intranomic

Getting Started Guide

Rev 2.5.0

February 2007

This document has been created to provide you with a "step by step" guide to the basic operation of IntraNomic.

Note: IntraNomic is shipped with a comprehensive "Help" system which includes "E-Learning" videos on specific topics. We recommend that you view the "Help" once you have read this guide.

Note: You can press the "F1" key from anywhere within IntraNomic to display the "Help".

Note: You must be using "Internet Explorer 6" (or higher) to receive all of the IntraNomic functionality. IntraNomic will operate in a "reduced functionality mode" on IE5 and IE5.5.

This document covers the following "step by step" guides:

Branding
Defining Your Profile
Defining Users
Defining Groups
Story Board – Categories
Story Board - Stories
Document Library - Folders
Document Library - Content
Document Library - Viewing Content
Discussion Forum - Folders
Discussion Forum - Forums
Discussion Forum - Entering a Post
Send "IM" Messages
Creating a "Private Conference Room"
Using "Global Search"
Using "Locate"

Branding

Branding

Within IntraNomic you have the following “branding” options:

- You can fix the colour scheme for everyone using IntraNomic
- You can provide a default colour scheme, which people can then override
- You can place your company logo or text within the “Active Portal”

The following steps show you how to change the IntraNomic “Colour Scheme” (you need to be an “IntraNomic Administrator”):

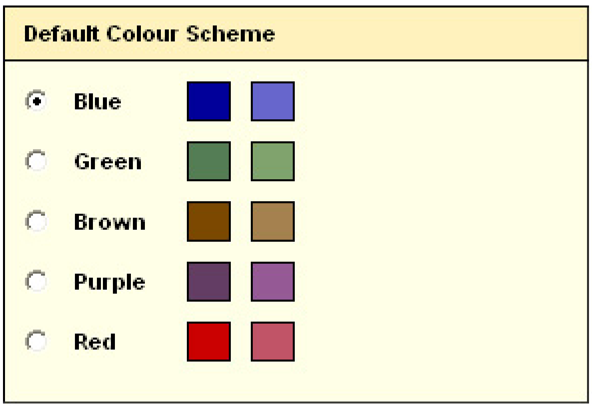
1) From within IntraNomic, select:
    a. “Menu” from the IntraNomic header
    b. Then the “Administration” option from the pull down menu
    c. Then the “Configuration” option from the pull down menu
    d. Then the “IntraNomic Configuration” option

2) Select the “Colour Scheme” tab

3) If you select “Yes” for the “Personalisation” input, then each person can override your default “colour scheme” via the “My Profile” option (within the “Personalisation” pull down menu)

4) If you select “No” for the “Personalisation” input, then each person cannot change your default “colour scheme”

5) The following “Default Colour Scheme” selection list allows you to select the default IntraNomic “colour scheme”:



6) Once you have entered this information you should press the “Save” button

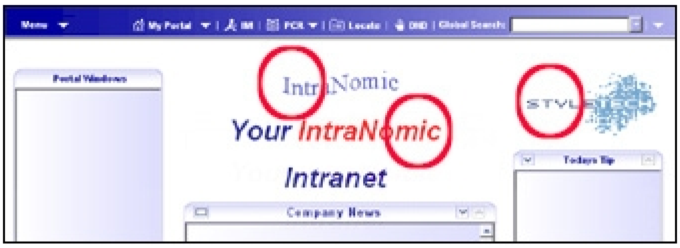
Note: You will need to “re-start” (or refresh) IntraNomic to see your new “Colour Scheme”.

The following steps show you how to set the “Logo(s)” within the “Active Portal” (you need to be an “IntraNomic Administrator”):

Note: To view the “Active Portal” you need to be using IE6 (or higher).

1) From within IntraNomic, select:
   a. “Menu” from the IntraNomic header
   b. Then the “Administration” option from the pull down menu
   c. Then the “Configuration” option from the pull down menu
   d. Then the “Portal Logo Configuration” option

2) Within the “Portal Logo Configuration” option you can change the “logo(s)” / “text” in the following “centre” and “right” column locations:



3) The “Portal Logo Configuration” option is split into the following tabs:

   a. Central Column
   b. Right Column

4) The “Central Column” tab, allows you to change the “logo” and / or “text” in the centre, whilst the “Right Column” tab allows you to change the “logo” shown the right

5) The following "logo" restrictions apply to the different columns:

<u>Centre Column:</u>

Width: 360px

Height: No Restriction

Format: JPEG, GIF or PNG

<u>Right Column:</u>

Width: 175px

Height: No Restriction

Format: JPEG, GIF or PNG

6) To display a "logo", you need to select the appropriate column tab, then make sure that the following "Display Logo" switch is "On":

7) Once the above switch is "On", you can select a "logo" by clicking on the following "Select File" icon:

7) Once you have selected your "logo" and / or "text" you should press the "Save" button

8) To remove a "logo" you should de-select the following "Display Logo" switch (you must still press the "Save" button):

Note: You will need to "re-start" (or refresh) IntraNomic to see your "logo" selection.

For more information on how to change the layout of the "Active Portal" please see the IntraNomic "Portal Windows Configuration" help topic.

Defining Your Profile

Defining Your Profile

The “Locate” (address book) module within IntraNomic contains a series of “Information Headings” (known as a “Profile”) (e.g. “Telephone Number / Extension” or “Position”):

Note: You can add an “Image” to an individuals “Profile” via within the IntraNomic Administrator “User / Group Maintenance” module “User Image” tab.

As each company has a different set of requirements for the “Profile” IntraNomic allows each company to define the “Information Headings” within their “Profile”.

When you first entered IntraNomic, you were prompted to complete your “Profile”. The “Profile” that you completed is a default “Profile” that is shipped with IntraNomic. This default “Profile” contains just the following two “Information Headings”:

Position
Telephone Number / Extension

Note: All new people will be asked to check and correct their “Profile” the first time they start IntraNomic.

Within the “Profile” you are allowed a maximum of twenty “Information Headings” (these can be changed at any time).

Note: You can force one person, several people or everyone to check and correct their “Profile” at any time. You can also use the “Import User / Group” module to import the “Profile” information from an external source (e.g. a personnel database).

