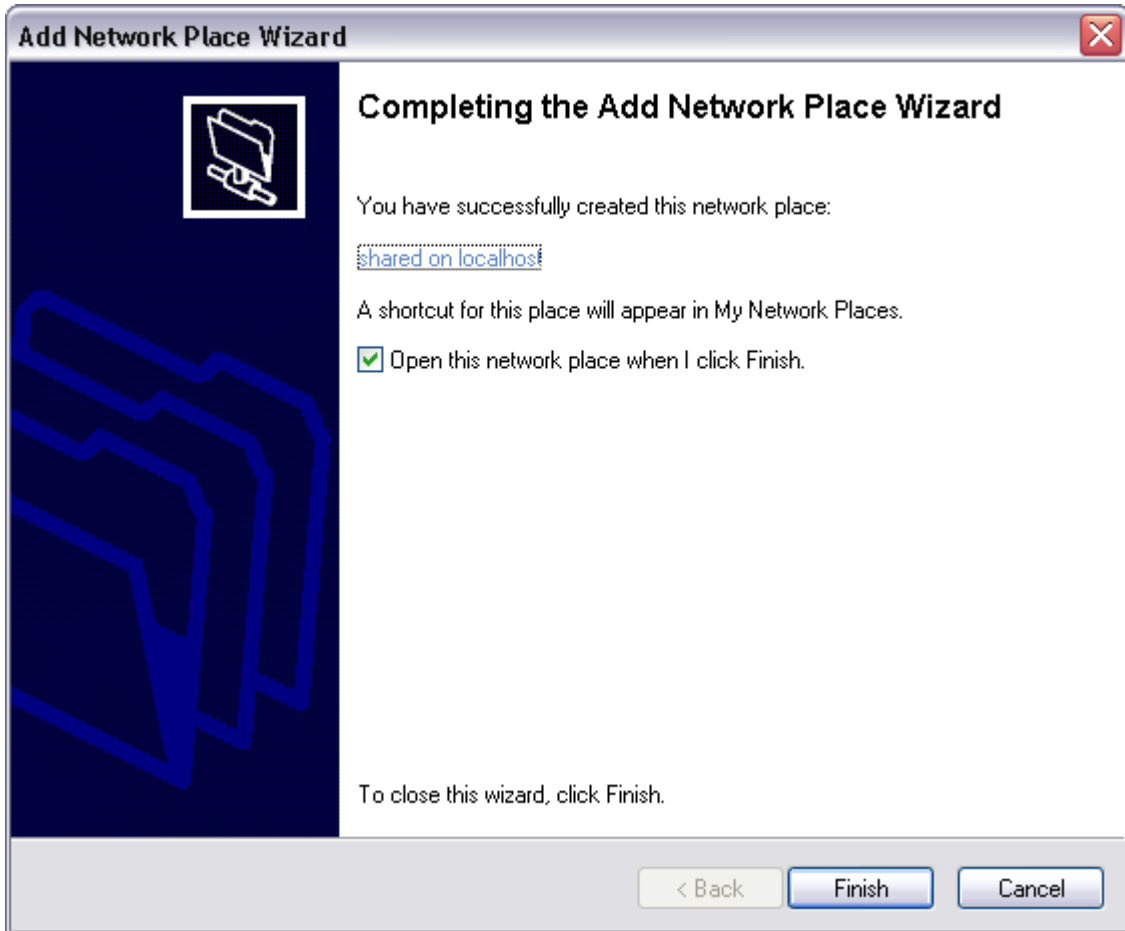
What do you want to name this place?

Create a name for this shortcut that will help you easily identify this network place:
http://localhost:6448/docs/shared/.

