adenin
TECHNOLOGIES

IntelliEnterprise
QuickStart

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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 theses 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 KnowledgeBase for details on specific topics not covered here.

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.

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.
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

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. You must complete the Installation steps before you can follow this QuickStart Guide.

See also

Welcome
Get Started
Create Departmental Portal
Advanced Document Management
Working with Applications
Communities
Integrating Outside Resources
Branding

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>>/adenin/portal.asp (e.g. http://localhost/adenin/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 Phoenix Style. If you are having trouble following along because your portal looks different, please change to this style.

See also

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Working with Applications
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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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Home > Create Departmental Portal > Create HR Roles

Create HR Roles

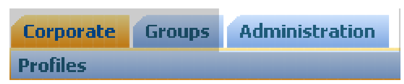
Roles are the basic units of permission within IntelliEnterprise. They control access to categories, documents, applications and workflows. Before we can continue, we need to create the Roles we will use in this section of the QuickStart.

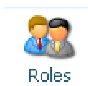
Because we are focused on the HR Department, we will create:

- 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. 

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.

See also

Create HR Users
Create Departments Portal
Create HR Department Home Site
Add HR Department Content Categories
Add Departmental Content

Home > Create Departmental Portal > Create HR Users

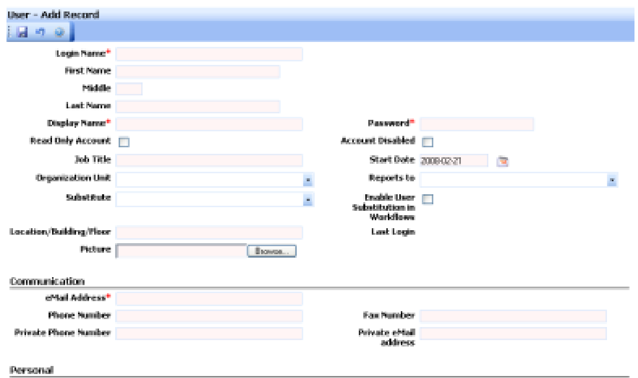
Create HR Users

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

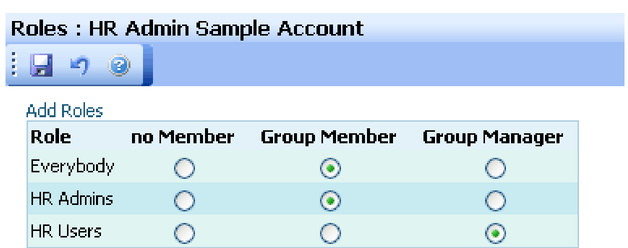
1. Click on the Administration Portal tab to open the Administration Portal.
2. Click on the Users icon 

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).



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

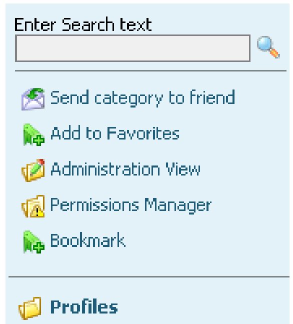
Create HR Roles
Create Departments Portal
Create HR Department Home Site
Add HR Department Content Categories
Add Departmental Content

Home > Create Departmental Portal > Create Departments Portal

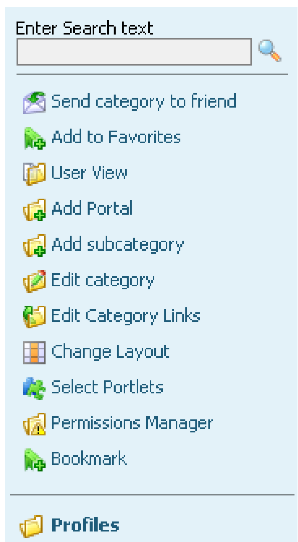
Create Departments Portal

Now we will create a Departments Portal, which would ultimately contain subcategories for each department. For the purpose of our QuickStart, we will focus only on the HR Department.

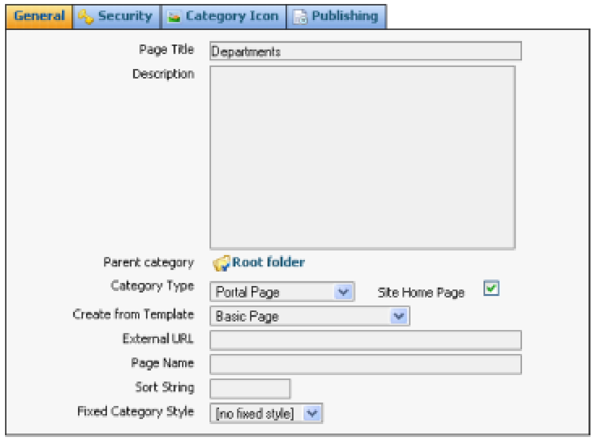
1. Click on the Actions menu on the top right area of the My Home page to show the page actions menu.
2. Enable Administration mode by clicking on the Administration View action link.



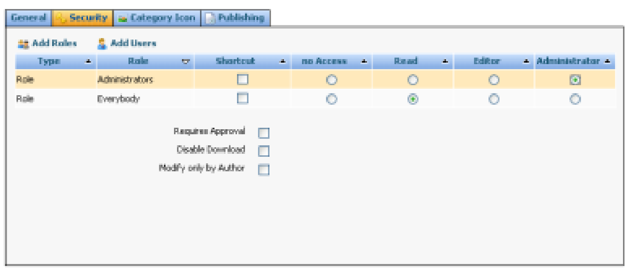
Enabling Administration mode will display additional Administrative actions on the Actions menu as well as on the Portlets.