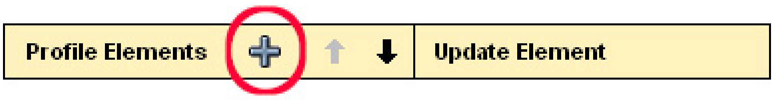
The following steps show you how to “Add” an “Information Heading” (you need to be an “IntraNomic Administrator”):

1) From within IntraNomic, select:
    a. “Menu” from the IntraNomic header
    b. Then the “Administration” option from the pull down menu
    c. Then the “User Profile” option

2) Select the “Definition” tab

3) The “List” on the left hand side of the screen shows the current “Information Headings” within the “Profile” (the entries shown in “Blue” means that each person must enter information against that “Information Heading” e.g. they are “Required”)

4) To “Add” an “Information Heading” click on the following “Add” icon:



5) Once the “Add” icon is clicked you can enter the following “Information Heading” details:

Element Name
Element Setting
Required
Element Type
Minimum Length (optional)
Maximum Length (optional)

Note: The “Element Setting” is normally “Editable” but can be “Read Only” if this information is imported from an external system (e.g. a personnel database) via the “Import User / Group” module.

6) Once you have entered this information you should press the “Save” button

7) You can view this new “Information Heading” by clicking on the “Locate” button within the IntraNomic header:

Note: If you entered an “Information Heading” that is “Required”, everyone will be forced to enter information for that “Information Heading” the next time they start IntraNomic.

To “Update” an “Information Heading” from within the “User Profile” option:

1) Select the required “Information Heading” from the list of “Information Headings”

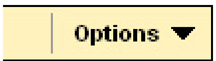
2) Make you changes on the right hand side of the screen

3) Press the “Save” button

To “Delete” an “Information Heading” from within the “User Profile” option:

1) Select the required “Information Heading” from the list of “Information Headings”

2) From the following “Options” dropdown select the “Delete Element” option:



Defining Users

Defining Users

When you start IntraNomic for the first time, you are asked to define the initial “User” of IntraNomic (e.g. this initial “User” is also the initial “IntraNomic Administrator” but this can be changed at any time).

People will only be allowed to access IntraNomic, if they are defined as a “User” within IntraNomic.

Note: You can use the “Import User / Group” module to import “Users” into IntraNomic from an external system (e.g. a personnel database).

The following steps show you how to “Add” a “User” (you need to be an “IntraNomic Administrator”):

1) From within IntraNomic, select:
    a. “Menu” from the IntraNomic header
    b. Then the “Administration” option from the pull down menu
    c. Then the “User / Group Maintenance” option

2) Select the “Users” tab (this tab should already be selected)

3) The “List” on the left hand side of the screen shows all of the current people defined to IntraNomic

4) To “Add” a “User” click on the following “Add” icon:

5) Once the “Add” icon is clicked you can enter the following “User” details:

Domain:	This should match the persons "Windows Network" domain. IntraNomic authentication will compare the entered "Domain" and "User Name" against the "Windows Network" login

User Name: This should match the persons "Windows Network" user name. IntraNomic authentication will compare the entered "Domain" and "User Name" against the "Windows Network" login

If you do not know the "Domain" or "User Name" of the new person, you can ask that person to start IntraNomic. IntraNomic will detect that the person does not have access and will display the following message which contains their "Domain" (before the "\" e.g. INTRANET) and "User Name" (after the "\" e.g. JOHNSMITH). Please ensure that any spaces within the "User Name" are entered correctly:

Last Name: Enter the last name of the person

First Name: Enter the first name of the person

Alias Name: The "Alias Name" is used to identify each person. The "Alias Name" must be unique and is shown in all the IntraNomic “People” selection lists. IntraNomic automatically generates the "Alias Name" by using a default format of "Last Name, First Name", but this can be changed. If two or more people share the same name within the organization, the "Alias Name" should be changed to make each person unique e.g. "Smith, John (Human Resources)" and "Smith, John (Purchasing)"

Groups: From the list of "Available Groups" select the groups that this person should belong to

The following “Groups” are pre-defined IntraNomic “Groups”:

Everyone:	Contains everyone within IntraNomic (read only)
Administrators:	These people are the IntraNomic Administrators
IM Enabled:	These people can send and receive IM messages
PCR Enabled:	These people can create a PCR room
Support:	These people receive client error information
Feedback:	These people receive any feedback via their portal
IntraNomic Alerts:	These people can send IntraNomic Alerts

Note: Groups can be added, updated and deleted via the "Groups" tab within the "User / Group Maintenance" module. Please see the “Defining Groups” section within this guide for more information.

6) Once you have entered this information you should press the “Save” button

7) You can view the newly entered person by clicking on the “Locate” button within the IntraNomic header:

To “Update” a “User” from within the “User / Group Maintenance” option:

1) Select the required person from the list of people

2) Make you changes on the right hand side of the screen

3) Press the “Save” button

To “Delete” a “User” from within the “User / Group Maintenance” option:

1) Select the required person from the list of people

2) From the following “Options” dropdown select the “Delete User” option:

Defining Groups

Defining “Groups”

IntraNomic advise that security for each IntraNomic module is defined by “Groups” rather than by individual people. For example, if the “Finance” group has access to certain “Folders” and a new “Finance” employee starts, it is easier to add that new employee to the “Finance” group rather than as an individual to all those “Folders” within IntraNomic. Using groups provides more security control and automatically allows new employees access to the information they require.

Note: You can use the “Import User / Group” module to import “Groups” into IntraNomic from an external system (e.g. a personnel database).

The following steps show you how to “Add” a “Group” (you need to be an “IntraNomic Administrator”):

1) From within IntraNomic, select:
    a. “Menu” from the IntraNomic header
    b. Then the “Administration” option from the pull down menu
    c. Then the “User / Group Maintenance” option

2) Select the “Groups” tab

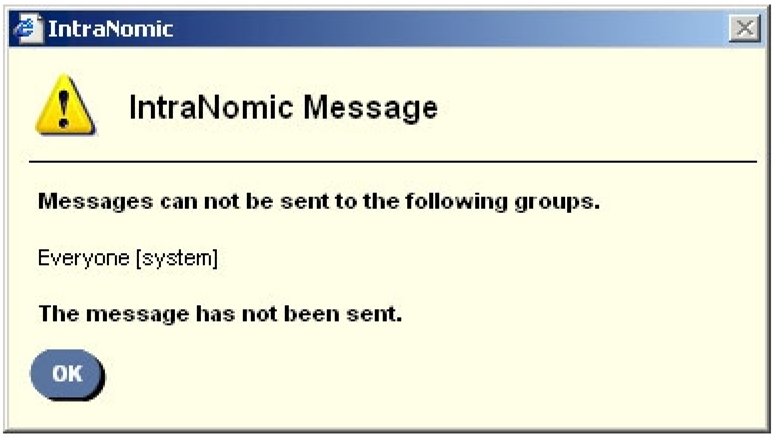
3) The “List” on the left hand side of the screen shows all of the current “Groups”