Type a name for this network place:
shared on localhost

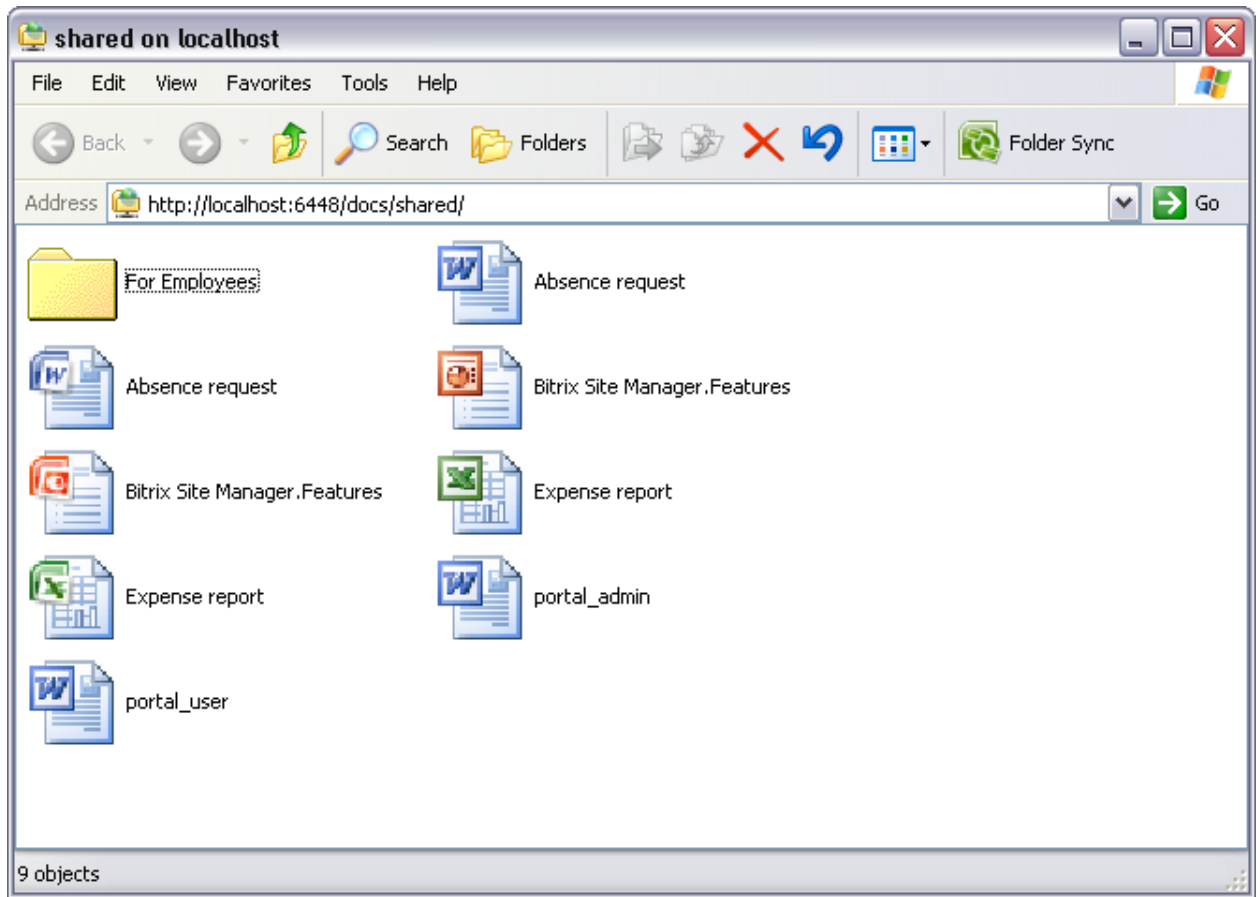
< Back Next > Cancel

In this step, you can specify an arbitrary title for the mapped folder. By default, the title is the folder name. Click **Next**. The last step will open, in which the Wizard notifies that the folder has been successfully mapped and offers an option to open the folder when you finish the Wizard.



Click **Finish** here.

The system will map the folder and, if you have chosen to open the folder, open the Windows Explorer window showing with the folder mapped:



The folder is now always available in Windows Explorer. To open it, select **Start > My Network Places > folder name**.

Mapping the Library as a Network Drive

Note! This method of connection has known limitations in Windows XP. If you have any problems, please contact your portal administrator.

Run Windows Explorer. Select **Tools > Map Network Drive**. The network disc wizard will open. In the **Drive** field, specify a letter to map the folder to. In the **Folder** field, enter the path to the library: *http://<your_server>/docs/shared/*. If you want this folder to be available when the system starts, check the **Reconnect at logon** option. Click **Ready**.

The authorization dialog will open. Enter your login and password. Click **OK**. The system will authorize you and open the mapped folder in a Windows Explorer window.

Later, you can open the folder in Windows Explorer in which the folder is shown as a drive under My Computer, or in any file manager.

Workgroups

Workgroups is a section containing information on workgroups in the company. The employees are grouped by subject, for example: **Projects, Management Board** etc. The group subjects are defined by the portal administration.

Users can create or enter a group in their personal profile.

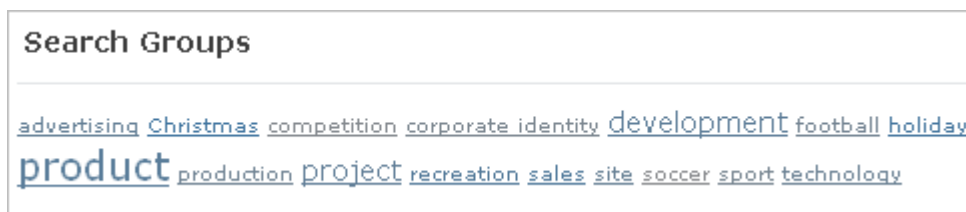
Note: not all users can create groups. If you want to create a group but do not have permission, contact the portal administrator.