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



See also

Create HR Roles
Create HR Users
Create HR Department Home Site
Add HR Department Content Categories
Add Departmental Content

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.

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

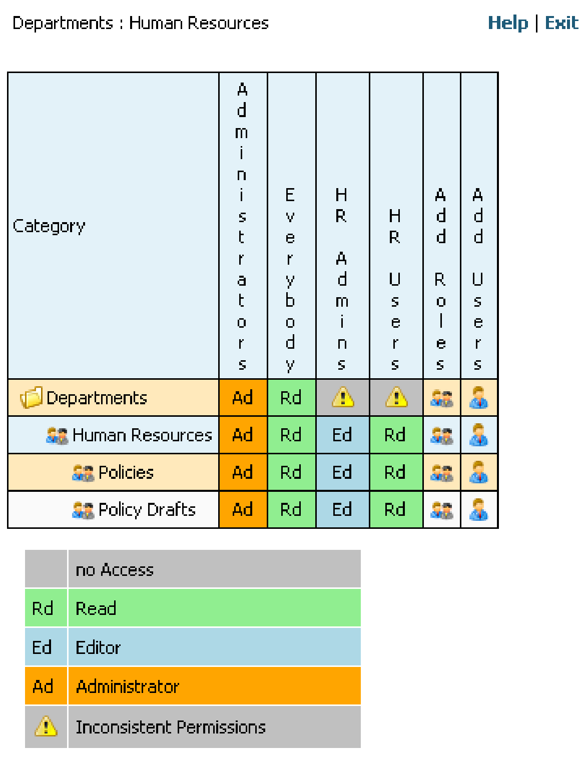
Create HR Roles
Create HR Users
Create Departments Portal
Add HR Department Content Categories
Add Departmental Content

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 Admins	HR Users	Add Roles	Add Users
Departments	Ad	Rd				
Human Resources	Ad	Rd	Ed	Rd		
Policies	Ad	Rd	Ed	Rd		
Policy Drafts	Ad	Rd	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

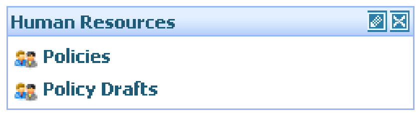
Home > Create Departmental Portal > Add Departmental Content

Add Departmental Content

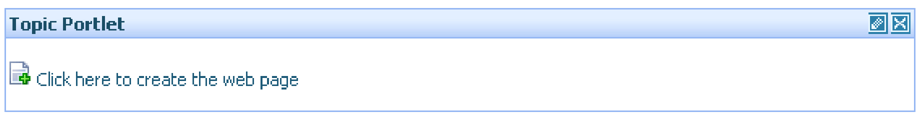
Now we will add content to our HR department pages. The HR Department home page will act as a sort of "gateway" for both HR and general users to see basic information and find their way to the additional information in the subcategories. Each subcategory will be set up for simple document publishing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

The HR Home site

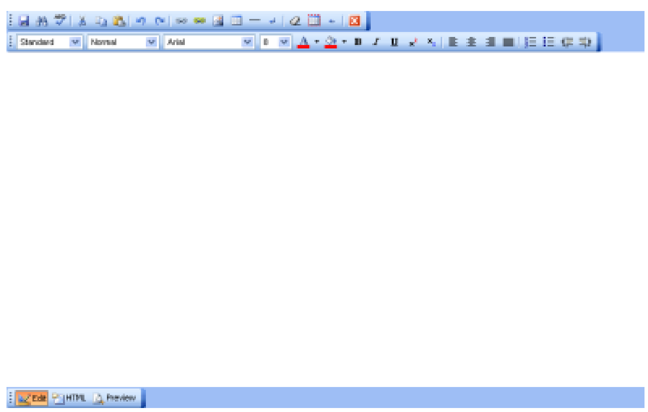
Because we selected the Content Page Template when we created the HR Home Site, it will already have a Navigation portlet and a Topic Portlet.



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

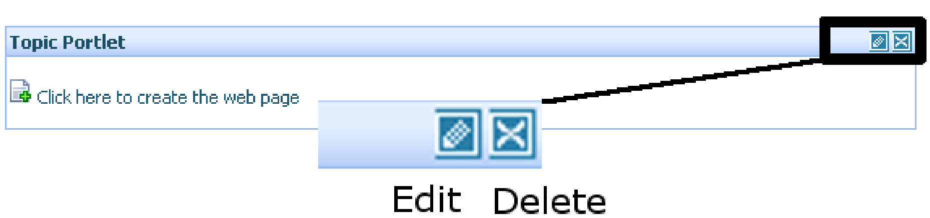


1. Click the link inside the Topic Portlet that reads `Click here to create the web page`. This will open the WYSIWYG HTML Editor. As you can see, this looks and acts very much like Word.



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. Enter `My First Policy` as the Title and add some descriptive text for the Abstract.
4. Select File as the Type.
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.

Building out the HR Home Site

Because 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 > Select 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. Click the red + (plus) icon to add the News portlet to the wide part of the page.
3. Click on Select Portlet Category to return to the top level of the portlet catalog.
4. Click on Collaboration Portlets.
5. Click the blue + (plus) icon to add the Shared Calendar portlet to the narrow part of the page.
6. Click Save to return to the category 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 

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
Create Departments Portal
Create HR Department Home Site
Add HR Department Content Categories

Home > Advanced Document Management

Advanced Document Management

So far, we have done some simple tasks related to publishing documents on your intranet. IntelliEnterprise offers a number of advanced features for even greater control over how and when documents are available on the intranet.