4) To “Add” a “Group” click on the following “Add” icon:

5) Once the “Add” icon is clicked you can enter the following “Group” details:

    Group Name
    Send IM to this Group
    Users (the people who will belong to this “Group”)

Note: You can send IM messages to a "Group", but you may want to block some "Groups" from being sent a message (e.g. the "Everyone Group"). If the "Send IM to this Group" switch is "OFF" for a "Group", and someone attempts to send an IM message to that "Group", they will receive the following message:



6) Once you have entered this information you should press the "Save" button

To "Update" a "Group" from within the "User / Group Maintenance" option:

1) Select the required "Group" from the list of "Groups"

2) Make you changes on the right hand side of the screen

3) Press the "Save" button

To "Delete" a "Group" from within the "User / Group Maintenance" option:

1) Select the required "Group" from the list of "Groups"

2) Click on the following "Delete Group" icon:

Story Board - Categories

Story Board - Categories

The "Story Board" module allows your organisation to publish stories of interest (this is usually accomplished via a printed company newsletter).

The IntraNomic Administrator first creates "Story Categories" (e.g. Company News, IT News, Manufacturing News etc).

Once the IntraNomic Administrator has created a "Story Category", it is the responsibility of the people defined to that "Story Category" to maintain the "Stories" within it.

When the IntraNomic "My Portal" module loads, each person is shown the "Stories" from the "Story Categories" that they have access to (e.g. a person in Manufacturing would not be shown a "Story" from within the "IT Story Category"):

Security within the "Story Board" module defines those people who are allowed to view or maintain the "Stories". The following "Security Roles" can be assigned to a "Category":

View: Those people, who are assigned the "View" security role to a "Category", can only view the "Stories" within that "Category".

Maintenance: Those people, who are assigned the "Maintenance" security role to a "Category", have the same security privilege as the "View" security role plus they can add, update and delete the "Stories" within that "Category".

Note: Those people who are not allocated a security role have no access to the "Category" and its "Stories".

The following steps show you how to “Add” a “Story Board Category” (you need to be an “IntraNomic Administrator”):

1) From within IntraNomic, select:
    a. “Menu” from the IntraNomic header
    b. Then the “Administration” option from the pull down menu
    c. Then the “Configuration” option from the pull down menu
    d. Then the “Modules” option from the pull down menu
    e. Then the “Story Board Configuration” option

2) The “List” on the left hand side of the screen shows all of the current “Categories”

3) To “Add” a “Category” click on the following “Add” icon:

4) Once the “Add” icon is clicked you can enter the following “Category” details:

    Category Name
    Description
    Approval
    Security

5) Once you have entered this information you should press the “Save” button. You should now see the new “Category” within the “List”

To “Update” a “Category” from within the “Story Board Configuration” option:

1) Select the required “Category” from the “List”

2) Make you changes on the right hand side of the screen

3) Press the “Save” button

To “Delete” a “Category” from within the “Story Board Configuration” option:

1) Select the required “Category” from the “List”

2) From the following “Options” dropdown select the “Remove Category” option:

Story Board - Stories

Story Board - Stories

If you have been allocated the “Maintenance” security role to a “Story Board Category” you will now have access to the “Story Board” module.

Note: You may need to restart IntraNomic to be shown the “Story Board” module option (within the IntraNomic pull down menu).

When "Stories" are added to the "Story Board" module (and "Approved", if required), those "Stories" are shown within the "My Portal" module (between the "Story Start Date" and "Story Remove Date"):

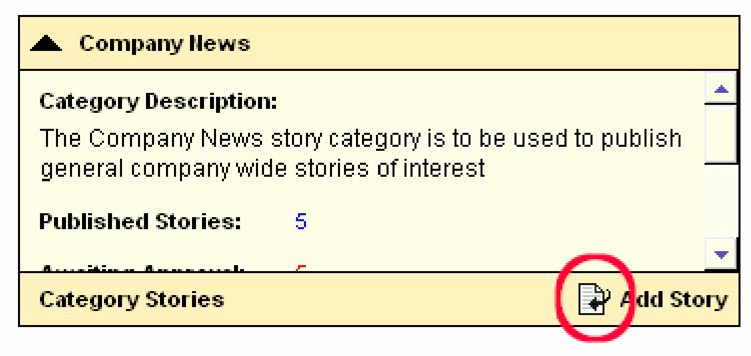
The following steps show you how to “Add” a “Story” to a “Story Board Category”:

1) From within IntraNomic, select:
   a. “Menu” from the IntraNomic header
   b. Then the “Story Board” option

2) Select the "Story Category" that is to contain your "New Story"

   Note: The "Story Board" module is split into two sides. The "Left" side contains a list of all the "Story Categories" were you have been granted the "Maintenance Security Role". Once you select a "Story Category", the "Stories" within that "Story Category" are shown on the "Right".

3) Once the required "Story Category" is selected, you should click on the following "Add Story" button:



6) Once the “Add” icon is clicked you can enter the following “Story” details:

Story Headline
Headline Picture
Start Date
Removal Date
Document Library Link (optional)
Discussion Forum Link (optional)
Story Summary
File Attachments (optional)

4) Once you have entered this information you should press the “Save” button. If this "Story" does NOT require "Approval" and its "Start Date" is set to today, this "Story" will be immediately displayed on the "My Portal" module

To “Update” a “Story” from within the “Story Board” option:

1) Select the required “Category” from the “List”

2) Locate the required “Story” from the list of stories for the selected “Category”

3) Press the “Update” button next to the required “Story” and make you changes to the “Story”

4) Press the “Save” button

To “Delete” a “Story” from within the “Story Board” option:

1) Select the required “Category” from the “List”

2) Locate the required “Story” from the list of stories for the selected “Category”

3) Press the “Update” button next to the required “Story”

4) From the following “Options” dropdown select the “Delete Story” option:

Document Library - Folders

Document Library - Folders

The “Document Library” module allows all of your “Content” (Word, Excel, PowerPoint and Videos etc.) to be stored in a central repository (location). It is common for an organization to store “Content” on local drives, network drives and within many inboxes. This makes sharing “Content” and finding the latest version of “Content” very difficult and very prone to error.

