

IntelliEnterprise

Quick Start Guide



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Welcome

Welcome to the adenin IntelliEnterprise QuickStart guide. This guide provides a hands-on tour of the main feature areas of IntelliEnterprise. The guide can be used to familiarize yourself with the product capabilities of IntelliEnterprise during your evaluation. This guide is primarily for system administrators, content managers and other members of your Intranet project team.

IntelliEnterprise is built on a philosophy that you shouldn't need to be a developer or highly technical to build a great intranet. In fact, non-technical business users often have the best understanding of their departmental or organizational needs. Just follow these step-by-step instructions, and you'll be building powerful Intranet sites in no time.

This guide will lead you through the most common steps required to get your intranet "off the ground." Please consult the Help Manual and online Knowledge Base for details on specific topics not covered here.

See also

- [Installation](#)
- [Get Started](#)
- [Create Departmental Portal](#)
- [Document and Content Management](#)
- [Working with Applications](#)
- [Communities](#)
- [Integrating Outside Resources](#)
- [Branding](#)
- [About](#)

Home > Welcome > Goals and Organization

Goals and Organization

Most organizations choose to set up their intranet with two main areas – a Corporate area, which is available to all users, and a Departments area, which has departmental-specific content and may include areas with restricted access. Each Department can have a mix of public and private content, which can be any combination of documents, applications and workflows, forms, collaboration tools and more. In addition, many organizations take advantage of Communities, which allow for collaboration among cross-departmental groups and projects.

In this QuickStart, we will begin in the Departmental area, creating pages that will be useful for the HR Department. Then we will move on to create a Community and set up the shared area for this group. Although we use specific examples to help you as you move through this Guide, they are meant as demonstrations of concepts, rather than specific steps required of all intranets.

See also

[Terminology](#)
[Conventions](#)

[Home](#) > [Welcome](#) > [Terminology](#)

Terminology

Throughout the QuickStart, we will be using many terms for the parts that make up your intranet.. It is a good idea to familiarize yourself with these terms, as they are used throughout all the Help files, the KnowledgeBase and by adenin Support staff.

Intranet - the **Intranet** is what you are building, it encompasses all of the pages, categories, applications, etc. that you will create.

Portal - a **Portal** is the highest level of organization within your intranet. Each of your portals is shown in a tab at the top of the intranet.

Subcategory - A **Subcategory** is a section beneath the portals. Subcategories can contain other subcategories, just like the folder structure in Windows.

Category - a general term for both **Portals** and **Subcategories**, in other words, an organizational unit within your intranet.

Topic - a Topic is any unit of content. It may be a file, a bookmark, a blog post, a wiki page or other types of content.

Community - a cross-department group that shares space on your intranet with collaborative tools. You may be familiar with this idea thanks to Yahoo Groups or MSN Groups.

User - a User is anyone who can log into your system, for example, the Administrator

Role - a Role is used to define permissions. Users can belong to one or more Roles.

Application - An Application is a way to gather, store and display information. The base of an Application is a database and a form to enter the data.

See also

[Goals and Organization](#)
[Conventions](#)

Home > Welcome > Conventions

Conventions

Instructions in this QuickStart Guide follow these conventions:

- **Control Names** such as buttons, text entry boxes or drop down lists are shown in **Bold**
- **Selection Choices** such as Radio button values or drop down list options are shown in ***Bold Italics***
- `User Input` which must be typed by the user into a text box or other control is shown in `Courier Font`

See also

[Goals and Organization](#)

[Terminology](#)

Home > Installation

Installation

Please see our Installation Guide which can be found in the Extranet. You must complete the installation before you can follow this QuickStart Guide.

See also

[Installation Guide](#) (external Link)

Home > Get Started

Get Started

Click on the desktop shortcut **adenin Production Site** to open the IntelliEnterprise login page.

The default URL of the site is <http://<<server>>/portal.asp> (e.g. <http://localhost/portal.asp>).

Login to the empty production site as an Administrator.

The default User Id for the Administrator is `admin`, the default password is also `admin`.

The screenshots throughout this QuickStart are shown with the Tyne Style. If you are having trouble following along because your portal looks different, please change to this style.

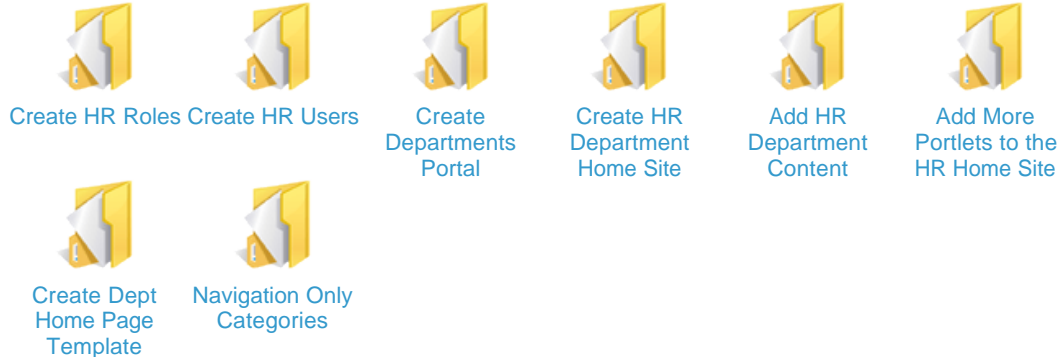
See also

- [Welcome](#)
- [Installation](#)
- [Create Departmental Portal](#)
- [Document and Content Management](#)
- [Working with Applications](#)
- [Communities](#)
- [Integrating Outside Resources](#)
- [Branding](#)
- [About](#)

Home > Create Departmental Portal

Create Departmental Portal

In this section, we will begin to fill out the Departments Portal of our intranet.



See also

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[Installation](#)
[Get Started](#)
[Document and Content Management](#)
[Working with Applications](#)
[Communities](#)
[Integrating Outside Resources](#)
[Branding](#)
[About](#)

Home > Create Departmental Portal > Create HR Roles

Create HR Roles

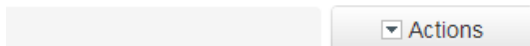
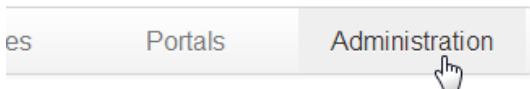
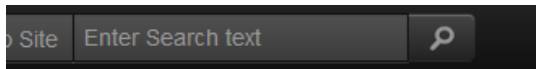
Roles are the basic units of permission within IntelliEnterprise. They control access to categories, documents, applications and workflows. Before we can continue, we need to create the Roles we will use in this section of the QuickStart.

Because we are focused on the HR Department, we will create:

- **HR Users:** this role will be assigned to all members of the Human Resources department. The members of this role will be allowed to access all internal content of the department.
- **HR Admins:** this role will be assigned to the Administrators who are responsible for the Human Resources site. These Administrators will be able to manage the structure of the HR site, manage all content, and control the membership for the **HR Users** role.


If your organization plans to use Active Directory Synchronization, you will not need to manually create Roles as they will be imported from Active Directory. However, please follow the steps here to complete the QuickStart.

1. Click on the **Administration** Portal Tab to open the Administration Portal.



2. Click on the **Roles** icon. 
[Roles](#)

3. Click on the **New** icon 

4. Enter **HR Users** as the **Description** of the new role and click on the **Save** icon 

5. Click again on **New** to create a second new role.

6. Enter **HR Admins** as the description of the new role and click on the **Save** icon.

7. Click on the **My Home** link on the top of the page to return to the home page.

Creating Roles is a very simple process because the Roles do not carry any meaning by default. Roles begin to become useful when we first assign users to the various roles and later use the Roles to apply Permissions to Categories and Applications.



See also

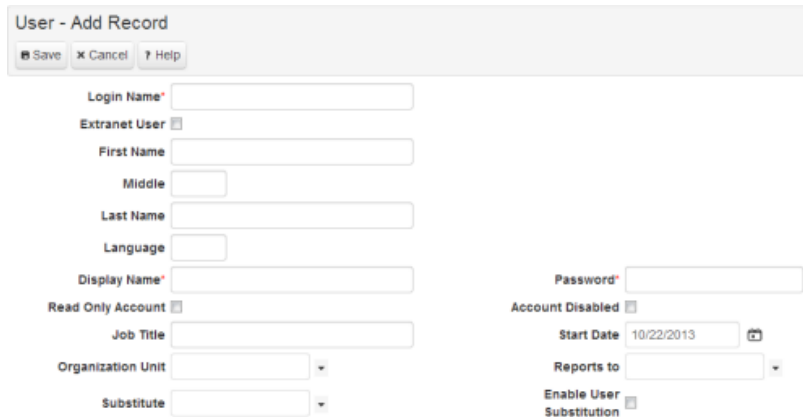
- [Create HR Users](#)
- [Create Departments Portal](#)
- [Create HR Department Home Site](#)
- [Add HR Department Content Categories](#)
- [Add More Portlets to the HR Home Site](#)
- [Create Dept Home Page Template](#)
- [Navigation Only Categories](#)

Create HR Users

Now that we have the necessary roles, we will create an HR Admin user. This user will be responsible for the management of the HR department category. We will also create an HR Worker Bee, who is a regular HR User.

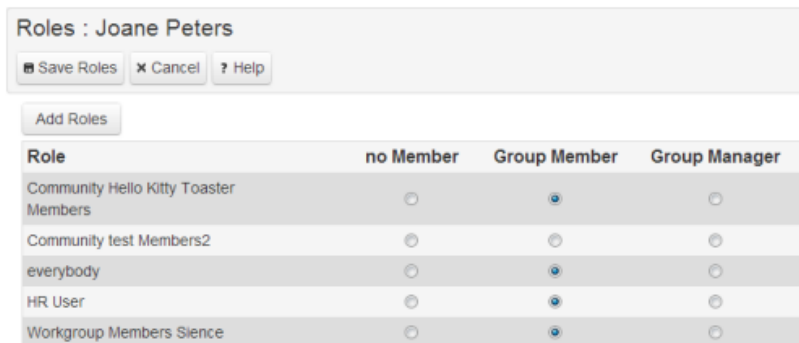
Create the HR Admin User

1. Click on the **Administration** Portal tab to open the Administration Portal.
2. Click on the **Users** icon  to open the User Maintenance page.