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Home > Advanced Document Management > Basic Document Approval

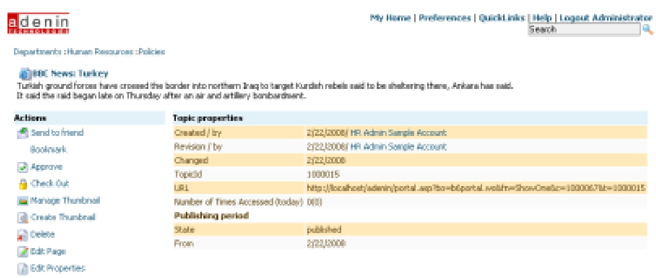
Basic Document Approval

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.  You will be brought to the Topic Properties page.



11. Click the Approve icon on the left side Actions list
12. Click OK
13. Log out and log in as HR Worker Bee.
14. Navigate to the Policies category. You will now be able to see the new, approved document.
15. Log out and log in as Admin.

See also

Advanced Document Approval Workflow
Document Lifecycle
Topic Properties (Tags)
Make Your Documents Easier to Find

Home > Advanced Document Management > Advanced Document Approval Workflow

Advanced Document Approval Workflow

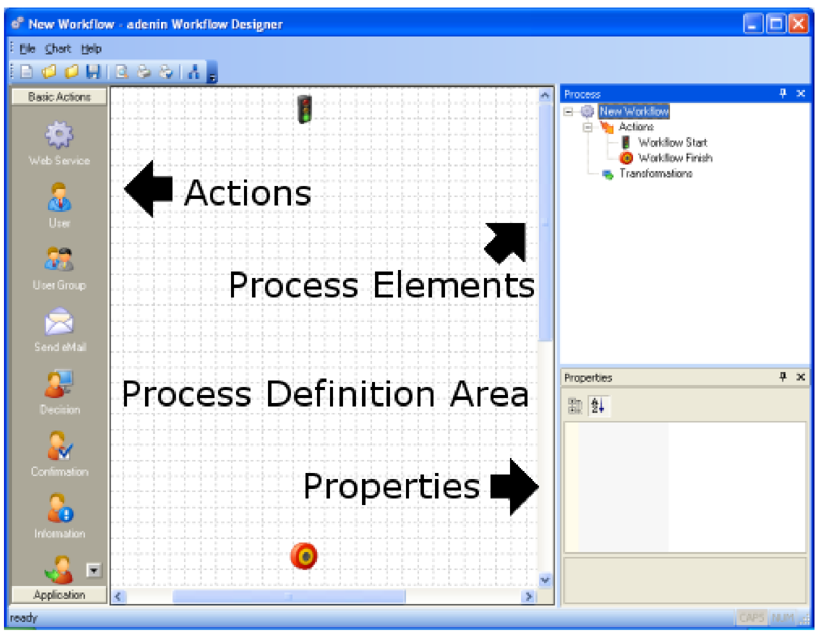
Though IntelliEnterprise comes with the simple workflow we just learned about, you may want to use a more complex approval workflow within your organization. For example, you may want to have the category administrator approve a document and then also ask for approval from HR or Compliance before it 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>>/adenin` (e.g. [`http://localhost/adenin`](http://localhost/adenin)).
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.

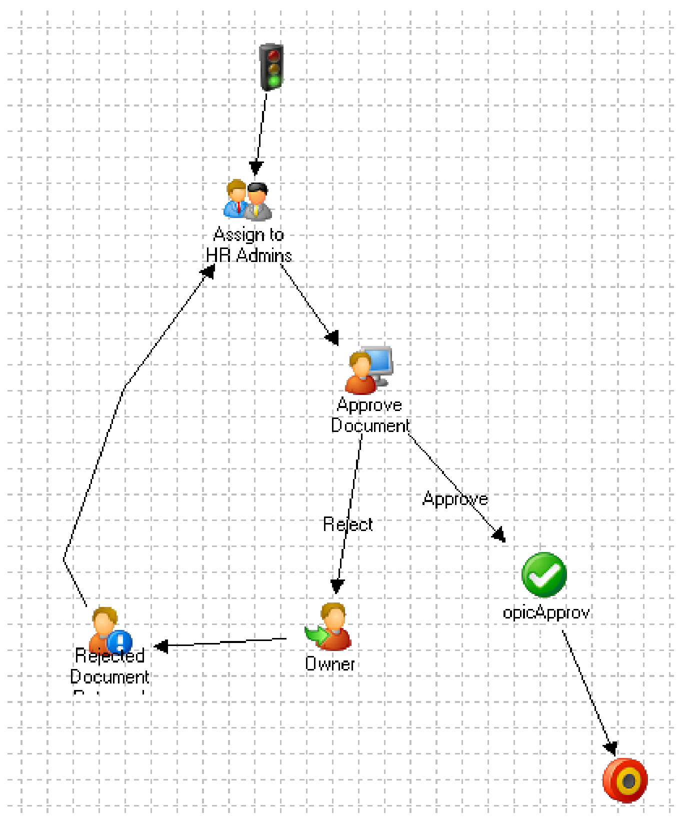
11. Drag and drop a `User Group` action into the process definition space.
12. Enter `Assign to HR Admins` as the `Caption`.
13. Set `Group Id` to `HR Admins`. This action now assigns new topics to the HR Admins role. Any member of the role can then take on the task and complete it.
14. Drag and drop 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 Builtin 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

Basic Document Approval
Document Lifecycle
Topic Properties (Tags)
Make Your Documents Easier to Find

Home > Advanced Document Management > Advanced Document Approval Workflow > Workflow Portlets

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

Home > Advanced Document Management > Advanced Document Approval Workflow > 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	2/28/2008 5:06:38 PM

My Workflows

Task Id	Type	State	Caption	Started	Current User	Due Date
1000003	HR Document Approval	Assign to HR Admins	New policy for workflow	2/28/2008 5:06:37 PM	Administrator	2/28/2008 5:06:38 PM
1000003	HR Document Approval	Assign to HR Admins	New policy for workflow	2/28/2008 5:06:37 PM	HR Admin Sample Account	2/28/2008 5:06:38 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	2/28/2008 5:06:38 PM

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	http://localhost/adenin/portal.asp?bo=b6Portal.wo&fn=topedit&c=1000067&t=1000018
Assigned to	Administrator HR Admin Sample Account

7. 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.