All “Content” stored within the "Document Library" module, must be stored within a “Folder”. The “Folder” hierarchy is displayed via the "Tree View". The use of “Folders” allow for similar “Content” to be grouped together.

Security within the "Document Library" module controls those people who are allowed to view or maintain “Content” and “Folders”. Security is defined against every “Folder”. The “Folder” security is then applied to all “Content” within that “Folder”. The following “Security Roles” can be assigned to a “Folder”:

View: Those people, who are assigned the "View" security role to a “Folder”, can only view the “Content” within that “Folder”.

Maintenance: Those people, who are assigned the "Maintenance" security role to a “Folder”, have the same security privilege as the "View" security role plus they can add, update and delete “Content” within that “Folder”.

Power: Those people, who are assigned the "Power" security role to a “Folder”, have the same security privilege as the "Maintenance" security role plus they can update and delete that “Folder” and create subfolders.

Note: Those people who are not allocated a security role have no access to the “Folder” and it’s “Content”.

The “Document Library” module is split into a “Browse” and “Maintenance” tabs. The “Browse” tab is used to view the “Folders” and “Content” while the “Maintenance” tab is used to maintain the “Folders” and “Content”.

Note: Only those people with a “Maintenance” or “Power” security role to a “Folder” are shown the “Maintenance” tab.

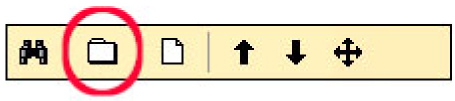
The following steps show you how to “Add” a “Folder” to the “Document Library” module:

5) From within IntraNomic, select:
    a. “Menu” from the IntraNomic header
    b. Then the “Document Library” option from the pull down menu

6) Select the “Maintenance” tab

7) The “Tree View” on the left hand side of the screen shows the “Folders” (and “Content”) were you have a “Folder” security clearance of “Maintenance” or “Power”

8) To “Add” a “Folder” click on the following “Add Folder” icon:



Note: The “New Folder” will be created below the currently selected “Folder” within the “Tree View”. If you have the “Document Library Root Folder” selected you will create a “Top Level Folder” (you will need to be an IntraNomic Administrator to create a “Top Level Folder”).

9) Once the “Add” icon is clicked you can enter the following “Folder” details:

Folder Name
Send Portal Notification
Description
Use Check In / Check Out
Content Retention
Security
Approval
Metadata
Search Terms

Note: Portal Notification’s are used to inform the relevant people of the new “Document Library Folder”.

10) Once you have entered this information you should press the “Save” button. You should now see the new “Folder” within the “Tree View” which is only visible to those with a defined security role

To “Update” a “Folder” from within the “Document Library” option:

5) Select the required “Folder” from the “Tree View” within the “Maintenance” tab

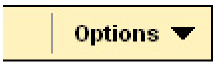
6) Make you changes on the right hand side of the screen

7) Press the “Save” button

To “Delete” a “Folder” from within the “Document Library” option:

5) Select the required “Folder” from the “Tree View” within the “Maintenance” tab

6) From the following “Options” dropdown select the “Delete Folder” option:



Note: You cannot delete a “Folder” if that “Folder” contains sub folders.

To make full use of the capabilities of a “Folder” within the IntraNomic “Document Library” module, you should read the “Document Library Folder Add” help topic, which covers:

a. Portal Notifications
b. Security Inheritance
c. Approval
d. Check In / Out
e. Metadata

Document Library - Content

Document Library - Content

The following types of “Content” can be stored within the "Document Library" module:

Import: "Import" allows for any type of file to be imported into the "Document Library" module (e.g. Word, Excel, PowerPoint etc). The IntraNomic Administrator has the capability to block "unsafe" file extensions (e.g. EXE) or files that are over a set file size (e.g. 50MB).

Editor: "Editor" allows for "free text" to be entered directly into the "Document Library" module via the "IntraNomic Editor". The "IntraNomic Editor" allows basic formatting such as font selection, bold, italic and underline but it is limited when compared to Microsoft Word.

Shortcuts: "Shortcuts" allow for links to be created to external “Content”. If “Content” is stored within an existing web application then a URL shortcut can be entered that points to that “Content” (e.g. video streaming). If “Content” is stored within your network then a UNC shortcut can be created to point to the “Content” (e.g. dynamically generated reports).

The following steps show you how to “Add Content” to the “Document Library” module:

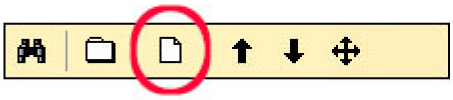
1) From within IntraNomic, select:
    c. “Menu” from the IntraNomic header
    d. Then the “Document Library” option from the pull down menu

2) Select the “Maintenance” tab

3) The “Tree View” on the left hand side of the screen shows the “Folders” (and “Content”) were you have a “Folder” security clearance of “Maintenance” or “Power”

4) Select the “Folder” that will contain this “New Content”

5) To “Add Content” click on the following “Add Content” icon:



6) Once the “Add” icon is clicked you can enter the following “Content” details:

   Name
   Publish Date (optional)
   Deletion Date (optional)
   Send Portal Notification
   Must Read Content
   Version Comments
   Description
   Metadata (defined within the containing “Folder”)
   Content Type (Import, Editor or Shortcut)

   Note: Portal Notification’s are used to inform the relevant people of the new “Document Library Content”.

7) If you select a “Content Type” of “Import” you can click on the following “Import File” icon to select the file to import:

8) Once you have entered this information you should press the “Save” button. You should now see your “Content” within the “Tree View”

To “Update Content” from within the “Document Library” option:

1) Select the required “Content” from the “Tree View” within the “Maintenance” tab

2) Make you changes on the right hand side of the screen

3) Press the “Save” button

To “Delete Content” from within the “Document Library” option:

1) Select the required “Content” from the “Tree View” within the “Maintenance” tab

2) From the following “Options” dropdown select the “Delete Content” option:

To make full use of the “Content” capabilities within the IntraNomic “Document Library” module, you should read the following “Document Library” help topics:

a. Version History
b. Journal
c. Office Integration

Document Library - Viewing Content

Document Library - Viewing Content

IntraNomic has many different methods to view “Content” from within the “Document Library” module, this document describes just a few.