3. Click on the **New** icon.
4. Enter HR Admin in the **First Name** field, and HR Admin Sample Account in the **Display Name** field.



The Display Name is shown on all pages in which a reference to a user is shown. Most of the time this field is filled with Last Name, First Name.

5. Enter a password in the **Password** field and enter an email address in the **eMail Address** field.
6. All other fields on this page are optional, feel free to add data if you would like.
7. Click on **Save** to continue.
8. Click **Add Roles** to add additional Roles to this user. This user should have access to all private content of the HR Site (HR Users) and all functions only available to the Administrators of the HR site (HR Admins).



Role	no Member	Group Member	Group Manager
Community Hello Kitty Toaster Members	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Community test Members2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
everybody	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
HR User	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Workgroup Members Sience	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Every new user is a member of the Everybody role by default.

9. Select the **HR Admins** and **HR Users** on the Add Roles page and click on the **Save** icon.
10. You should now see the updated Roles list. Change the **Role Membership** from **Group Member** to **Group Manager** for the **HR Users** role and click on **Save** to continue.

A Group Manager may manage which other users belong to this role. In this sample, switching the type to Group

Manager means that the HR Admin account may grant and revoke access to the HR Users role.

Create the HR User

1. You should still be in the User application. Click the **New** icon.
2. Enter `HR User` in the **First Name** field, and `HR Worker Bee` in the **Display Name** field.
3. Enter a password in the **Password** field and enter an email address in the **eMail Address** field.
4. All other fields on this page are optional, feel free to add data if you would like.
5. Click on **Save** to continue.
6. Click **Add Roles** to add additional Roles to this user. This user should have access to all private content of the HR Site (HR Users).
7. Select **HR Users** on the Add Roles page and click on the **Save** icon.
8. You should now see the updated Roles list. Click on **Save** to continue.
9. Click **My Home** to return to the main page.

See also

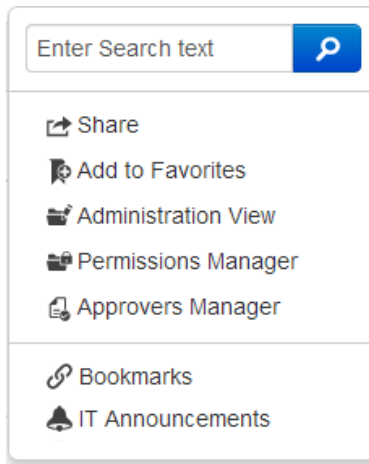
[Create HR Roles](#)
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Home > Create Departmental Portal > Create Departments Portal

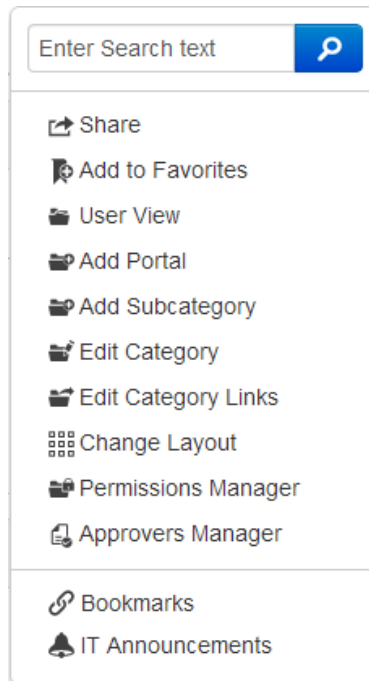
Create Departments Portal

Now we will create a Departments Portal, which would ultimately contain subcategories for each department. A Portal is the category directly under the root folder, and will therefore be shown as a tab in the navigation bar. For the purpose of our QuickStart, we will focus only on the HR Department.

1. Click on the **Actions** menu on the top right area of the My Home page to show the page actions menu.
2. Enable Administration mode by clicking on the **Administration View** action link.



Enabling Administration mode will display additional Administrative actions on the Actions menu as well as on the Portlets.



3. Click on the **Actions** menu again.
4. Select **Add Portal**.
5. Enter `Departments` as the **Page Title** and select **Basic Page** in the **Create from Template** field.
6. Check **Site Home Page**.

7. Click on the Security tab.
8. Click on the **Add Roles** link to set the permissions for this new category.
9. Check the **Everybody** and **Administrators** roles and click on the **Save** icon The Security page is updated to display the selected roles.
10. Change the permission for the **Administrators** role from **Read** to **Administrator**. Now Everybody may access/read this page and the members of the Administration role may also update/modify this page.
11. Click **Save & Exit**

Type	Role	Shortcut	no Access	Read	Editor	Administrator
Role	Administrators	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Role	everybody	<input type="checkbox"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

See also

- [Create HR Roles](#)
- [Create HR Users](#)
- [Create HR Department Home Site](#)
- [Add HR Department Content Categories](#)
- [Add More Portlets to the HR Home Site](#)
- [Create Dept Home Page Template](#)
- [Navigation Only Categories](#)

Home > Create Departmental Portal > Create HR Department Home Site

Create HR Department Home Site

Now we will create the HR Department Home Site within the Departments Portal. You should start from the Departments Portal Page before following the next instructions. Global administration tasks, such as creating Roles and Users, take place in the Administration Portal. Tasks related to Categories and Content are done in context, usually using options from the Actions menu on the page.

1. Open the **Actions** menu
2. Click on the **Add subcategory** action to create a new category below the Departments Portal.
3. Enter *Human Resources* as the **Page Title** and select **Content Page** in the **Create from Template** field.
4. Check **Site Home Page** to make this page the home page of the new Human Resources site.

When you choose to create a page from a template, it allows you to start with a preselected set of portlets. The Production site comes with a number of Templates. You can create your own Templates in the Administration Portal.

5. Click on the Security tab to define the access permission for the new page.

The permissions of the parent category (Departments) are applied to the new page by default.

6. Click on **Add Roles** to select additional access roles.
7. Select the **HR Admins** and **HR Users** roles and click on **Save**.
8. Change the permission for the **HR Admins** role from **Read** to **Editor**.

Users with Editor permissions are allowed to publish and update content within the category.

9. Click on the Category Icon tab. All available category icons are shown.

Category icons are used to visually identify categories as a user navigates throughout the intranet.

10. Select the icon that shows two people in conversation.
11. Click on the **Save and exit**.

See also

- [Create HR Roles](#)
- [Create HR Users](#)
- [Create Departments Portal](#)
- [Add HR Department Content Categories](#)
- [Add More Portlets to the HR Home Site](#)
- [Create Dept Home Page Template](#)
- [Navigation Only Categories](#)

Home > Create Departmental Portal > Add HR Department Content Categories

Add HR Department Content Categories

We will add two content categories to the HR Department. The Policies category will hold policy documents that we want to make available to all employees. The Policy Drafts category will hold private documents that are meant to be visible only to HR users.

1. You should be on the HR Department Home Page. Select the **Actions** menu and choose **Add subcategory**
2. Enter `Policies` in the **Page Title** field. Select **Document Management Page** in the **Create from Template** field.
3. We do not need to change the Security settings, they have been inherited from the HR Department Home Site. Click **Save and exit** to create the new category.
4. Return to the HR Departments Home Page. Select the **Actions** menu and choose **Add subcategory**
5. Enter `Policy Drafts` in the **Page Title** field and select **Document Management Page** in the **Create from Template** field.
6. Click on the Security tab.
7. Since we want this category to be private for HR Users. Change the permission for the **Everybody** role from **Read** to **no Access**.
8. Click on **Save and exit** to continue.
9. Now go to the HR Home page and select **Actions > Permissions Manager**.

Departments : Human Resources Help Exit

Category	Administrators	Everybody	HR Admin	HR User	Sales Emp. / Demo Account	Add Roles	Add Users	Show Change History
Departments	Ad	Rd	⚠	⚠	Rd	⊕	👤	📄
Human Resources	Ad	Rd	Ed	Rd		⊕	👤	📄
Policies	Ad	Rd	Ed	Rd		⊕	👤	📄
Policy Drafts	Ad		Ed	Rd		⊕	👤	📄

	no Access
Rd	Read
Ed	Editor
Ad	Administrator
⚠	Inconsistent Permissions

The Permissions Manager gives you a visual representation of the permissions for the current category and the child categories. Users and Roles are shown to have Administrator, Edit, Read-only or no Access. You may also see the Inconsistent Permissions Icon. This appears when a role or user is given Read (or better) privileges for a child category, but not the parent. For example, if a user has Read access to Policies but not the HR Home Page, they would never be able to Navigate to the Policies page because their access to the HR home page is blocked.

1. Click on the Inconsistent Permissions icon in the **HR Users** square and add **Read** access. Technically, this is not necessary, as all HR Users are also members of the Everybody role, so they will have Read Access to the page, but it is best to maintain consistent permissions throughout the site.
2. Click on **Exit** to close the Permission Manager.

See also

[Create HR Roles](#)
[Create HR Users](#)
[Create Departments Portal](#)
[Create HR Department Home Site](#)
[Add More Portlets to the HR Home Site](#)
[Create Dept Home Page Template](#)
[Navigation Only Categories](#)

Home > Create Departmental Portal > Add More Portlets to the HR Home Site

Add More Portlets to the HR Home Site


The HR Home site is the gateway to the whole HR Department area, we should add some additional portlets that will be useful for our users. The News portlet displays the most recently updated topics in a category. For the HR site, this can be a good way to alert users to new policies or updated forms. The Calendar portlet displays upcoming events and deadlines.

1. Navigate to the HR Home Site
2. Select **Actions > Administration View**
3. Scroll to top of the column where the portlets are to be displayed
4. Click **Add Portlets**

Since we have used Templates so far, this is the first time you have seen the portlet catalog. The portlet catalog lists all the available portlets, sorted into categories, and allows you to add them to the current category page.

1. Click on **Content Portlets**
2. Check the **News** portlet to have it added to the category
3. Now go to **Collaboration Portlets**
4. Click on **Select Portlet...** to add the **Shared Calendar** and all other ticked portlets (which is only the Content Portlet) to the category. The portlet catalog is saving your changes and closes afterwards.
5. Now move the portlets so the Shared Calendar is to be found in the narrow and the Content Portlet in the wide column of the page.