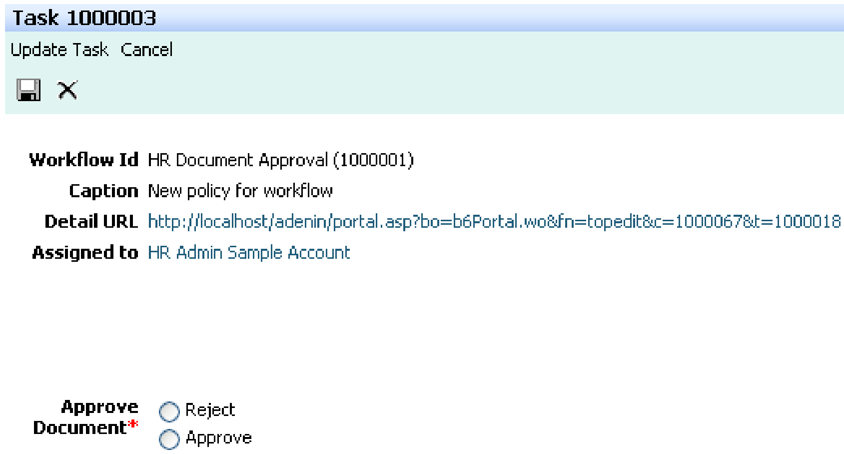
My Workflow Tasks

Task Id	Type	State	Caption	Due Date
1000003	HR Document Approval	Approve Document	New policy for workflow	2/28/2008 5:22:08 PM

My Workflows

No open tasks.

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



10. 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.

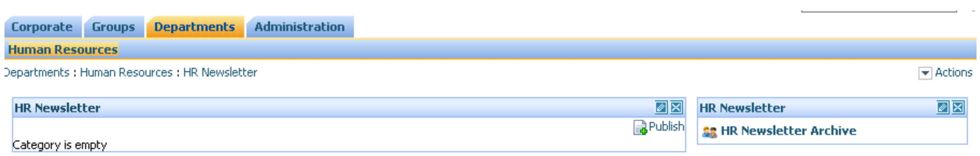
See also

Workflow Portlets

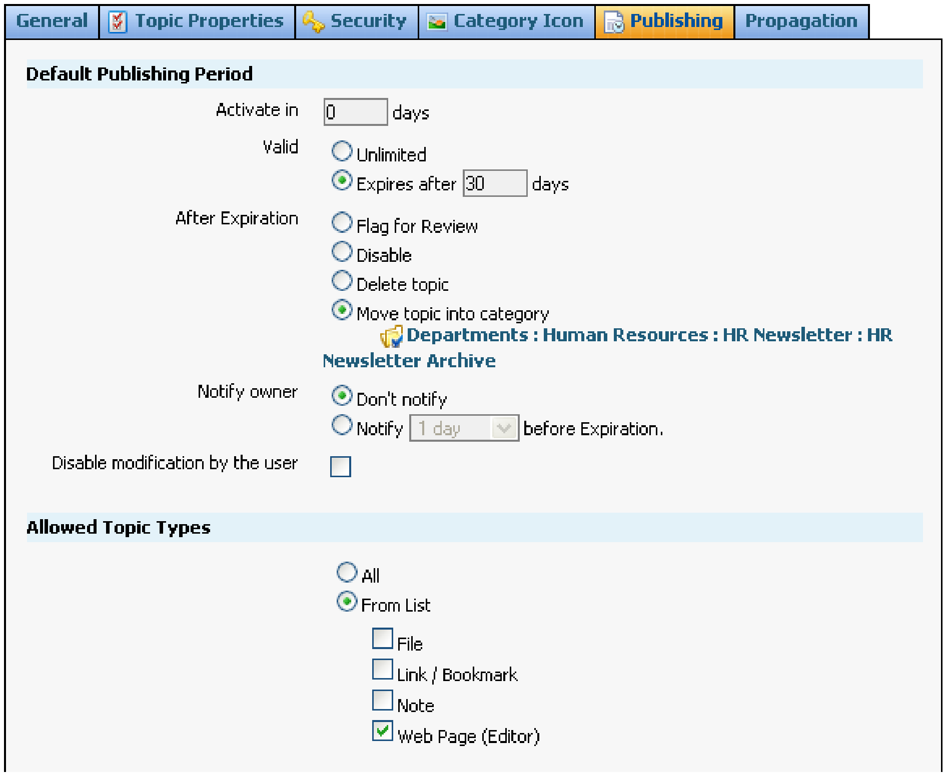
Document Lifecycle

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.

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.