The following steps show you how to “View Content” from within the “Document Library” module:

1) From within IntraNomic, select:
    a. “Menu” from the IntraNomic header
    b. Then the “Document Library” option from the pull down menu

2) Select the “Browse” tab (this tab should already be selected)

3) The “Tree View” on the left hand side of the screen shows all of the “Folders” (and “Content”) were you have a “Folder” security clearance of “View”, “Maintenance” or “Power”

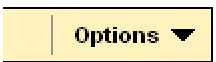
4) You can browse for “Content” by expanding the required “Folder” within the “Tree View” and clicking on the required “Content” to highlight it

    Note: If you double click on the required “Content” you will be shown that “Content”.

5) Once the “Content” is highlighted you are shown the “Content Details” on the right hand side of the screen

    Note: You can click on the following “View” button to view the actual “Content”:

Note: You can click on the following “Options” dropdown to view information such as “Who has viewed this content (Journal Summary)” and “Version History”:



6) You can also view “Content” by using the following “Search” button:

The “Search” button allows you to find a “Folder” or “Content” using Internet style “Search Criteria” (e.g. budget and 2006)

The following list contains other methods for “Viewing Content”, which can be explored via the IntraNomic help topics:

a. Global Search
b. Quick Links
c. Last 10 Viewed
d. Portal Notifications

Discussion Forum - Folders

Discussion Forum - Folders

The “Discussion Forum” module provides the facility for everyone or groups of people to voice an opinion. A “Forum” can be created to discuss a topic, statement, question or file. For example, a “Forum” could be created to discuss the “Possible improvements to a computer system” or an “Excel budget file” could be discussed by the finance department and the directors of the company.

Discussions can take place without arranging and attending lengthy meetings. You are able to view and discuss information at times that are convenient to you. Discussion forums are not intended to eliminate all meetings but they can reduce the number of meetings and make those meetings quicker and more productive.

If sensitive subjects are to be discussed, the “Forum” can be created as “Anonymous”, this means that no information about the person entering the post is stored.

Security within the "Discussion Forum" module controls those who are allowed to participate in or maintain “Forums” and “Folders”. Security is defined against every “Folder”. The “Folder” security is then applied to all “Forums” within that “Folder”. The following “Security Roles” can be assigned to a “Folder”:

Post: Those people, who are assigned the "Post" security role to a “Folder”, can view and enter posts into a “Forum” within that “Folder”.

Maintenance: Those people, who are assigned the "Maintenance" security role to a “Folder”, have the same security privilege as the "Post" security role plus they can add, update and delete “Forums” within that “Folder”.

Power: Those people, who are assigned the "Power" security role to a “Folder”, have the same security privilege as the "Maintenance" security role plus they can update and delete that “Folder” and create subfolders.

Note: Those people who are not allocated to a security role have no access to the “Folder” and its “Forums”.

To avoid inaccurate or offending “Posts” within a “Forum”, the “Forum” can be created so every “Post” will need to be approved before being published. Those people with the “Power” security clearance to a “Folder” can delete a “Post” from any “Forum” within that “Folder”.

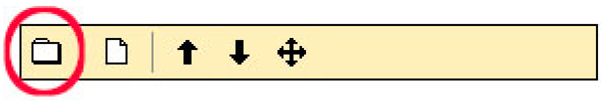
The following steps show you how to “Add” a “Folder” to the “Discussion Forum” module:

1) From within IntraNomic, select:
    a. “Menu” from the IntraNomic header
    b. Then the “Discussion Forum” option from the pull down menu

2) Select the “Maintenance” tab

3) The “Tree View” on the left hand side of the screen shows all the “Folders” (and “Forums”) were you have a “Folder” security clearance of “Maintenance” or “Power”

4) To “Add” a “Folder” click on the following “Add Folder” icon:



Note: The “New Folder” will be created below the current selected “Folder” within the “Tree View”. If you have the “Discussion Forum Root Folder” selected you will create a “Top Level Folder” (you will need to be an IntraNomic Administrator to create a “Top Level Folder”).

5) Once the “Add” icon is clicked you can enter the following “Folder” details:

Folder Name
Send Portal Notification
Description
Security
Approval
Search Terms

Note: Portal Notification’s are used to inform the relevant people of the new “Discussion Forum Folder”.

6) Once you have entered this information you should press the “Save” button. You should now see the new “Folder” within the “Tree View” which is only visible to those with a defined security role

To “Update” a “Folder” from within the “Discussion Forum” option:

1) Select the required “Folder” from the “Tree View” within the “Maintenance” tab

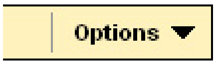
2) Make you changes on the right hand side of the screen

3) Press the “Save” button

To “Delete” a “Folder” from within the “Discussion Forum” option:

1) Select the required “Folder” from the “Tree View” within the “Maintenance” tab

2) From the following “Options” dropdown select the “Delete Folder” option:



Note: You cannot delete a “Folder” if that “Folder” contains sub folders.

To make full use of the capabilities of a “Folder” within the IntraNomic “Discussion Forum” module, you should read the “Discussion Forum Folder Add” help topic, which covers:

a. Portal Notifications
b. Security Inheritance
c. Approval

Discussion Forum - Forums

Discussion Forum - Forums

The following steps show you how to “Add a Forum” to the “Discussion Forum” module:

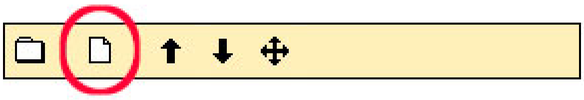
1) From within IntraNomic, select:
   a. “Menu” from the IntraNomic header
   b. Then the “Discussion Forum” option from the pull down menu

2) Select the “Maintenance” tab

3) The “Tree View” on the left hand side of the screen shows the “Folders” (and “Forums”) were you have a “Folder” security clearance of “Maintenance” or “Power”

4) Select the “Folder” that you want to “Add” the “Forum” to

5) To “Add a Forum” click on the following “Add Forum” icon:



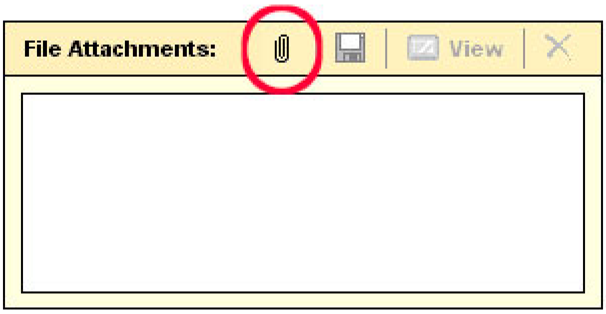
6) Once the “Add” icon is clicked you can enter the following “Forum” details:

Forum Name
Forum Deactivation Date (optional)
Send Portal Notification
Make Forum Anonymous
Forum Details
File Attachments

Note: Portal Notification’s are used to inform the relevant people of the new “Forum” within the “Discussion Forum” module.