You will see that the News portlet's standard configuration pulls the most recent documents from the HR Department category and all subcategories so we do not need to further configure this. The Calendar portlet is not yet configured. First, we will need to create the Shared HR Calendar, then we will edit the portlet to display this data.

1. Go to the Administration portal
2. Click the Public Calendars icon 
Public Calendars
3. Click the New icon
4. Enter `Human Resources Important Dates` as the **Title** and click the Save icon.
5. Click **Add Roles**
6. Check **Administrators**, **Everybody**, **HR Admins** and **HR Users** then click the Save icon
7. Set **Everybody** to have **View** access, set **HR Users** to have **Edit** access, then give **Administrator** access to **Administrators** and **HR Admins**.
8. Click the Save icon.
9. Click **My Home** to return to the intranet front page.
10. Navigate to the HR department Home Site.
11. Click the Edit Properties icon for the Shared Calendar portlet.
12. You will see a list of available calendars with check boxes (at this point, the only options should be **All Calendars** and **Calendar: Human Resources Important Dates**). Check the box next to **Human Resources Important Dates**.
13. Click **Save & Exit**.

You can now add important public dates, such as benefits enrollment deadlines or review periods to this public calendar.

See also

[Create HR Roles](#)
[Create HR Users](#)
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[Navigation Only Categories](#)

Home > Create Departmental Portal > Create Dept Home Page Template

Create Dept Home Page Template

Most Departments in your organization will have unique needs and therefore require their Departmental areas to consist of a unique set of Category Pages and Portlets. However, they may share some common base features or you may want to ensure that all Departmental Home Sites are identical. In either case, using a Portal Page Template can make things easier.

You have already been working with Portal Page Templates, such as the Basic Page or Document Management Page, while creating the HR area. These Templates came installed with the software, now you will create your own.

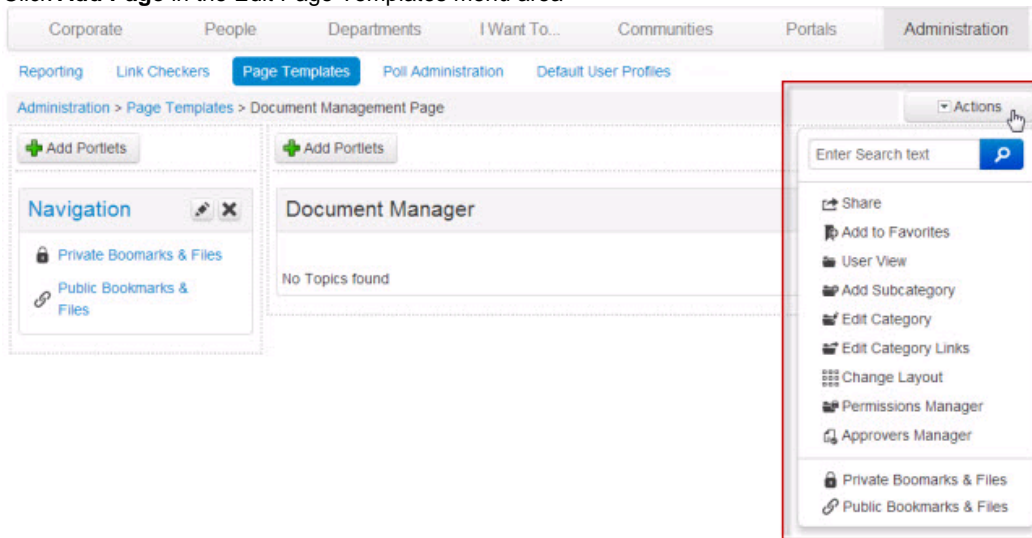
Create Departmental Home Page Template

1. Navigate to the Administration Portal
2. Open the Portal Page Templates section



Portal Page Templates

3. Click **Add Page** in the Edit Page Templates menu area



4. Enter Dept Home Page for the **Page Name**
5. Select the default 2 Columns layout
6. Click **Select Portlet Category**
7. We're going to make this Template a little different from the HR Departmental Home Page. In fact, by now you should feel comfortable adding and configuring portlets, so feel free to select your own choice of portlets and skip to Using the Template.
8. Select the **Content Portlets** category
9. Add a **Navigation** and a **Search** portlet to the left column
10. Add a **Topic Portlet**, a **News** portlet and a **Top Topics** portlet to the right column.
11. Click **Save**
12. You should now see the page laid out with the portlets you selected, with one difference. The Edit Page Templates menu will appear in the top of the left column. This will not appear when you use the Template.
13. Edit the Top Topics portlet properties
14. Change **Select Categories** to **Current Site**. This will automatically customize the portlet to pull the most popular Topics from only the current Site each time you use the Template.
15. Click **Save & Exit**.

Using the Template

1. Navigate to the Departments Portal

2. Select Actions > Add subcategory
3. Enter Marketing Department as the Page Title
4. The **Dept Home Page** template should now be available in the **Create From Template** list. Select it.
5. Check **Site Home Page** do define a new Site for the Marketing Department. This setting will ensure that the News and Top Topics portlets in the Template are pointing to the right area.
6. Although in a real-world scenario, we would also want to define Security and Category Icon settings for each Department, we will skip that here. Click **Save & Exit**
7. The Marketing Home Page will now be pre-populated with your Template.

You can now add or remove portlets, just as we did with the built-in templates.

See also

- [Create HR Roles](#)
- [Create HR Users](#)
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Home > Create Departmental Portal > Navigation Only Categories

Navigation Only Categories

Navigation Only categories allow you to create a category that is only a "pass-through." For example, we don't have any content on the Departments Portal Page and we don't really need any, but it's still important that the Departments Portal exists for organization and navigation purposes. So, we are going to make the Departments Portal a Navigation Only Category. This means that whenever a user clicks on the Departments Portal, they will be immediately passed through to the first department's Home Site (right now, that's HR).

1. Go to the Administration Portal
2. Open the Content Inventory section



Content
Inventory

3. Browse or Filter to find the Departments Category

Categories - Active Categories					
<input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="View"/> <input type="button" value="Permissions"/> <input type="button" value="Delete"/> <input type="button" value="Group"/> <input type="button" value="Views..."/> <input type="button" value="Export"/> <input type="button" value="AppDesigner"/> <input type="button" value="Exit"/> <input type="button" value="Help"/>					
Cat ID	Caption	Last Access	Last Update	Contact	Page Name
1004279	Departments		5/19/2011		

4. Double-click to open the record.
5. Click the Edit Icon
6. Check the box **Navigation Only Category**
7. Click Save
8. Now, test this by clicking on the Departments Portal in the top navigation. You should jump directly to the HR Department Home Site.

The Administration Portal's Content Categories interface allows Administrators a back door to various Category properties.

This should not be used for general category maintenance, instead Administrators should use Edit Categories from the Action Menu.

See also

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[Create Dept Home Page Template](#)

Home > Document and Content Management

Document and Content Management

So far, we have done tasks related to creating the organization and structure of our intranet. Now we will move on to populating the HR Department with content. IntelliEnterprise offers a number of both basic and advanced features for even greater control over how and when documents are available on the intranet.



[Add Departmental Content](#)



[Basic Document Approval](#)



[Advanced Document Approval](#)



[Document Lifecycle](#)



[Topic Properties \(Metadata\)](#)



[Make Your Documents Easier to Find](#)

See also

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Home > Document and Content Management > Add Departmental Content

Add Departmental Content

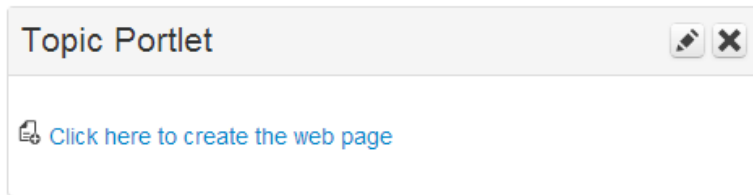
Now we will add content to our HR department pages. The HR Department home page will act as a sort of "gateway" for both HR and general users to see basic information and find their way to the additional information in the subcategories. Each subcategory will be set up for simple document publishing and management.

The HR Home site

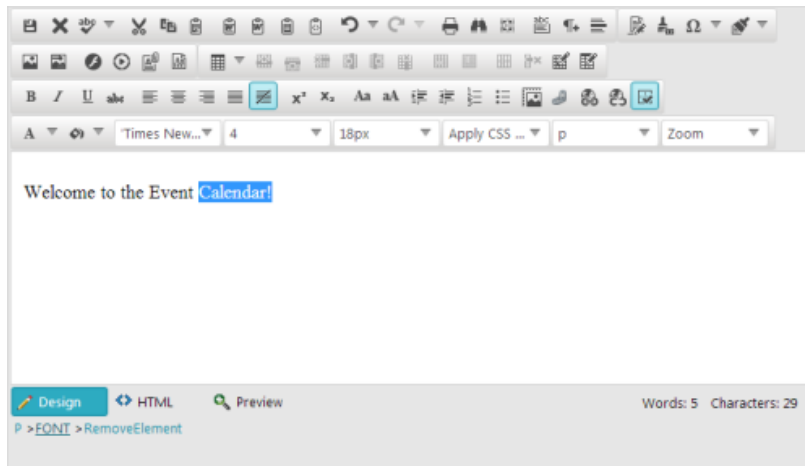
Because we selected the Content Page Template when we created the HR Home Site, it will already have a Navigation portlet and a Topic Portlet.



The Navigation Portlet should display links to the Policies and Policy Drafts categories. We do not need to edit this any further.



1. Click the link inside the Topic Portlet that reads **Click here to create the web page**. This will open the WYSIWYG HTML Editor. As you can see, this looks and acts very much like Word.




A Topic Portlet is usually used to display a welcome message or important announcements.

1. Type in your own welcome message and format it as you like.
2. Click the Save icon.
3. You should now see the welcome message displayed, but the Caption of the Portlet still reads "Topic Portlet" which is not very helpful to the users. Click the Edit Properties icon for the Topic Portlet.

4. Enter `Welcome` as the **Topic Caption**.
5. Click **Save and Exit**.

The Policies (public) Category

Because we selected the Document Management template when we created the Policies category, it already contains a Navigation portlet and a Topic List portlet.