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

Basic Document Approval
Advanced Document Approval Workflow
Topic Properties (Tags)
Make Your Documents Easier to Find

Home > Advanced Document Management > Topic Properties (Tags)

Topic Properties (Tags)

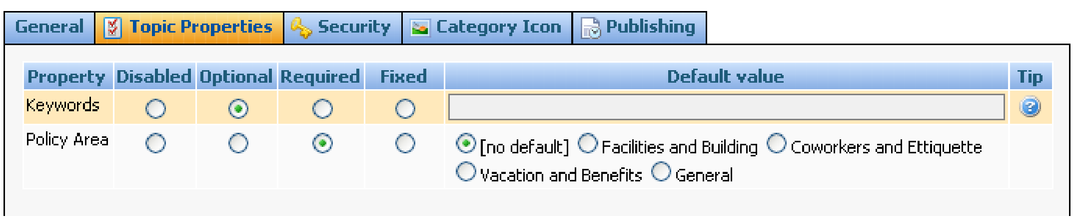
Topic Properties (also called Tags) allow you to classify and structure your documents in a more complex and flexible way than with categories alone. We will create two Topic Properties for use in the HR Department category. The first will be a keyword list that users may add to to help tag documents.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

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

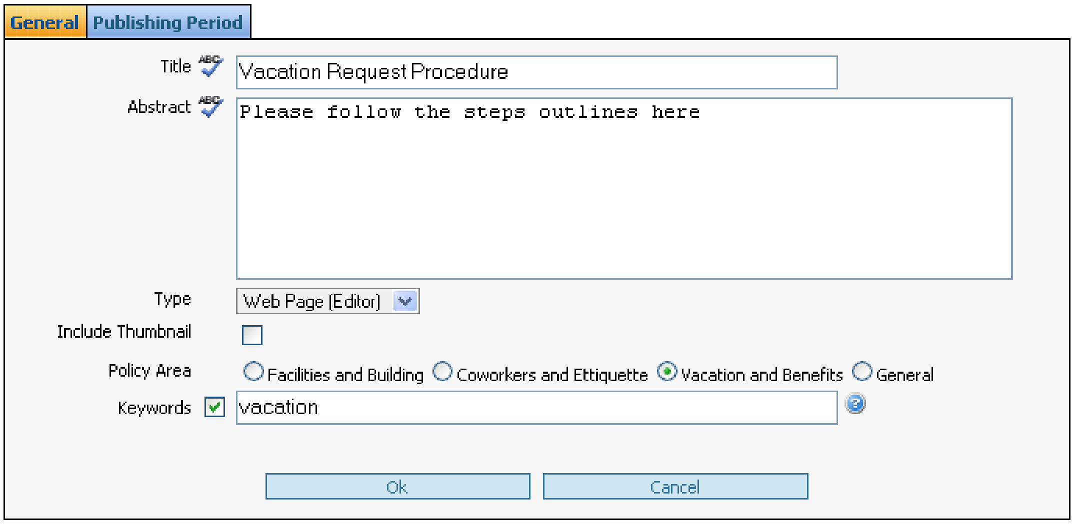
Now that you have created the Topic Properties, we need to associate them with the Policies category.

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



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)



See also

Basic Document Approval
Advanced Document Approval Workflow
Document Lifecycle
Make Your Documents Easier to Find

Home > Advanced Document 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

Basic Document Approval
Advanced Document Approval Workflow
Document Lifecycle
Topic Properties (Tags)

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
Advanced Document Management
Communities
Integrating Outside Resources
Branding

Home > Working with Applications > Create a Permissions Profile

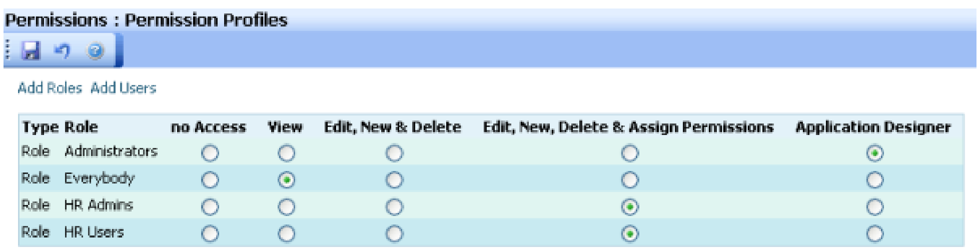
Create a Permissions Profile

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 

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.



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

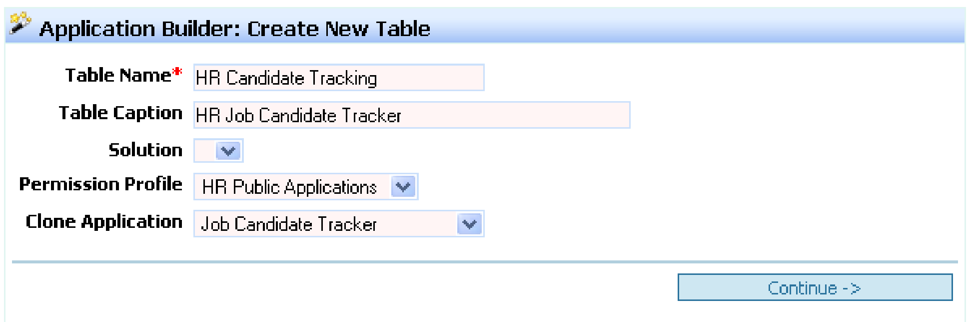
Home > Working with Applications > Create the Job Candidate Tracker Database

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.