7) You enter the “Forum Details” via the IntraNomic Editor”, the “Forum Details” should contain your topic, statement, question etc.

8) If you are going to attach one or more "Files" to the "Forum" you can click on the following "Attach Files" icon:



9) Once you have entered this information you should press the "Save" button. You should now see the "Forum" within the "Tree View"

You can only update a "Forum" whilst no "Posts" are entered into that "Forum" (the "Forum" then becomes locked). To "Update a Forum" from within the "Discussion Forum" option:

1) Select the required "Forum" from the "Tree View" within the "Maintenance" tab

2) Make you changes on the right hand side of the screen

3) Press the "Save" button

To "Delete a Forum" from within the "Discussion Forum" option:

1) Select the required "Forum" from the "Tree View" within the "Maintenance" tab

2) From the following "Options" dropdown select the "Delete Forum" option:

To make full use of the “Forum” capabilities within the IntraNomic “Discussion Forum” module, you should read the following “Discussion Forum” help topics:

a. Activate / Deactivate Forum
b. Anonymous Forums
c. Approvals

Discussion Forum - Entering a Post

Discussion Forum - Entering a Post

The following steps show you how to “Add a Post” to a “Forum” within the “Discussion Forum” module:

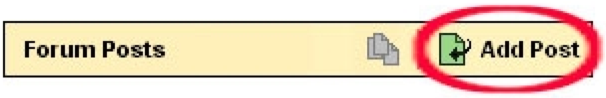
1) From within IntraNomic, select:
    a. “Menu” from the IntraNomic header
    b. Then the “Discussion Forum” option from the pull down menu

2) Select the “Browse” tab (this tab should already be selected)

3) The “Tree View” on the left hand side of the screen shows the “Folders” (and “Forums”) were you have a “Folder” security clearance of “Post”, “Maintenance” or “Power”

4) Select the “Forum” that you want to “Add a Post” to

5) Click on the following “Add Post” icon:

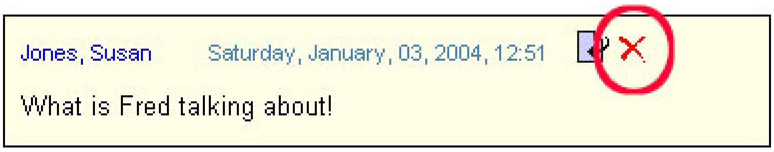


6) Once you click on the “Add Post” icon, you are shown the “IntraNomic Editor”. The "IntraNomic Editor" allows basic formatting such as font selection, bold, italic and underline but it is limited when compared to Microsoft Word

7) Once you have entered your “Post”, you can save your “Post” by clicking on the “Confirm” button within the “IntraNomic Editor”

    Note: Portal Notification’s are used to inform the relevant people of the new “Discussion Forum Post”.

Note: If a “Post” is incorrect or offensive only someone with the "Power" security role can remove it (assuming that the “Post” has already been approved). A person, who has been allocated the "Power" security role, will be shown the following "Remove Post" icon next to each post:



Send “IM” Messages

Send “IM” Messages

The “IntraNomic Messenger” module enables short, informal, two-way discussions to take place. The “IntraNomic Messenger” module allows you to quickly ask questions, send attachments and get instant replies.

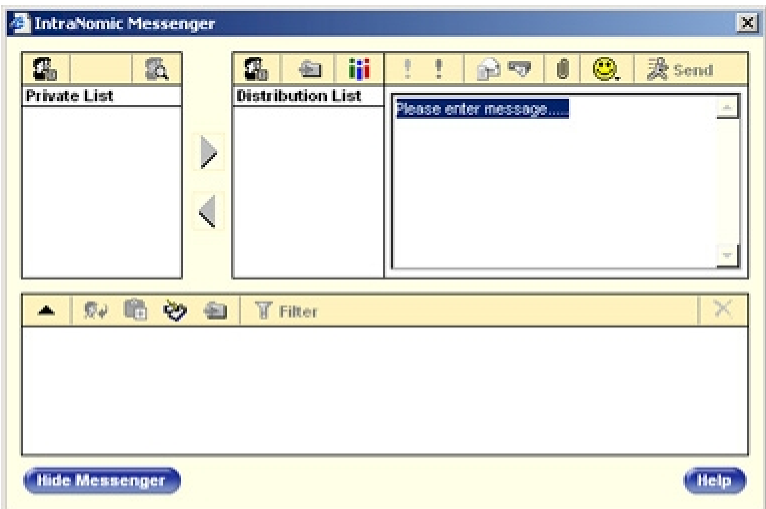
You can send a message via the “IntraNomic Messenger” module to any combination of people and group(s).

Once a message within the “IntraNomic Messenger” module has been read, the message will NOT be saved once IntraNomic is closed. Any important messages that should be kept can be saved to the “My Portal” module or copied to the Windows clipboard. Any attachments that should be kept can be saved to a local / network drive.

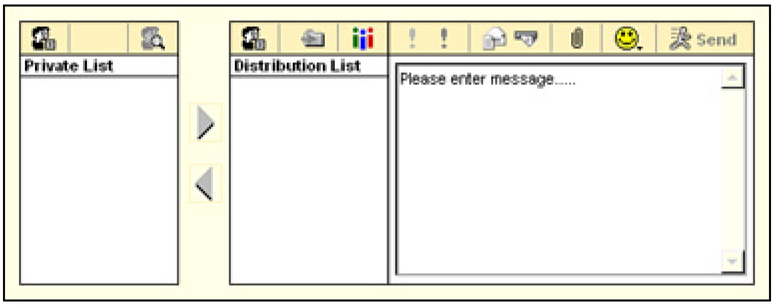
The “IntraNomic Messenger” module is ideal for asking questions and holding a short discussion between two people. If the discussion involves more people, then the discussion should take place within the “Private Conference Room” or “Discussion Forum” modules.