1. Navigate to the Policies category
2. Click the Publish icon in the Topic List portlet 
3. Select **File** as the **Type**.
4. Enter `My First Policy` as the **Title** and add some descriptive text for the **Abstract**
5. Click **OK** to continue.
6. Click the **Browse** button and select a file from your local file system to upload to the portal.
7. Click **Next** to continue.
8. Click **OK**.

You can continue to publish additional topics to get familiar with the different built in Topic Types.

The Policy Drafts (private) Category

1. Navigate to the Policy Drafts category
2. Repeat the steps you followed in the Policies category to publish new topics.

See also

[Basic Document Approval](#)
[Advanced Document Approval Workflow](#)
[Document Lifecycle](#)
[Topic Properties \(Metadata\)](#)
[Make Your Documents Easier to Find](#)


Home > Document and Content Management > Basic Document Approval

Basic Document Approval

IntelliEnterprise comes with a simple, built in document approval workflow. This workflow requires a category Administrator to approve any newly posted documents before they become public. We will add this process to the Policies page.

1. Navigate to the Policies category
2. Select **Actions > Edit category**
3. Click on the Security tab
4. Click the check box next to **Requires approval**
5. Click **Save and exit**

Test the Document Approval Workflow

1. Log out of the Admin account
2. Log in as the HR Admin.
3. Navigate to the Policies category. Publish a new topic.
4. Because you are the author, you will be able to see the document now.
5. Log out and log in as the HR Worker Bee.
6. Navigate to the Policies category. Note that you do not see the new topic just published by HR Admin.
7. Log out and log in as Admin.
8. Navigate to the Policies category.
9. Because you are now a category admin, you will be able to see the new document.
10. Click the Approve icon for the new topic.  **Approve** You will be brought to the Topic Properties page.

Employee Handbook

This is the Employee Handbook.

Last Modified:	Joane Peters , 10 minutes ago
Publisher:	Joane Peters , 1 hour 14 minutes ago
Tags:	employee handbook , policy Add/Edit Tags...
Language:	en Edit...
Views (Today):	1 (0)
History:	Revised 2 times
Workflow State:	Approved
Expiration:	none
Download link:	http://demo.adenin.com/demo.aspx?bo=b6portal.wo&fn=top&d=1&t=1022631

11. The "Workflow State" in the bottom of the page should now read "Approved". Alternatively you can always approve a document from the Topic properties page, by selecting "Approve" from the Actions menu.
12. Log out and log in as HR Worker Bee.
13. Navigate to the Policies category. You will now be able to see the new, approved document.
14. Log out and log in as Admin.

See also

[Add Departmental Content](#)
[Advanced Document Approval Workflow](#)
[Document Lifecycle](#)
[Topic Properties \(Metadata\)](#)
[Make Your Documents Easier to Find](#)

Home > Document and Content Management > Advanced Document Approval Workflow

Advanced Document Approval Workflow

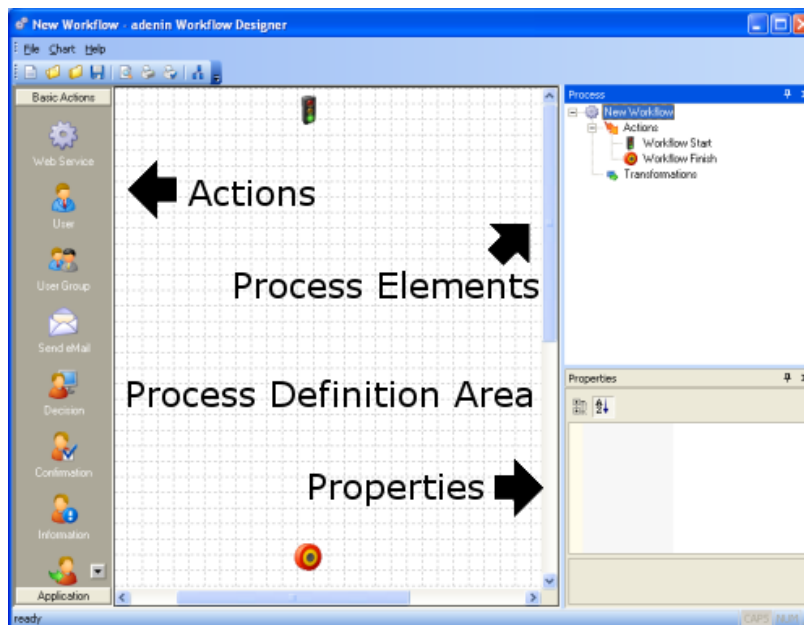
Though IntelliEnterprise comes with the simple workflow we just learned about, you may want to use a more complex approval workflow within your organization. For example, you may want to have the category administrator approve a document and then also ask for approval from HR or Compliance before it goes live.

For this example, we will create a workflow that allows an HR Admin to Accept a document or Reject it and send a note back to the author.

To create a Workflow, we will need to use the Workflow Designer, which is a separate application that comes installed with the intranet.

1. Go to your Windows Desktop, click on **Start > All Programs > adenin > Workflow Designer**
2. Log in using your Admin account credentials.
3. The default **Server URL** of the site is `http://<<server>>` (e.g. `http://localhost/`).
4. Enter `1` as the Company Id of the production site.
5. Click **Ok**.
6. Click on the New icon in the toolbar. A new Workflow Process is created.

The left side of the Workflow Designer shows the available actions. The central area is where you create the Workflow definition. The top right area shows the elements of the Process (actions and transformations). The bottom right area shows the Properties for the current action or transformation.



7. Click on the Start Node (traffic light icon).
8. When you click on any node/action in a workflow, the action Properties will be displayed in the bottom right window.
9. Under the Start Node Properties, enter `HR Document Approval` as the **Caption**.
10. Select **Topic Approval** in the **BO** field.

BO stands for Business Object: in other words, what type of workflow this is. IntelliEnterprise supports various types of Workflows.

11. Drag and drop a **User Group** action into the process definition space.
12. Enter `Assign to HR Admins` as the **Caption**.
13. Set **Group Id** to `HR Admins`. This action now assigns new topics to the HR Admins role. Any member of the role

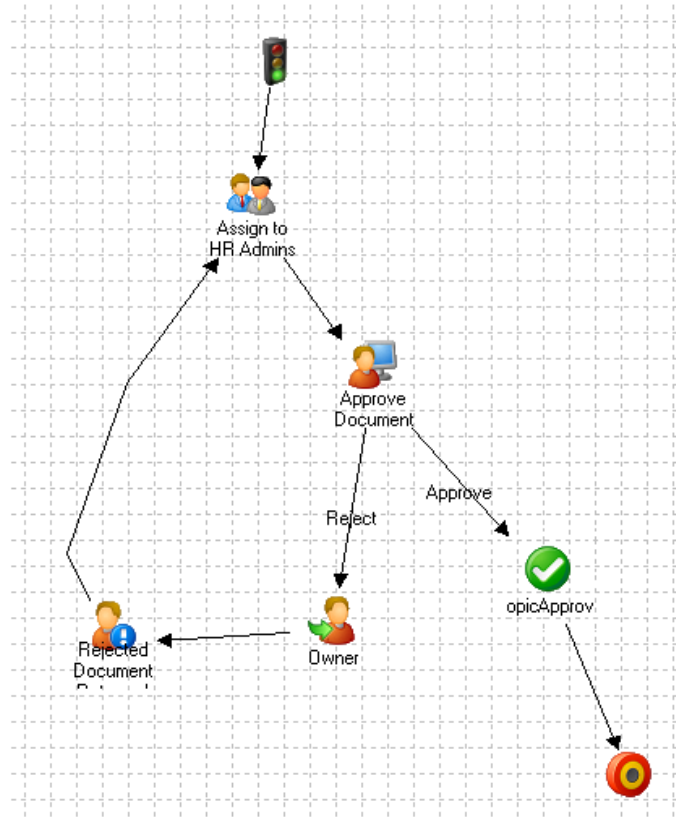
can then take on the task and complete it.

14. Drag and drop a **Decision** action into the process.
15. Enter `Approve Document` as the **Caption**. This will require the assigned user to make a decision before the workflow can continue. We will define the decision choices later.
16. Now let's add the rejection path actions.
17. Add a **Transfer to Owner** action to the process. This will reassign the workflow to the original author.
18. Add an **Information** action to the process.
19. Enter `Rejected Document Returned` as the **Caption**.
20. We will use the **Description** field to include a longer message. Click on the ... button to open a larger text editing area.
21. Enter a **Description** such as `Your document has been rejected by the HR Admin, please make edits and resubmit.`
22. Now we will add the approval path actions.
23. Add an **Approve** action to the process. This will approve the topic.

Now we will add the transformations that define the order of the actions in our workflow.

1. Begin at the Start node. Click the node to activate it, then hover with your mouse near the center so you see a crosshairs.
2. Press down to start drawing the arrow.
3. Drag the arrow to the User Group (**Assign to HR Admins**) action and release the mouse button to finish drawing the transformation.
4. Use this same method to draw the following transformations:
 1. Assign to HR Admins > Approve Document
 2. Approve Document > Transfer to Owner
 3. Transfer to Owner > Information
 4. Information > Assign to HR Admins
 5. Approve Document > Approve
 6. Approve > Target icon (End Node)
5. Now click on the transformation between the Approve Document and the Transfer to Owner actions. This transformation will be the Reject option for the Approve Document Decision.
6. Enter `Reject` as the **Caption**.
7. Click the transformation between Approve Document and Approve.
8. Enter `Approve` as the **Caption**.

Now, the HR Admin who owns the task at the decision point will be given the options **Reject** and **Approve**.



Once you have created the workflow, you can exit the Workflow Designer. All work you do in the Workflow is saved automatically as you work.

The last step in creating a Workflow is to attach the Workflow to a document category.

1. Return to the intranet and navigate to the Policies category.
2. Select **Actions > Edit Category**
3. Click on the Security tab
4. Change the **Workflow** from *Built-in* to *HR Document Approval*.
5. Click **Save and Exit**.

Now, all documents published in the Policies category will go through the HR Document Approval Workflow.

See also

- [Add Departmental Content](#)
- [Basic Document Approval](#)
- [Document Lifecycle](#)
- [Topic Properties \(Metadata\)](#)
- [Make Your Documents Easier to Find](#)

Workflow Portlets

To get the most out of your advanced workflow, you should add some additional portlets to alert users when they need to take action in a Workflow.