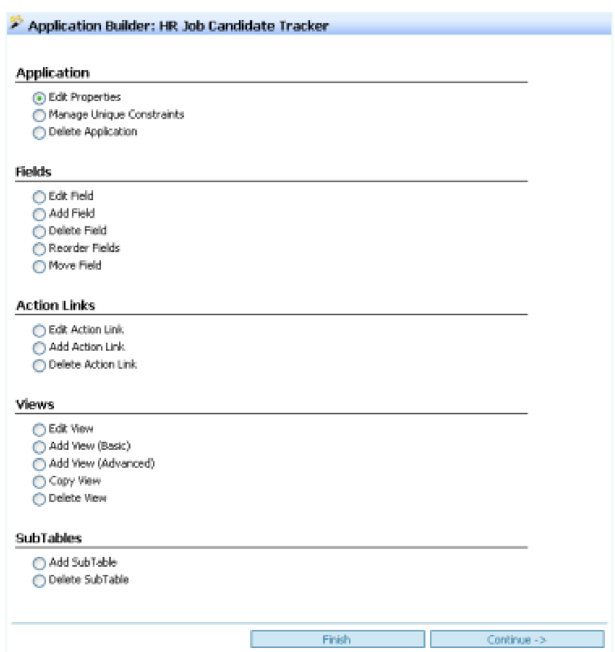
1. Navigate to the Administration portal
2. Click the Application Builder icon 

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



9. Click Continue on the next screen

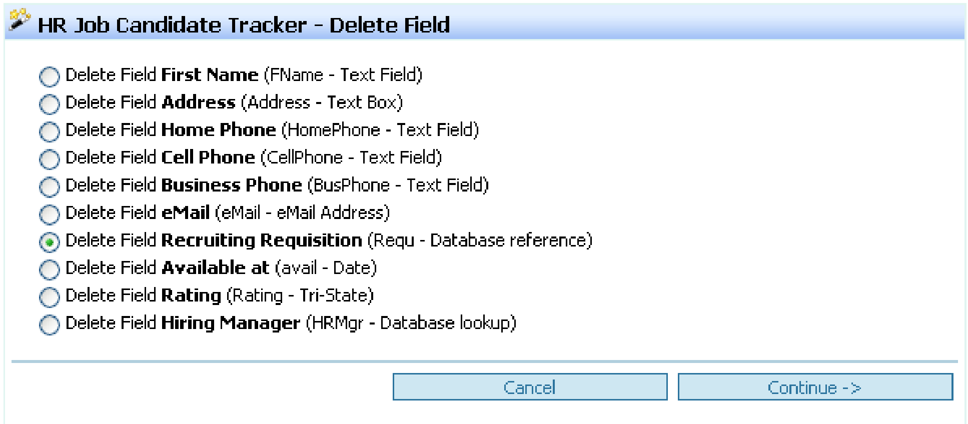
You are now in the main Application Builder menu and can perform all necessary actions for customizing and extending your application.



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

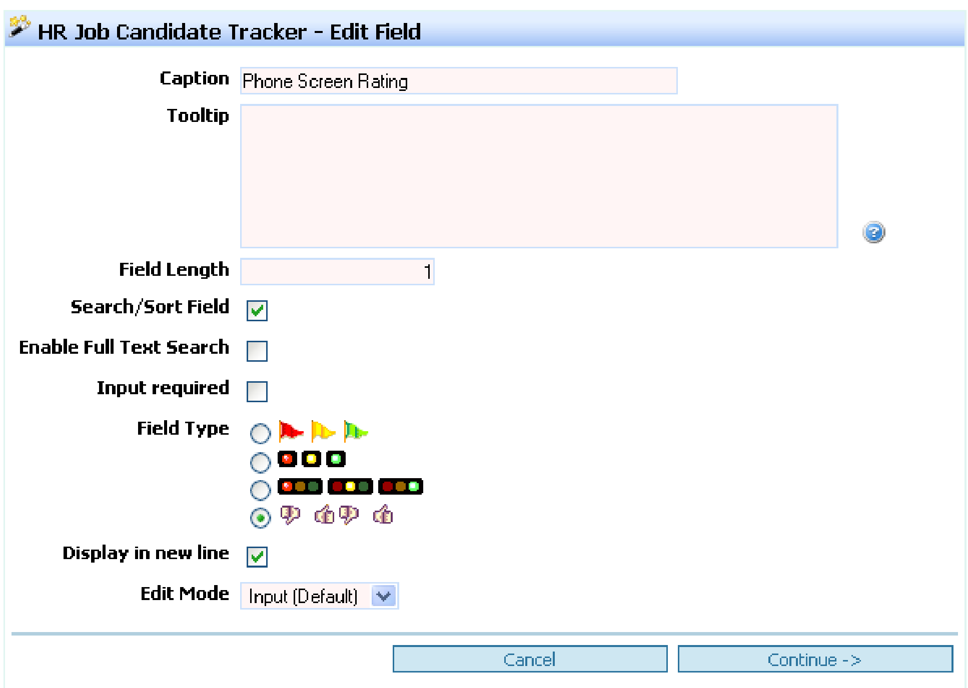
We will now customize this template to meet our specific needs. First, we will remove unnecessary fields.



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

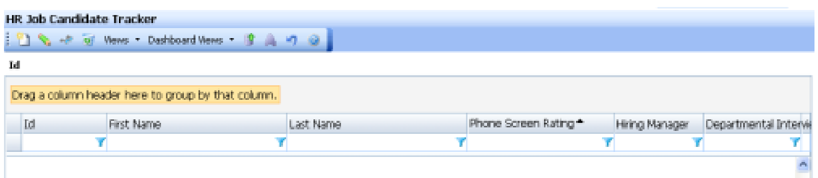
1. Check Edit Field and click Continue
2. Check Rating and click Continue



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.