Finding Groups

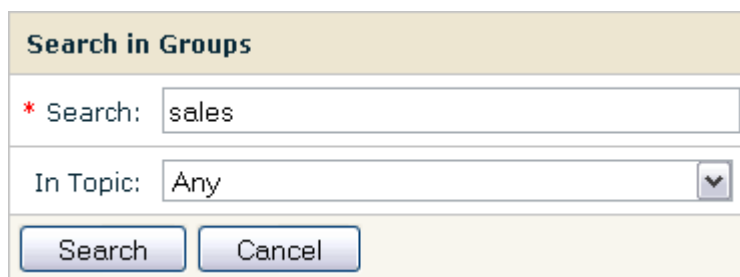
To search for a group, open to the **Search Groups** page (*Workgroups > Find Groups*).

You can search for groups in the two ways:

- using the tag cloud by clicking a tag (a keyword) to find the required groups:



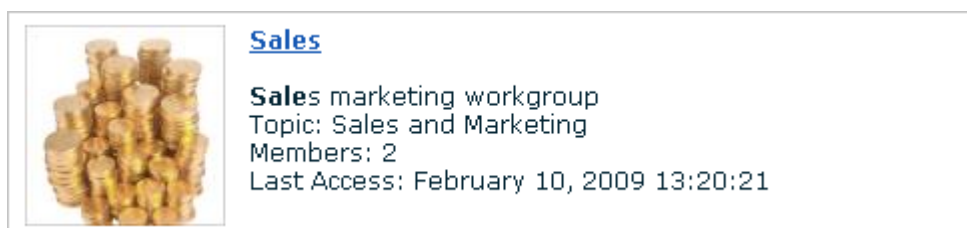
- using the search form: specify a keyword in the **Search** field and a topic in the field (optional).



The screenshot shows a form titled "Search in Groups". It has two input fields: "Search:" with the value "sales" and "In Topic:" with a dropdown menu set to "Any". Below the fields are two buttons: "Search" and "Cancel".

To start the search, click **Search**. To clear all the form parameters, click **Cancel**.

As a result, all the found profiles will display under the filter form:



The screenshot shows a search result for the "Sales" workgroup. It includes a small image of gold coins, the title "Sales", and the following details: "Sales marketing workgroup", "Topic: Sales and Marketing", "Members: 2", and "Last Access: February 10, 2009 13:20:21".

Communication

The portal offers many various features for the company members to communicate.

The **Blogs** section shows the blogs of the employees and groups. The main page of this section gives you a brief overview of all the new blogs, latest posts and user comments.

Using **Forums**, you can ask for help on a certain problem or read the existing topics of other employees. Forums are grouped in the following way:

- **General Forums** - for example, the public forum in which any user can create topics for discussion.
- **Forum for comments** - the employees can leave their comments on the company news and events here.

The published photos of employees and the pictures of workgroups are available for viewing in the **Photo Gallery** section. The gallery name follows the employee's name. If an employee allows to view their photos, the employee's personal page will open upon clicking their name.

The **Classifieds** page allows you to view advertisements of the company employees or place your own using **Classifieds** link, and further view it by clicking **My Ads**.

Forums

Creating a Topic

To create a new topic, click the **Add new topic** button. When clicked, it will open the new topic creation form:



Create new topic in: [General forum](#)

Topic Settings

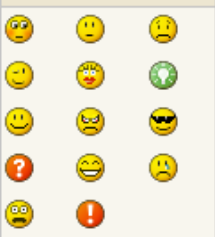
*Topic Title:


Topic Description:

Tags:

Icon: 
no icon 

Enter your Post

Clickable Smilies 

Font 

Attention! The company employees can now maintain their file storage in their private area.

You will find the detailed information about file storage management and the method of mapping the storage to a network drive in the help section: "My Profile - Files".

Should you have any questions regarding file storage configuration, please send your requests to the techsupport engineers using the support request form.

Do you want to **use** smileys in this message?

Subscribe to New Posts in This Topic

Subscribe to New Posts in This Forum

Load image for this message

Type in the topic title, description and enter the text of the first post in the new topic. If required, add some tags that would describe your topic, for easier user navigation.

If required, you can have notifications about new posts in this topic send to your e-mail. If so, check the **Subscribe to New Posts in This Topic** box.