Because Workflow tasks and notifications will eventually include departments other than HR, we will not add these portlets to the HR category. Instead, we will add them to the home page.

1. Click on **My Home** to navigate to the home page.
2. Select **Actions > Select Portlets**
3. Click **Personal Portlets**
4. Add the **My Workflow Tasks** portlet to the wide part of the page.
5. Add the **My Workflows** portlet to the wide part of the page.
6. Click **Save**.

The My Workflow Tasks portlet displays workflow tasks currently assigned to you or to one of your roles. The My Workflows portlet allows you to follow the progress of a workflow you have started (for example, by publishing a new Policies document) by showing you the current status and current assigned user.



See also

[Test the Workflow](#)

Test the Workflow

1. Navigate to the Policies page and publish a new document.
2. Navigate to **My Home**. The new workflow will appear in the My Workflows portlet. (It may take a few seconds for the workflow to begin processing and appear in the portlet.)

My Workflow Tasks				
Task Id	Type	State	Caption	Due Date ▾
1000003	HR Document Approval	Assign to HR Admins	New policy for workflow	7/14/2013 2:20:47 AM

My Workflows						
Task Id	Type	State	Caption	Started	Current User	Due Date
1000003	HR Document Approval	Assign to HR Admins	New policy for workflow	7/2/2013 5:52:55 PM	Administrator	7/2/2013 5:52:57 PM
1000003	HR Document Approval	Assign to HR Admins	New policy for workflows	7/2/2013 5:52:55 PM	HR Admin Sample Account	7/2/2013 5:52:57 PM

3. Log out of the Admin account and log in as the HR Admin.
4. As HR Admin, you will see a new item in the My Workflow Tasks portlet.

My Workflow Tasks				
Task Id	Type	State	Caption	Due Date ▾
1000003	HR Document Approval	Assign to HR Admins	New policy for workflow	7/14/2013 2:20:47 AM

My Workflows
No open tasks.

5. Click on the **Task ID** to open the task.
6. Click **Take Task** to accept this task. Now the task is assigned to you and no longer available to other members of the HR Admins role.

Task 1000003

Take Task Cancel

✓ ↻

Workflow Id HR Document Approval (1000001)

Caption New policy for workflow

Detail URL <demo.aspx?bo=b6dm3.b6udm&tr=1000114&tbAction=view&dtCoursesId=1000009>

Assigned to Administrator

- Return to My Home. You should still see the task in the My Workflow Tasks, but it will be in a new state - Approve Document.

My Workflow Tasks



Task Id	Type	State	Caption	Due Date
1000003	HR Document Approval	Assign to HR Admins	New policy for workflow	7/14/2013 2:20:47 AM

My Workflows

No open tasks.

- Click on the **Task ID** to continue.
- You now have the option to select **Reject** or **Approve**. Choose **Approve**.

Task 1000003
Update Task Cancel

Workflow Id HR Document Approval (1000001) **Task Id** 1000003

Caption New policy for workflow **State** Decision

Detail URL [demo.aspx?bo=b6Portal.wo&fn=topedit&c=1025207&t=1050101](#)

Assigned to HR Admin Sample Account

Last Comment task taken **My Comment**

Decision* Approve Reject

History

Show all entries

Date	User Name	Comment
7/2/2013 5:52:57 PM	Administrator	started
7/2/2013 6:07:25 PM	HR Admin Sample Account	task taken

- Navigate to the Policies page and you will see that the topic has been published and approved.

You can use the HR Admin and Admin user roles to test what happens when you Reject a document.

See also

[Workflow Portlets](#)

Home > Document and Content Management > Document Lifecycle

Document Lifecycle

In addition to simple and advanced document approval processes, you have control over the publishing lifecycle of all documents on your intranet. In this section, we will set up a weekly HR Newsletter category. Only the past 4 newsletters should be available. All older newsletters should be automatically archived. Please login as an Administrator.

1. Navigate to the HR Department Home Site
2. Select **Actions > Add subcategory**
3. Enter `HR Newsletter` as the **Page Title**
4. Click **Save and Exit**.
5. Because we did not select an option for **Create from Template**, we will need to design all parts of the page.
6. Select **2 Column** with a wide area on the left.
7. Click **Select Portlet Category**.
8. Click **Content Portlets**.
9. Add a **Blog** portlet to the wide area by clicking on the blue (plus) icon.
10. Add a **Navigation** portlet to the narrow area by clicking on the red (plus) icon.
11. Click **Save**.
12. From the HR Newsletter page, select **Actions > Add subcategory**.
13. Enter `HR Newsletter Archive` as the **Page Title**.
14. Click **Save and Exit**.
15. Select the **1 Column** layout.
16. Click **Select Portlet Category**.
17. Click on **Content Portlets**.
18. Add a **Topic List** portlet.
19. Click **Save**.
20. Navigate back to the main HR Newsletter page.



21. Select **Actions > Edit Category**.
22. Click on the Publishing tab.
23. In the **Valid** area, click **Expires after** and set the value to 30 days.
24. In the **After Expiration** section, select **Move Topic into Category**.
25. Click on **Not Selected**.
26. Navigate through the tree and select **HR Newsletter Archive**.
27. Change **Allowed Topic Types**, select **From List** and make sure only **Web Page (Editor)** is selected.
28. Click Save and Exit.

Edit Category : Departments : Human Resources : Newsletter Save and exit Save and refresh Cancel

General Topic properties Security Category Icon **Publishing** Propagation

Default Publishing Period

Activate in days

Valid

- Unlimited
- Expires after days
- Flag for Review
- Disable
- Delete topic
- Move topic into category

After Expiration

- Departments : Human Resources : Newsletter : Newsletter
- Archive
- Start Workflow

Notify owner

- Don't notify
- Notify day before Expiration.

Disable modification by the user

Allowed Topic Types

- All
- From List
 - File
 - Link / Bookmark
 - Note
 - Web Page (Editor)

To test this feature, you may wish to go back and set the Expires After value to something small, like 1 day. Then publish a new web page in the HR Newsletter Category and come back tomorrow to see that it has been automatically moved to the Archive.


See also

- [Add Departmental Content](#)
- [Basic Document Approval](#)
- [Advanced Document Approval Workflow](#)
- [Topic Properties \(Metadata\)](#)
- [Make Your Documents Easier to Find](#)

Home > Document and Content Management > Topic Properties (Metadata)

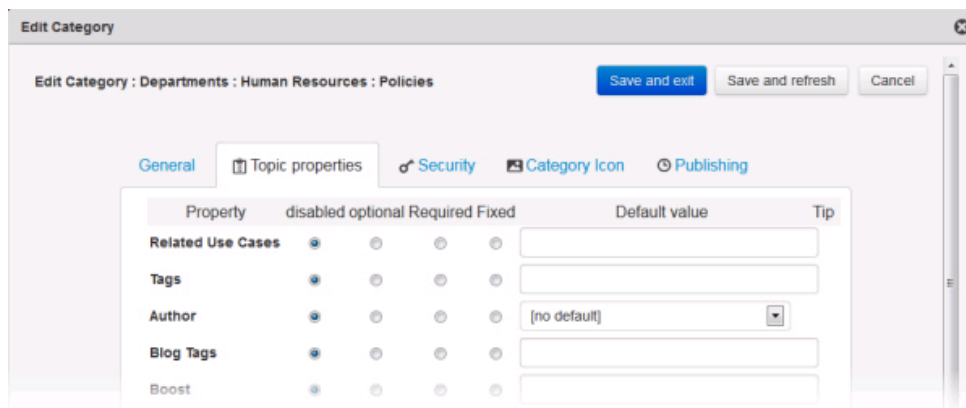
Topic Properties (Metadata)

Topic Properties (also called Tags) allow you to classify and structure your documents in a more complex and flexible way than with categories alone. We will create two Topic Properties for use in the HR Department category. The first will be a keyword list that users may add to help tag documents. The second will be a list of options to identify the area that a policy applies to.

1. Go to the Administration Portal.
2. Click the Metadata icon.  **Metadata**
3. Click the New icon.
4. Enter *Keywords* as the **Caption**.
5. Select **Keyword List** as the **Property Type**.
6. Leave the **Value List** empty.
7. Select **Optional** as the **Usage**.
8. Enter Add tags to help classify this document. Tags should be keywords that relate to the content of the document. as the **ToolTip**.
9. Check **Tag**.
10. Check **Show in Directory**.
11. Check **Public**.
12. Click the Save icon.
13. Click the New icon.
14. Enter *Policy Area* as the **Caption**.
15. Select **Radio Buttons** as the **Property Type**.
16. Enter Facilities and Building; Coworkers and Ettiquette; Vacation and Benefits; General as the **Value List**.
17. Select **Optional** for **Usage**.
18. Check **Tag** and **Show in Directory**
19. Click the Save icon.

Now that you have created the Topic Properties, we need to associate them with the Policies category.

1. Navigate to the Policies category.
2. Select **Actions > Edit category**
3. Click on the Topic Properties tab.



Property	disabled	optional	Required	Fixed	Default value	Tip
Related Use Cases	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Tags	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Author	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	[no default]	
Blog Tags	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Boost	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		

4. Set **Keywords** to **Optional**.
5. Set **Policy Area** to **Required**.
6. Click **Save and exit**.

Now publish a new document. You will see some new options on the General tab. You are required to select one of the Policy Area options and you can optionally add Keywords by clicking the checkbox and adding a comma-separated list. (Remember, you will need to complete the HR Document Approval Workflow before the document becomes published. The admin user has permissions to complete all steps)


Publish Content: Web Page (Editor)

Step 2: Enter Details

Title ^{ABC}

Description ^{ABC}

Add Metadata

Policy Area Faculties and Building Coworkers and Etiquette Vacation and Benefits General 

Tags

See also

[Add Departmental Content](#)
[Basic Document Approval](#)
[Advanced Document Approval Workflow](#)
[Document Lifecycle](#)
[Make Your Documents Easier to Find](#)

Home > Document and Content Management > Make Your Documents Easier to Find

Make Your Documents Easier to Find

Now that we have added Topic Properties to our HR Documents, we should give users more tools to take advantage of these tags to find HR Documents.