See also

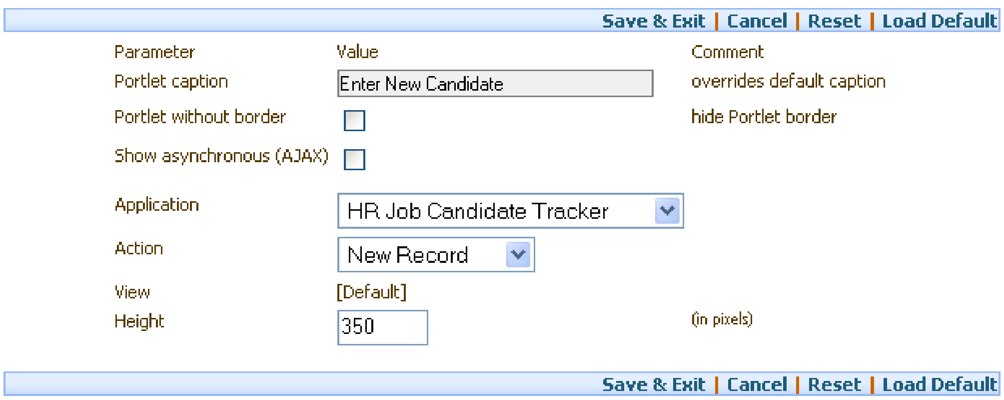
Create a Permissions Profile
Add Application Portlets
Working with the Application
Create an Application Workflow
Edit the Application
Test the Application Workflow

Home > Working with Applications > Add Application Portlets

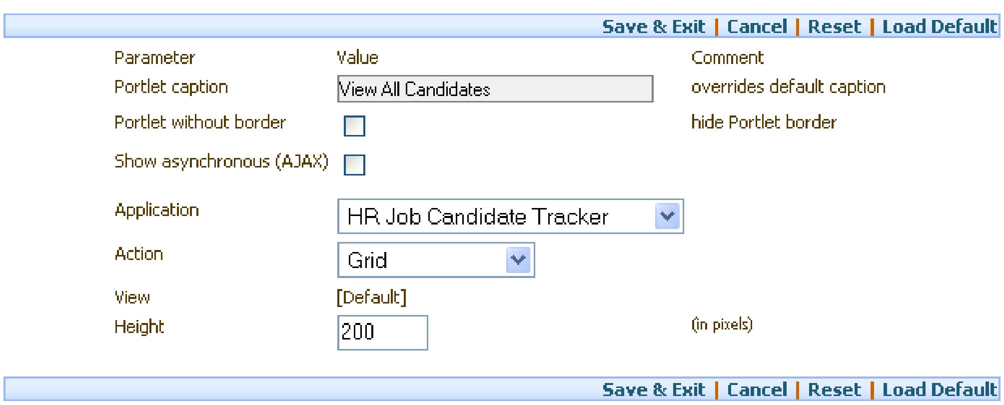
Add Application Portlets

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

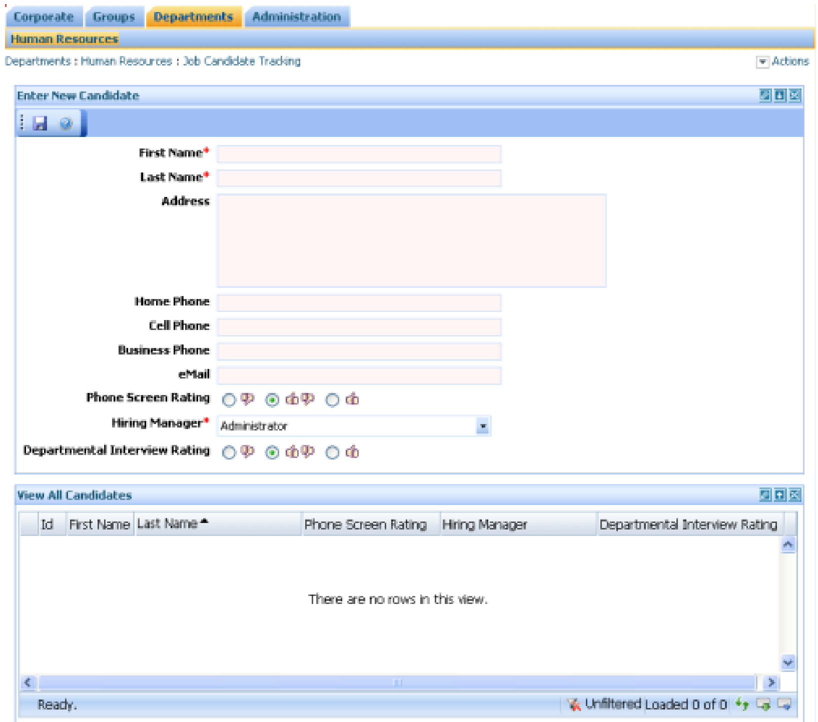
1. Navigate to the HR Department Home Site
2. Select Actions > Add subcategory
3. Enter `Job Candidate Tracking` as the Page Title
4. Click on the Security tab
5. Since we want this to be only be visible for members of the HR Department, set Everybody to no Access. Because there will be no documents 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 & 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`



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`



23. Click Save & Exit



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

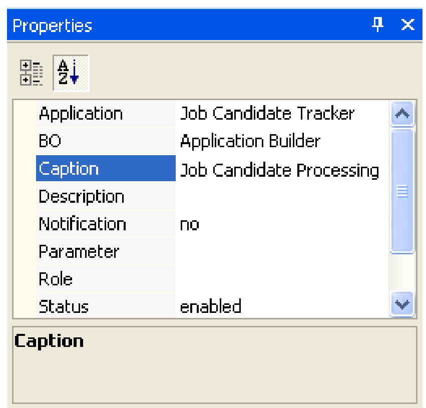
As mentioned in the section on creating a Document Approval Workflow, you can also create Workflows for Applications. These types of Workflows ensure that when many people need to participate in an application (for example a Vacation Request or our Job Candidate Tracker) and take specific actions, they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