Click **Create**. Your new topic would look like this:

Topic: «Portal News» on forum: [General forum](#) Views: 1

David Brown
Administrator
Posts: 2
Joined: February 10, 2009

Posted: February 20, 2009 10:31:12 #1 Name Quote

Attention! The company employees can now maintain their file storage in their private area.

You will find the detailed information about file storage management and the method of mapping the storage to a network drive in the help section: "My Profile - Files".

Should you have any questions regarding file storage configuration, please send your requests to the techsupport engineers using the support request form.

Profile E-Mail Message

Hide Modify Delete To support

IP: [127.0.0.1](#)
ID guest: [1](#)
ID user: [1](#)















Creating Posts





This is trivial: to add a new post, type the text in the reply form and click **Reply**:

Reply form

Enter your Post

Clickable Smilies

Font **A** **B** *I* U    

Thank you!

Do you want to **use** smileys in this message?

Subscribe to New Posts in This Topic

Subscribe to New Posts in This Forum

Load image for this message

Your post will appear at the bottom of the thread:

Topic: «Portal News» on forum: [General forum](#) Views: 5

David Brown
Administrator
Posts: 2
Joined: February 10, 2009

Posted: February 20, 2009 10:31:12 #1 Name Quote

Attention! The company employees can now maintain their file storage in their private area.

You will find the detailed information about file storage management and the method of mapping the storage to a network drive in the help section: "My Profile - Files".

Should you have any questions regarding file storage configuration, please send your requests to the techsupport engineers using the support request form.

Profile E-Mail Message ↑

Allenby
Posts: 1
Joined: February 19, 2009


Posted: February 20, 2009 10:37:02 #2 Name Quote

Thank you! ✎

Profile E-Mail Message ↑

Modify

Subscription for New Posts and Topics

Whenever you want to subscribe for new posts or topics, click  **Subscribe for:** ▼. In the drop-down list, select **New posts** or **New topics**.

If you want to manage your subscription, click  **Subscription** on the context toolbar. In the subscriptions form, click the **Delete** link of a subscription you want to deactivate:


Subscription				
Forum title	Topic title	Date Subscribed	Last sent message	Actions
General forum	All topics	February 20, 2009 10:39:38		Delete
News discussion	New topics	February 20, 2009 10:39:56		Delete


Photo gallery

If the galleries of employees or workgroups contain photos, this page shows these galleries as links with names of employees or groups. A user can view the photos only if the employees have allowed viewing their galleries.

New photos of employees and groups, if they are approved by the portal administrator, can be viewed in the **New** section:







Galleries

 [Allenby Daisy](#)

 [Administrator](#)

[View all galleries](#)


New photos Popular Most commented



[New photos](#)

If the photos are public, clicking a photo will open the user or group profile where you can view the detailed images:

[← Back to album](#) + [Upload Photos](#)




prik_tlgomois.jpg
03/05/2009
[Slide show](#) [Original](#)
[Edit](#) [Delete](#)

◀ 2 of 3 ▶

(no votes)

All photos in album:



Classifieds

To post an advertisement, open the **Classifieds** page (*Communication > Classifieds*).

Click **Classifieds** to open the creation form:

Title*	<input type="text" value="Computer Desk"/>
Valid till	<input type="text"/> Format: MM/DD/YYYY HH:MI:SS
Category*	<input type="text" value=".. Sale"/> ▼
Ad text*	<input 36"="" 39"="" and="" books"="" cd="" comes="" deep="" for="" high.="" keyboard="" length="" lockable="" shelves="" slots="" tray,="" type="text" value="Beautiful corner computer desk. Cherry look with black accents. 68 3/4" with="" x=""/>
Website	<input type="text"/>
Phone*	<input type="text" value="238-759-4586"/>
<input type="button" value="Save"/>	

Fill in the following fields:

- Type the short title for your ad.
- In the **Category** field, select a closest category to which your advertisement relates.
- Type in the advertisement text.
- Specify the contacts in the following fields: **website, phone**.

Click **Save**. The new advertisement will look similar to the following:

[Computer Desk](#)

Publish date: 03/06/2009 11:05:18

Phone: 238-759-4586

Author: David Brown

Beautiful corner computer desk. Cherry look with black accents. 68 3/4" length x 39" deep x 36" high. Comes with lockable keyboard tray, CD slots and shelves for books etc. Need quick sale, asking \$75 o.b.o. You pick up.

The **My Ads** link opens a page containing all of your advertisements.

Services


The **Services** section offers special services and useful information to employees.