1. Navigate to the HR Department Home Site
2. Select **Actions** > **Select Portlets**
3. Click **Content Portlets**
4. Add **Search** to the narrow side
5. Add **Tags** to the wide side.
6. Click **Save**
7. Edit the Search portlet properties.
8. Enter *Search HR Site* as the **Portlet Caption**
9. Select ***Current Category and Subcategories*** as **Start Category**
10. Click **Save & Exit**
11. Edit the Tags portlet properties
12. Enter *HR Keywords* as the **Portlet Category**
13. Click **Save & Exit**

See also

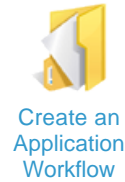
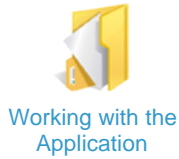
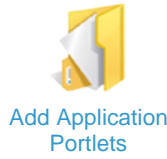
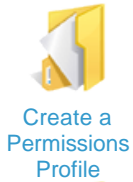
[Add Departmental Content](#)
[Basic Document Approval](#)
[Advanced Document Approval Workflow](#)
[Document Lifecycle](#)
[Topic Properties \(Metadata\)](#)

Home > Working with Applications

Working with Applications

Applications allow you to store, share and visualize data. The core of an Application is a database, but with our Application Builder and Application/Dashboard Portlets, even non-technical users can easily create forms, data views and charts.

We will go through all the steps necessary to create a Job Candidate Tracking database that allows HR Users to track a candidate through the interview process and communicate with the departmental Hiring Manager.



See also

- [Welcome](#)
- [Installation](#)
- [Get Started](#)
- [Create Departmental Portal](#)
- [Document and Content Management](#)
- [Communities](#)
- [Integrating Outside Resources](#)
- [Branding](#)
- [About](#)

Home > Working with Applications > Create a Permissions Profile

Create a Permissions Profile

We have already looked at how to use Roles and Users to grant permissions to categories. Because Applications can be viewed across categories and involve different access options, they use a different form of access management - Permissions Profiles.

We will be making a Job Candidate Tracking application for use by the HR Department. So we will create a new Permissions Profile that can be applied to this and all other HR Department applications.

1. Navigate to the Administration portal
2. Click the Permissions Profile icon



Permission
Profiles

3. Click the New icon
4. Enter HR Public Applications as the **Description**
5. Click the Save icon
6. Click **Add Roles**
7. Check **Administrators**, **Everybody**, **HR Admins** and **HR Users**
8. Click the Save icon
9. Grant **Administrators Application Designer** rights, grant **HR Admins Edit, New, Delete & Assign Permissions**, grant **HR Users Edit, New & Delete**. Grant **Everybody View** permissions.
10. Click the Save icon.
11. Click the Exit icon.

Permissions : Permission Profiles						
<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Help"/>						
<input type="button" value="Add Roles"/> <input type="button" value="Add Users"/>						
Type	Role	no Access	View	Edit, New & Delete	Edit, New, Delete & Assign Permissions	Application Designer
Role	Administrators	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Role	everybody	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Role	HR User	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Role	HR Admins	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

See also

[Create the Job Candidate Tracker Database](#)
[Add Application Portlets](#)
[Working with the Application](#)
[Create an Application Workflow](#)
[Edit the Application](#)
[Test the Application Workflow](#)

Home > Working with Applications > Create the Job Candidate Tracker Database

Create the Job Candidate Tracker Database

In this example, we will create a new Application by cloning an existing template. You may also create new applications by starting blank or you can download and customize solutions from adenin TECHNOLOGIES Application Exchange.

1. Navigate to the Administration portal
2. Click the Application Builder icon



Application
Builder

3. Enter HR Candidate Tracking as the **Table Name**
4. Enter HR Job Candidate Tracker as the **Table Caption**
5. Leave **Solution** blank
6. Select **HR Public Applications** as the **Permission Profile**
7. Select **Job Candidate Tracker** for **Clone Application**
8. Click **Continue**


 Application Builder: Create New Table

Table Name*	<input type="text" value="HR Candidate Tracker"/>
Table Caption	<input type="text" value="Job Candidate Tracker"/>
Solution	<input type="text" value=""/>
Permission Profile	<input type="text" value="HR Apps"/>
Clone Application	<input type="text" value="Job Candidate Tracker"/>

9. Click **Continue** on the next screen

You are now in the main Application Builder menu and can perform all necessary actions for customizing and extending your application.

Application Builder: Job Candidate Tracker

Application

- Edit Properties
- Manage Unique Constraints
- Delete Application

Fields

- Edit Field
- Add Field
- Delete Field
- Reorder Fields
- Move Field

Action Links

- Edit Action Link
- Add Action Link
- Delete Action Link

Views

- Edit View
- Add Basic View
- Add Advanced View
- Add Calendar View
- Add Matrix View
- Copy View
- Delete View

SubTables

- Add SubTable
- Delete SubTable

Finish Continue ->

First, we want to enable searching of the application.

1. Check **Edit Properties** and click **Continue**
2. Check **Include in Search** and click **Continue**
3. Click **Continue**

We will now customize this template to meet our specific needs. First, we will remove unnecessary fields.

1. Check **Delete Field** and click **Continue**
2. Check **Delete Field Recruiting Requisition** and click **Continue**

Job Candidate Tracker - Delete Field

- Delete Field **First Name** (FName - Text Field)
- Delete Field **Address** (Address - Text Box)
- Delete Field **Home Phone** (HomePhone - Text Field)
- Delete Field **Cell Phone** (CellPhone - Text Field)
- Delete Field **Business Phone** (BusPhone - Text Field)
- Delete Field **E-Mail** (eMail - eMail Address)
- Delete Field **Recruiting Requisition** (Requ - Database reference)
- Delete Field **Available at** (avail - Date)
- Delete Field **Rating** (Rating - Tri-State)
- Delete Field **Hiring Manager** (HRMgr - Database lookup)

Cancel Continue ->

3. Check the checkbox and click **Delete Field** to confirm
4. Click **OK** to return to the main menu
5. Repeat this process to delete the field **Available at**

Now we will add and edit some fields.

1. Check **Edit Field** and click **Continue**
2. Check **Rating** and click **Continue**

Job Candidate Tracker - Edit Field

Caption = \$pp-Rating|Rating\$

Tooltip [Empty field with help icon]

Field Length 1

Grid Column Width 0 [Help icon]

Search/Sort Field

Enable Full Text Search

Input required

Field Type [Three radio button options with icons]

Display in new line

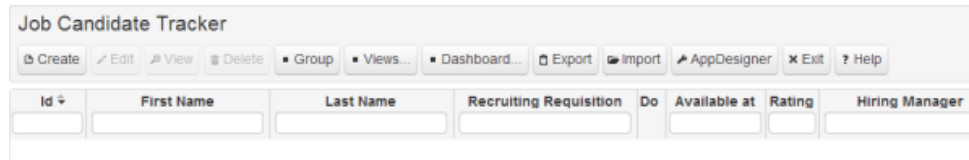
Edit Mode Input (Default)

Cancel Continue ->

3. Change the **Caption** to Phone Screen Rating and click **Continue**
4. Select the middle option as the **Default Value**
5. Click **Continue**
6. Click **OK**
7. Check **Add Field** and click **Continue**
8. Enter Interview Rating as the **Field Name**

9. Enter Departmental Interview Rating as the **Field Caption**
10. Check **Tri-State** as the **Field Type**
11. Click Continue
12. Choose the Thumbs Up/Thumbs Down icons for Field Type
13. Click Continue
14. Check the middle option as the Default Value and click Continue
15. Select Field Position **After Field Hiring Manager**
16. Click Add Field
17. Click OK to return to the main menu
18. Click Finish.

You will now see an empty grid with columns for each of the fields in your application. This is the Full Application view.



The screenshot shows the 'Job Candidate Tracker' application interface. At the top, there is a title bar with the text 'Job Candidate Tracker'. Below the title bar is a menu bar with several options: Create, Edit, View, Delete, Group, Views..., Dashboard..., Export, Import, AppDesigner, Exit, and Help. Below the menu bar is a table with the following columns: Id, First Name, Last Name, Recruiting Requisition, Do, Available at, Rating, and Hiring Manager. The table is currently empty.

Id	First Name	Last Name	Recruiting Requisition	Do	Available at	Rating	Hiring Manager

See also

- [Create a Permissions Profile](#)
- [Add Application Portlets](#)
- [Working with the Application](#)
- [Create an Application Workflow](#)
- [Edit the Application](#)
- [Test the Application Workflow](#)

Home > Working with Applications > Add Application Portlets

Add Application Portlets

Now that we have created the Job Candidate Tracker application, we need to add portlets to allow HR Users to work with it.

1. Navigate to the HR Department Home Site
2. Select **Actions > Add subcategory**
3. Enter *Job Candidate Tracking* as the **Page Title**
4. Click on the Security tab
5. Since we want this to be only be visible for members of the HR Department, set **Everybody** to **no Access**. Because there will be no documents published, set **HR Users** to **Read** access. Grant **HR Admins** and **Administrators** **Administrator** rights.
6. Click **Save and Exit**
7. Select the **1 Column** layout
8. Click **Select Portlet Category**
9. Click on **Applications, Reports & Dashboards**
10. Add two **Database/Application Portlets**
11. Click **Save**
12. Edit the top portlet's properties by clicking on the Edit button
13. Type *Enter New Candidate* as the **Portlet Caption**
14. Select **HR Job Candidate Tracker** as the **Application**
15. Select **New Record** as the **Action**
16. Change the **Height** to 350

Parameter	Value	Comment
Portlet caption	Enter new candidate	overrides default caption
Portlet Chrome (Border)	Default Chrome (style dependent)	select portlet chrome for user view
Show asynchronous (AJAX)	<input type="checkbox"/>	
Lock Portlet	<input type="checkbox"/>	Only Administrators can modify locked portlets
Application	Recruiting Manager: Recruiting Requisitions	
Action	New Record	
View	Overview	
Height	300	(in pixels)

17. Click **Save & Exit**
18. Edit the second Application Portlet's properties
19. Enter *View All Candidates* as the **Portlet Caption**
20. Select **HR Job Candidate Tracker** as the **Application**
21. Select **Grid** as the **Action**
22. Change **Height** to 200

Recruiting Requisitions - Overview (Collaboration Portlets: Database/Application Portlet)