Design the Workflow

1. Open the Workflow Designer an 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

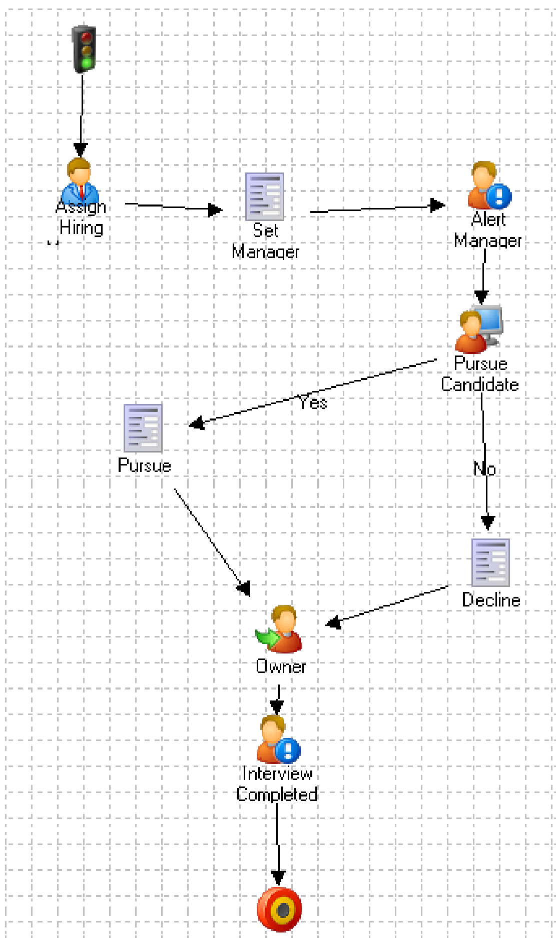


6. Add a User action to the process.
7. In the User action properties, enter `Assign Hiring Manager` as the Caption
8. Select User Selection for Mode
9. Set Override to Yes.

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. 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.
24. Enter Pursue as the Caption
25. Select Departmental Interview Rating as the Field.
26. Enter 3 for the NewValue. Because Interview is a Tri-Value Filed, 3 = thumbs up.

27. Add another Set Field Value action.
28. Enter Decline as the Caption.
29. Select Departmental Interview Rating as the Field.
30. Enter 1 for the NewValue.
31. Now draw a transformation from the Decision action to each of the possible Field Value outcome actions.
32. Select the transformation from Pursue Candidate to Pursue.
33. Enter Yes for the Caption.
34. Select the transformation from Pursue Candidate to Decline.
35. Enter No for the Caption.
36. 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.
37. Add an Information action to the process.
38. Enter Interview Completed as the Caption.
39. Enter The Hiring Manager has Completed the Interview and Rated the Candidate as the Description.
40. Draw a transformation from the Pursue action to the Transfer to Owner action.
41. Draw a transformation from the Decline action to the Transfer to Owner action.
42. Draw a transformation from the Transfer to Owner action to the Information action.
43. 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. Select the parent category for your Community by clicking [Parent Category] then click on Groups.

It is common to place all Community sites within a single portal called Groups, Communities or Communities.

1. Click Continue.
2. Enter Intranet Building Team as the Caption
3. Select Administrators as the Administration role for this Community and click Continue.
4. 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 be 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 Groups 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
Advanced Document Management
Working with Applications
Integrating Outside Resources

Branding

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
Advanced Document Management
Working with Applications
Communities
Branding

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

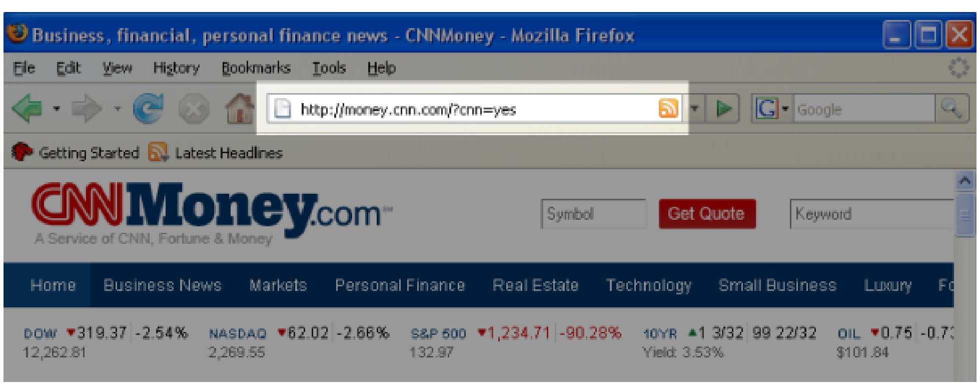
If you want to skip this section, just use http://rss.cnn.com/rss/money_topstories.rss
We will be using CNN in this example, but the same method can be used with any website that supports RSS.

In Internet Explorer 7

1. Open Internet Explorer and navigate to cnn.com
2. Click on the link for the Business section
3. Note that the RSS icon in the toolbar is now enabled (it is orange)
4. Click the RSS icon to display the RSS feed data.
5. Select the feed address from the address bar. CTRL+C to copy it.

In Firefox 2

1. Open Firefox and navigate to CNN.com
2. Click on the link for the Business section
3. Note that the orange RSS icon now appears in the address bar.
4. Click on the icon and select Subscribe to 'CNN Money Top Stories [RSS]'
5. Select the feed address from the address bar. CTRL+C to copy it.



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 Internet News 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 Internet News
15. Add the CNN Business portlet to the narrow side of the page.
16. Click Save & Exit.

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
Advanced Document Management
Working with Applications
Communities
Integrating Outside Resources

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.
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