- You can send requests for services on the **Submit An Order** page. First, select the request type, and then fill in the request form.
- The **Knowledge Base** page contains frequently asked questions. Here you can quickly find the answer to your question. If no answer to your question exists, sent it to the IT service.
- You can send a request to the IT service on the **Technical Support** page. There you will describe your problem, and then discuss it with an IT service specialist who will try to solve your problem.
- The **Training** section contains various training courses. Each course consists of a number of lessons; some lessons can be grouped. A course may contain the self-check tests, and the final certification tests that you can attempt to pass to try your strength and, upon successful testing, obtain a certificate. Results of your tests and certificates obtained can be viewed on the pages **Gradebook** and **My Certificates**, correspondingly.
- Polls and surveys are the means to reveal the company employees' opinions on different matters. Users can vote in any active poll on the **Polls** page showing the list of all polls and the voting history.
- Popular links are shown on the **Link Directory** page.
- You can manage your subscription for the site newsletters on the **Subscription** page. There you can select subscription rubrics and specify your e-mail.

Communicating with the IT Service

Creating Tickets

To create and send a ticket to the IT service, use the special ticket wizard. Type in the **Ticket title** and select the problem topic.

 **New Ticket Wizard**
The Wizard collects information and creates an entry with problem description for Helpdesk staff.

First step

Ticket title:

Computer problem


File access problem

Printer problem

Portal related question

Click **Next**.

The number of steps and the content of the next step depend on the problem topic you have selected. For example, if you choose to ask a question about the portal, the second step demands clarification from you:

 **New Ticket Wizard**


Second step

Portal errors

Wish list

Check the required option and click **Next**.

Then, type the detailed description of the problem:

 **New Ticket Wizard**

Third step

Error page link:

Error description:

[< Back](#) [Finish](#)

Describe the problem in detail and click **Finish**. The message preview will show:

Portal related question > Portal errors

Error page link
/company/personal/user/380/groups/create/

Error description
\"You do not have permission to create new groups...\"

If you want, you can correct your ticket in the form below:

Trouble ticket

Subject:

Message:

```
<i>Portal related question > Portal errors</i>

<b>Error page link</b>
/company/personal/user/380/groups/create/

<b>Error description</b>
"You do not have permission to create new
groups..."
```

Attach files (max - 10000 kB):


Criticality:

Category:

Close ticket:




In this form, you can attach files to the ticket; specify urgency and category. Later, you can close the ticket in this form.



Click **Save** to send the ticket. The ticket will show in the list of your tickets:

ID <input type="button" value="▲"/> <input type="button" value="▼"/>	Subject	Modified <input type="button" value="▲"/> <input type="button" value="▼"/>	Msgs.	Status
Ind. <input type="button" value="▲"/> <input type="button" value="▼"/>		Modified by		
2  [Modify]	Group creation error	02/19/2009 10:17:22 [380] (Allenby) Daisy Allenby	1	
Total: 1				

Viewing and Discussing Tickets

To view or post new comments to the existing tickets, click the link **My Tickets** on the **Technical Support** page. This will open your tickets page. This page is equipped with a special filter form enabling you to find tickets matching your search criteria.

Each ticket has an indicator. The grey  indicator stands for the resolved problems. If the last comment in your ticket was yours, the indicator is green . If the last response was from a techsupport specialist, the indicator is red .

ID  	Subject	Modified  	Msgs.	Status
Ind.  		Modified by		
2  [Modify]	Group creation error	02/19/2009 12:44:18 [1] (admin) David Brown	2	
Total: 1				

To view the replies or correct the ticket, click **Modify** in the row showing the corresponding ticket. The page with the ticket discussion will open.

Trouble ticket

Source / From: [web] [380] (Allenby) Daisy Allenby
 Created: 02/19/2009 10:17:22 [380] (Allenby) Daisy Allenby
 Modified: 02/19/2009 12:44:18 [1] (admin) David Brown
 Support level: default

Discussion

Time: 02/19/2009 10:17:22 [[Quote](#)]
From: [380] (Allenby) Daisy Allenby

Portal related question > Portal errors

Error page link
</company/personal/user/380/groups/create/>

Error description
 "You do not have permission to create new groups..."

Time: 02/19/2009 12:44:18 [[Quote](#)]
From: [1] (admin) David Brown

Daisy, this bug has already been fixed

You can add your reply using the form below. The form is similar to the one in which you amend a ticket during creation.

Company

The **Company** section contains various information about the company.

Here you can learn:

- the company background;
- the company's lines of activity.

Moreover, the company address, contacts and vacancies are listed here.

Dry facts about the company can be smoothed by the event calendar, photos and video about the company life.