Save Help

Parameter	Value	Comment
Portlet caption	<input type="text"/>	overrides default caption
Portlet Chrome (Border)	Default Chrome (style dependent) ▾	select portlet chrome for user view
Show asynchronous (AJAX)	<input type="checkbox"/>	
Lock Portlet	<input type="checkbox"/>	Only Administrators can modify locked portlets
Application	Recruiting Manager: Recruiting Requisitions ▾	
Action	Grid ▾	
View	Overview ▾	
Height	300	(in pixels)

Save Help

23. Click **Save & Exit**

Enter new candidate

Submit Help

Position*

Description

Organization Unit ▾

Location*

Hiring Manager Administrator ▾

Target Start Date

Priority ▾

Status* ▾

Job Candidate Tracker - Overview

First Name ↕	Last Name	Recruiting Requisition	Hiring Manager
David	Test		James Cook
Fred	Smith	Junior Staff	James Cook
Gilbert	Ho		James Cook
Han	Job		Joane Peters
henri	dupont		James Cook
I Can	Do It		James Cook
John	Doe		Joane Peters
Manoj	Hardwani		James Cook
Márcio	Soares	Worker	James Cook

Patuncio	Oliveira		James Cook
Robert	Daggar	IT auditor	Joane Peters
Sandeep	V	Software Developer	Adam Kilpatrick

See also

- [Create a Permissions Profile](#)
- [Create the Job Candidate Tracker Database](#)
- [Working with the Application](#)
- [Create an Application Workflow](#)
- [Edit the Application](#)
- [Test the Application Workflow](#)

Home > Working with Applications > Working with the Application

Working with the Application

Before we move on to create a workflow for the Job Candidate Tracker application, take a few minutes to add some entries using the form and to manipulate the data in the grid.

Add Entries

To add a new entry, fill out the Enter New Candidate form and hit the Save icon.

Fields marked with a red * are required

The Hiring Manager field is linked to your user database and updates as you type to try to help you auto-complete. Try this by deleting Administrator and typing HR. A pop up list will appear, showing you the options **HR Admin** and **HR Worker Bee**. You can select one using your mouse or keep typing to narrow the list further.

View and Manipulate Entries

The data grid may not immediately update. Click the Refresh button at the bottom to update the grid.

Click on any heading to sort on that column.

Advanced Manipulation

If you'd like to see advanced options for the grid, edit the portlet properties. Change **Action** from **Grid** to **Filter Grid**. You will now see new options available.

Type the last name of an existing entry in the filter area and hit ENTER. The grid will be updated, showing only entries with that last name.

To see all entries again, click on the filter icon and select Clear This Filter.

Drag the Hiring Manager column heading into the orange box that reads **Drag a column header here to group by that column**. You should now see a list of the different Hiring managers you selected, followed by the number of candidates assigned to this manager. Click on the + icon next to any manager name to view all the entries.

See also

- [Create a Permissions Profile](#)
- [Create the Job Candidate Tracker Database](#)
- [Add Application Portlets](#)
- [Create an Application Workflow](#)
- [Edit the Application](#)
- [Test the Application Workflow](#)

Home > Working with Applications > Create an Application Workflow

Create an Application Workflow

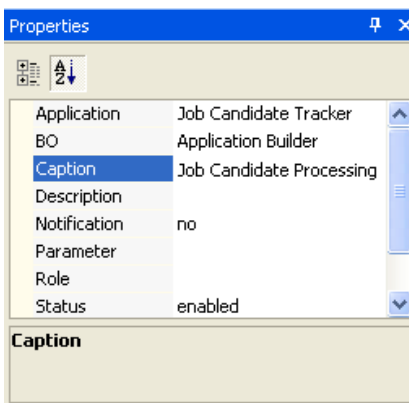
As mentioned in the section on creating a Document Approval Workflow, you can also create Workflows for Applications. These types of Workflows ensure that when many people need to participate in an application (for example a Vacation Request or our Job Candidate Tracker) and take specific actions, they can be aware of what is expected of them and when.

Design the Workflow

1. Open the Workflow Designer and log in as admin. (For step by step instructions, see Advanced Document Approval Workflow)
2. Create a new Workflow
3. Click on the start Node
4. Select **HR Job Candidate Tracker** as the **Application** and set **BO** to **Application Builder**

By associating our Workflow with the HR Job Candidate Tracker in this way, we will now have access to parts of the Application for more specialized workflow options that can help automate the process.

5. Enter `Job Candidate Processing` as the **Caption**

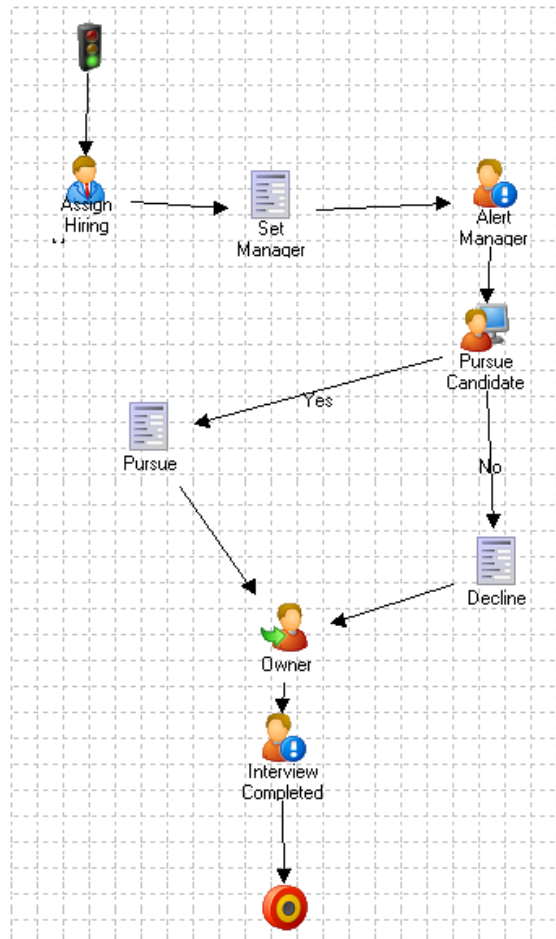


6. Add a **User** action to the process.
7. In the User action properties, enter `Assign Hiring Manager` as the **Caption**
8. Select **User Selection** for **Mode**
9. Set **Override** to **Yes**.

By using the combination of Mode = User Selection and Override = Yes, we make this step interactive.

10. Draw a transformation from the Start Node to the User action.
11. Add a **Set Field Value** action to the process. The Field Value action can be found by clicking on the Application bar on the left column. This will display all actions that are specific to Application Builder workflows.
12. In the Field Value action properties, enter `Set Manager` as the **Caption**
13. Select **Hiring Manager** as the **Field**
14. Select `func:currentuser` as the **NewValue**. This will change the form value for Hiring Manager to the user selected in the previous step.
15. Draw a transformation from the User action to the Field Value action.
16. Add an **Information** action to the process.
17. Enter `Alert Manager` as the **Caption**.
18. Enter `Please contact this candidate for an interview` as the **Description**.
19. Draw a transformation from the Field Value to the Information action.
20. Add a **Decision** action to the process.
21. Enter `Pursue Candidate` as the **Caption**.

22. Enter `Should we pursue this candidate?` as the **Description**.
23. Draw a transformation from the Information action to the Decision action.
24. You may remember from the Document Approval Workflow that the decision options are assigned on the transformation, so first we need to create the possible outcome actions. Add a **Set Field Value** action to the process.
25. Enter `Pursue` as the **Caption**
26. Select ***Departmental Interview Rating*** as the **Field**.
27. Enter `3` for the **NewValue**. Because Interview is a Tri-Value Field, 3 = thumbs up.
28. Add another **Set Field Value** action.
29. Enter `Decline` as the **Caption**.
30. Select ***Departmental Interview Rating*** as the **Field**.
31. Enter `1` for the **NewValue**.
32. Now draw a transformation from the Decision action to each of the possible Field Value outcome actions.
33. Select the transformation from Pursue Candidate to Pursue.
34. Enter `Yes` for the **Caption**.
35. Select the transformation from Pursue Candidate to Decline.
36. Enter `No` for the **Caption**.
37. Now we want to return the task to the HR user who first entered the information so that s/he will know the interview has been conducted and what the outcome was. Add a **Transfer to Owner** action to the process.
38. Add an **Information** action to the process.
39. Enter `Interview Completed` as the **Caption**.
40. Enter `The Hiring Manager has Completed the Interview and Rated the Candidate` as the **Description**.
41. Draw a transformation from the Pursue action to the Transfer to Owner action.
42. Draw a transformation from the Decline action to the Transfer to Owner action.
43. Draw a transformation from the Transfer to Owner action to the Information action.
44. Draw a transformation from the Information action to the Target (end node) to complete the Workflow.



See also

- [Create a Permissions Profile](#)
- [Create the Job Candidate Tracker Database](#)
- [Add Application Portlets](#)
- [Working with the Application](#)
- [Edit the Application](#)
- [Test the Application Workflow](#)

Home > Working with Applications > Edit the Application

Edit the Application

We need to make a few changes to the HR Job Candidate Tracker Application so it will work properly with the workflow.

1. Navigate to the HR Job Tracking category
2. Click on the portlet title of the Enter New Candidate portlet to open the Full Application View
3. Click on the Application Builder icon
4. Check **Edit Properties** and click **Continue**
5. Set **Workflow** to **Job Candidate Processing**
6. Click **Continue**, then **Continue** to return to the main menu
7. Check **Edit Field** and click **Continue**
8. Check **Hiring Manager**, then click **Continue**
9. Uncheck **Input Required**
10. Click **Continue**.
11. Make no edits on the Default Value page, click **Continue**.
12. Click **Ok** to return to the main menu.
13. Click **Finish**.

See also

[Create a Permissions Profile](#)
[Create the Job Candidate Tracker Database](#)
[Add Application Portlets](#)
[Working with the Application](#)
[Create an Application Workflow](#)
[Test the Application Workflow](#)

Home > Working with Applications > Test the Application Workflow

Test the Application Workflow

You can test the workflow by entering new candidates and assigning them to different Hiring Managers, then logging in as the different users.

The same Workflow portlets you use for the Document Approval workflow will display the status and tasks for all Workflows, including this new one.

See also

- [Create a Permissions Profile](#)
- [Create the Job Candidate Tracker Database](#)
- [Add Application Portlets](#)
- [Working with the Application](#)
- [Create an Application Workflow](#)
- [Edit the Application](#)

[Home](#) > [Communities](#)

Communities

Communities give cross-departmental groups the space and tools to collaborate effectively. You may be familiar with this concept from Yahoo! Groups or MSN Groups. Some examples of professional Communities would be a project team, an event planning committee, or a corporate social group.

New Communities can be created at any time without disruption to the rest of the intranet.

Create New Community

Communities give cross-departmental groups the space and tools to collaborate effectively. You may be familiar with this concept from Yahoo! Groups or MSN Groups. Some examples of professional Communities would be a project team, an event planning committee, or a corporate social group. New Communities can be created at any time without disruption to the rest of the intranet.

1. Navigate to the Administration portal.
2. Click **Create a new Community** to start the Community Wizard.
3. Enter *Intranet Building Team* as the **Caption**
4. Select **Administrators** as the **Administration role for this Community** and click **Continue**.
5. Select **Public** as the **Membership Mode**.

Communities can have three types of memberships:

- **Public** any user can join the Community
- **Registration** any user can request to join the group, but new users must be approved by a group administrator
- **Invitation Only** the Community is "unlisted" and can be joined only by those the administrators invite

1. Accept the default member role name by clicking **Continue**.
2. Add the role **Everybody** to the Community **Audience** by clicking the green plus sign. By creating this group as Public with an Audience of Everybody, you are allowing any intranet user to join this group.
3. Click **Continue**.
4. Select **Community Page** as the template for the home page of the Community.
5. Click **Continue**
6. Skip the email invitation step by leaving the **Yes** checkbox unchecked and clicking **Create Community**.
7. Click **OK** on the confirmation page.

Working with Communities

1. Navigate to the Communities portal.
2. The Communities Administration Portlet lists all Communities for which you are an administrator.
3. Click the plus sign to view all members of the group. You can use this portlet to invite group members, edit the group settings or delete the group.
4. The My Communities Portlet lists all Communities in which you belong to, as well as any Communities for which you are a member of the Audience.
5. Click **Intranet Building Team** to open the home page of the Community.
6. The home page of the Community is already populated with the portlets defined in the Community Page template. You can now customize this page as you would any other category.

See also

[Welcome](#)
[Installation](#)
[Get Started](#)
[Create Departmental Portal](#)
[Document and Content Management](#)

[Working with Applications](#)
[Integrating Outside Resources](#)
[Branding](#)
[About](#)

Home > Integrating Outside Resources

Integrating Outside Resources

IntelliEnterprise offers many ways to integrate outside resources and content. This is a great way to pull in industry news, corporate web site information, or other frequently updated content that is not maintained within your portal.



[Display External Pages](#)



[Display External News Feeds \(RSS\)](#)

See also

- [Welcome](#)
- [Installation](#)
- [Get Started](#)
- [Create Departmental Portal](#)
- [Document and Content Management](#)
- [Working with Applications](#)
- [Communities](#)
- [Branding](#)
- [About](#)

Home > Integrating Outside Resources > Display External Pages

Display External Pages

In this step, we will integrate the News section of your corporate website. If your site does not have such an area, use ours: <http://www.adenin.com/news.asp>

1. Navigate to the Corporate home page
2. Select **Actions > Select Portlets**
3. Click **Content Portlets**
4. Add an **IFrame** portlet to the wide part of the page
5. Click **Save**
6. Click the Edit Properties button for the IFrame Portlet
7. Enter `Our Press Releases` as the **Caption**
8. Enter the URL of your News page as the **Source**.
9. Enter `Site Currently Unavailable` as the **No IFrame Text**.
10. Click **Save & Exit**.

See also

[Display External News Feeds \(RSS\)](#)

Home > Integrating Outside Resources > Display External News Feeds (RSS)

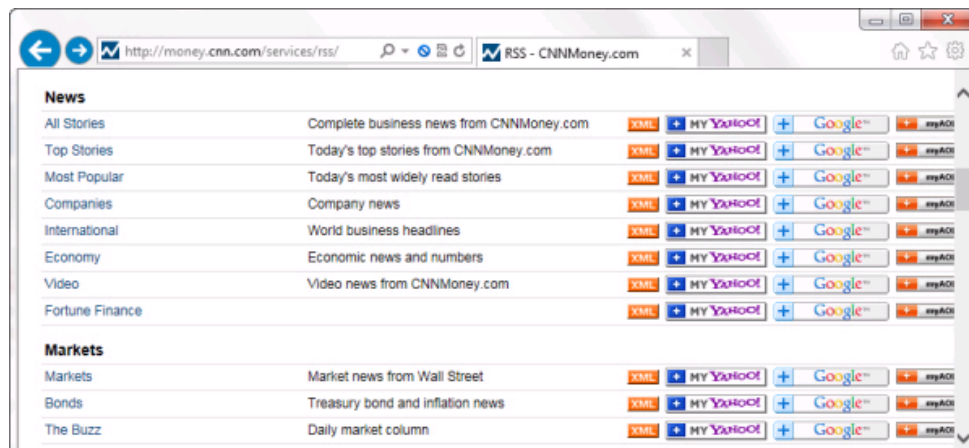
Display External News Feeds (RSS)

RSS (Really Simple Syndication) has become a common format for news sites and blogs to use when publishing stories. By using RSS, these sites provide a "feed" of all new articles, updated in real time. RSS feeds can be read by Readers or Aggregators, such as NewsGator or Google Reader, or they can be integrated into websites like My Yahoo or iGoogle. Now you can have them on your intranet as well.

Find the RSS feed you want to use

If you want to skip this section, just use http://rss.cnn.com/rss/money_topstories.rss

The latest generation of browsers dropped a feature, that would previously indicate the existence of an RSS feed automatically. Instead, you now need to navigate to a "RSS" titled section of the respective webpage manually. There you have many different feeds to choose from and also different formats. In this example please use the standard "XML" format. Click the button and copy the URL of the following page.



Add the RSS Feed to your Intranet

1. Click on the Administration Portal Tab.
2. Click Portlet Wizard.
3. Check **Integration** and click **Continue**.
4. Check **News Feed (RSS)** and click **Continue**.
5. Enter CNN Business as the **Caption**
6. Select **Tools** as the **Category**.
7. Select **every hour** as the **Cache Group** (this sets the frequency of updates)
8. Click **Continue**.
9. Paste the URL of the news feed for the **URL**.
10. Enter 5 in the **News Count** field.
11. Click on **Save & Refresh Preview**, then **Exit**.
12. Navigate to the Corporate Home Page
13. Select **Actions > Select Portlets**
14. Click **Tools**.
15. Add the CNN Business portlet to the narrow side of the page.
16. Click **Save & Exit**.

The Portlet might show 'Portlet temporarily inactive' until the news feed is loaded for the first time. This initial load might take up to 15 minutes.

See also

[Display External Pages](#)

[Home](#) > [Branding](#)

Branding

IntelliEnterprise gives you many ways to make the intranet your own. From simple logos and customization to full style editing, there's a solution to fit every situation.



[Simple Branding](#)



[Simple Styles](#)



[Advanced Style Editing](#)



[Expert Style Editing](#)

See also

- [Welcome](#)
- [Installation](#)
- [Get Started](#)
- [Create Departmental Portal](#)
- [Document and Content Management](#)
- [Working with Applications](#)
- [Communities](#)
- [Integrating Outside Resources](#)
- [About](#)

Home > Branding > Simple Branding

Simple Branding

The easiest place to start branding your site is by adding your corporate logo and name.

1. Go to the Administration portal
2. Click on the Configuration icon.
3. Find the **Text for My Home Link** option and enter customized text for your company.
4. Click **Save**.
5. Click **OK** in the confirmation window.
6. Now click on My Home to refresh the page and change the text to what you just typed.
7. Return to the Administration portal
8. Click the Upload Logo icon.
9. Click on the **Edit...** button for **Top Logo** (shown on the top left of every page).
10. Click on **Browse...**
11. Use the file browser to select a new logo image.
12. Click **Open**.
13. Click **Upload**. This will update the logo on the top of the screen.

See also

[Simple Styles](#)
[Advanced Style Editing](#)
[Expert Style Editing](#)

Home > Branding > Simple Styles

Simple Styles

IntelliEnterprise comes with 12 default styles that can be easily changed.

1. Click **Preferences**
2. Click **Select Style**
3. Check the preview image of the style you want to use
4. Click **Save Settings**, then **OK**
5. Navigate to your main page to see the new style in use.

See also

[Simple Branding](#)
[Advanced Style Editing](#)
[Expert Style Editing](#)

Home > Branding > Advanced Style Editing

Advanced Style Editing

IntelliEnterprise comes installed with Style Manager, as easy-to-use program for advanced Style Editing.

1. From your Windows Desktop, select Start > All Programs > adenin > Tools > Style Manager
2. In the Style Manager, select **Style > New from Template > Sahara**
3. Click **Style > Save As** and enter `MyStyleTest` as the **Name**
4. Click **Save**
5. Click one of the tabs that reads Tab Default. The style properties for tabs will be displayed in the bottom right area.
6. Click **FontColor**.
7. Click the ... button that is now visible.
8. Select black as the new font color. You will see it updated in the main window.
9. You can continue to alter the style in this way. When you are satisfied, save the Style and close the Style Manager.
10. Return to the portal and click on **Preferences**
11. Click **Select Style** and you will see MyStyleTest available.

See also

[Simple Branding](#)

[Simple Styles](#)

[Expert Style Editing](#)

Home > Branding > Expert Style Editing

Expert Style Editing

Those familiar with HTML, CSS and XSL can edit the style and layout files directly. Please consult the online KnowledgeBase and adenin support for more information.

See also

[Simple Branding](#)
[Simple Styles](#)
[Advanced Style Editing](#)

The information in this documentation is accurate as at time of print and changes could have been made since then. adenin is not responsible for any loss or damage that may be incurred or suffered by anyone attempting to update their software without the necessary care and equipment. Please visit www.adenin.com for more information. Created: Monday, October 28, 2013

You will need the latest version of IntelliEnterprise to make use of all the features described in this documentation. To upgrade from an older version for free, you will need a valid support and update subscription.

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