You can view the “IntraNomic Messenger” module by clicking on the following “IM” button within the IntraNomic header:

Once the “IM” button is clicked, you are shown the following “IM” screen:



The “IM” screen is split into “Send” and “Receive” sections. The following graphic shows the “Send” section:



Note: Within the “Private List” you can store the people and groups that you most frequently send messages to. Every time you start IntraNomic, the “Private List” will contain your selected people and groups.

The following steps show you how to “Send an Message”:

1) You can “Add” or “Remove” a “Person / Group” from the “Distribution List” by clicking on the following “Select” icon:

2) When a person is selected into the “Distribution List”, that person will either have a “Green”, “Red” or “Amber” icon next to their name:

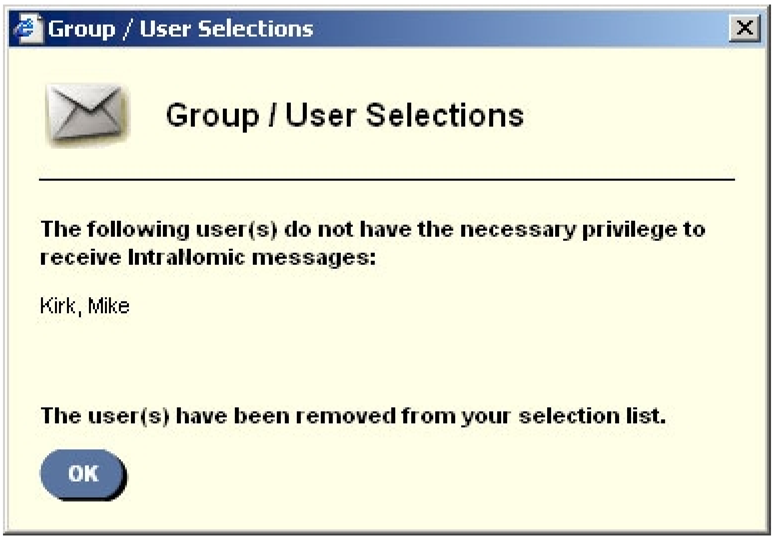
   - The “Green” icon indicates that the person is logged into IntraNomic

   - The “Amber” icon indicates that the person has the “Do Not Disturb” option switched on. If you leave the mouse pointer over the amber icon you will be shown a tool tip containing the reason for the “Do Not Disturb”

   - The “Red” icon indicates that the person is not logged into IntraNomic

   Note: As someone logs into or out of IntraNomic or the "Do Not Disturb" option is switch on or off, the green, amber and red icons shown within the “Distribution List” are automatically updated.

3) If any of the people within the “Distribution List” are not within the “IM Enabled” group, you will receive the following message:



Note: People must be granted security clearance to use the “IntraNomic Messenger” module by being included in the “IM Enabled” group.

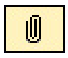
4) If a person is not logged into IntraNomic (red icon), any messages that are sent to that person will be stored. When that person next logs into IntraNomic, those stored message will be automatically displayed

5) Once the “Distribution List” has been populated, the “Message Contents” should be entered into the following area:

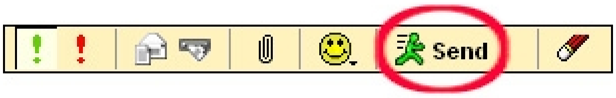
Note: You can optionally select the following “Delivery Receipt”:

Note: You can optionally select the following “Read Receipt”:

6) You can “Add” attachments to your “Message” by clicking on the following “Attachment” icon:



7) Once the “Distribution List”, “Message Content” and “Message Switches” have been set, the following "Send" icon should be clicked to send the message:



Note: When your “Message” is sent, the message will be displayed in the receive section of your “IntraNomic Messenger” module.

To make full use of the capabilities of the “IntraNomic Messenger” module, you should read the following “IntraNomic Messenger” help topics:

a. Receiving a Message
b. Do Not Disturb
c. Notification Window
d. Filter Message

Creating a
"Private Conference Room"

Creating a "Private Conference Room"

The "Private Conference Room" module allows for fast (real time) and focused discussions between two or more people.

The "IntraNomic Messenger" module is ideal for asking questions and holding a short discussion between two people. If the discussion being raised involves more people then the discussion should take place within the "Private Conference Room" module.

Note: A maximum of 10 people can participate within a "Private Conference Room".

The contents of a "Private Conference Room" are lost when the originator closes the "Room" unless the originator decides to convert the "Room" into a "Forum" within the "Discussion Forum" module.

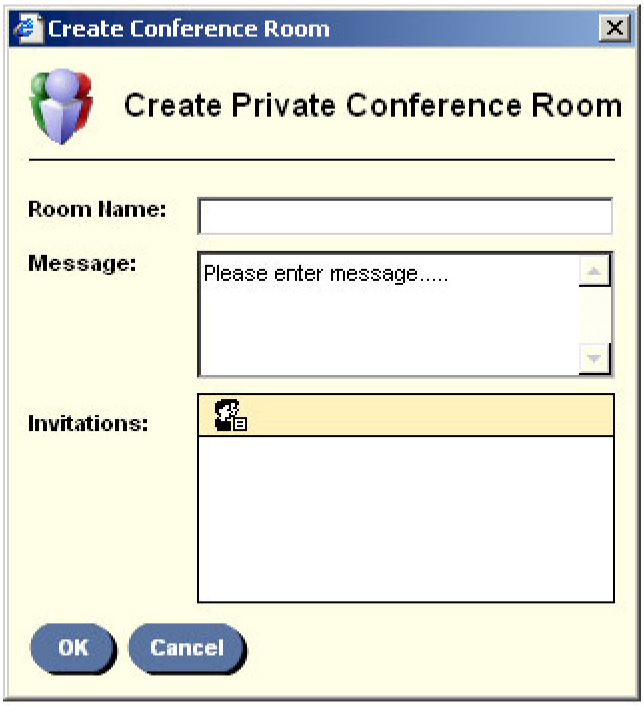
You can view the "Private Conference Room" module by clicking on the following "PCR" button within the IntraNomic header:

Once the "PCR" button is clicked, you are shown a menu containing the "Rooms" that you are currently participating in. If you belong to the "PCR Enabled" group, you will also be shown the "Create Conference Room" option:

The following steps show you how to “Create a Private Conference Room” from the “Private Conference Room” module:

1) You should select the “Create Conference Room” menu option

2) Once you select the “Create Conference Room” you will be shown the following “Create Private Conference Room” window:



3) The “Create Private Conference Room” window requires the following inputs:

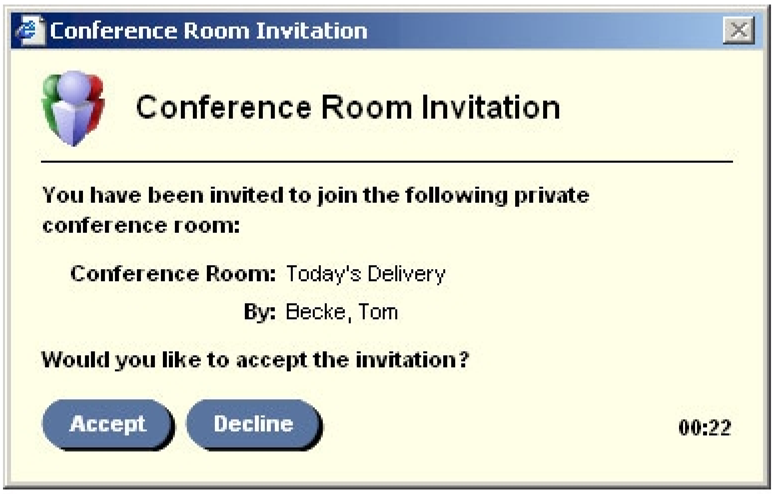
Room Name:	A meaningful name to describe the “Room”
Message:	The initial message that each participant is shown
Invitations:	The people who will participate within the “Room”

Note: When selecting the people to participate within the “Room” you are only shown the people who are currently logged into IntraNomic.

Note: People can be “Added” or “Removed” from a “Room” at any time.

Note: The person who creates the “Room” is known as the “Originator” and they are the only person who can “Add” or “Remove” people from the “Room”.

4) Once the “OK” button is clicked, everyone within the “Invitations” section will receive the following invitation:



Note: Each person has 30 seconds to accept or decline the invitation. If after 30 seconds the person fails to accept or decline the invitation, the invitation is automatically declined and the originator of the “Private Conference Room” is informed.

5) If the person accepts the invitation to join the “Private Conference Room”, all of the people within the “Room” are informed:

To make full use of the capabilities of the “Private Conference Room” module, you should read the following “Private Conference Room” help topics:

a. Sending a Message
b. Receiving a Message
c. Add / Remove a User
d. Do Not Disturb
e. Hide / Display a Room
f. Notification Window
g. Discussion Forum

Using "Global Search"

Using “Global Search”

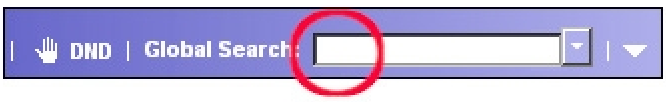
The “Global Search” module allows you to quickly and easily search all of the following IntraNomic modules:

a. Document Library
b. Discussion Forum
c. Help
d. Locate

Note: You can extend the “Global Search” module to also search your selected “Network Shares” (without any programming knowledge), for more information please see the IntraNomic “Extend Global Search” help topic.

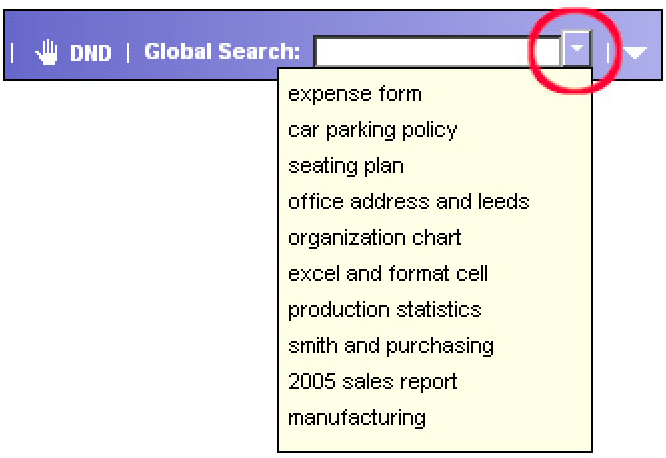
Note: If you have programming knowledge you can also extend the “Global Search” module to search within your application databases and other “Search Indexes”.

You can input “Search Criteria” into the “Global Search” module via the IntraNomic header:



To perform a global search, enter your “Search Criteria” into the input box. Once you have entered your “Search Criteria”, you should press the "Enter" key to perform the search.

To view your last ten “Search Criteria” you can either double click within the “Search Criteria” input box or click on the following “Selection” icon:



Note: If you select one of your previous “Search Criteria” entries you should then press the “Enter” key to perform the search.

The “Search Criteria” is similar to entering an Internet search. The following are valid “Search Criteria” examples:

1. budget and june and 2003
2. june or july
3. “audit procedure”
4. “audit procedure” and manufacturing
5. policy document

To search for a phrase, the phrase must be enclosed within double quotation marks (e.g. “AUDIT PROCEDURE”).

The conditional words of AND / OR can be used to refine the “Search Criteria”.

If a space is left between two words or phrases (e.g. POLICY DOCUMENT), the search will assume that the AND condition should be used (e.g. POLICY **AND** DOCUMENT).

Note: The search is **NOT** case sensitive e.g. expense is the same as Expense or EXPENSE.

The fully expanded “Search Criteria” is shown above the search results:

Search results for: *"policy document" AND manufacturing*

Note: You are only shown the search results which you have been granted security to.

The following example shows the results of a “Global Search” for “expense report”:

The results are split into “IntraNomic Modules”, “Network Shares” and “Search Add-ons”, the “IntraNomic Modules” are shown in black and the “Network Shares” and “Search Add-ons” are shown in blue.

You can expand each “IntraNomic Module”, “Network Share” and “Search Add-on” to view the corresponding search results. If you then click on a search result you will be shown its expanded details.

Note: All of the IntraNomic searches look within the following file types:

- Word
- Excel
- PowerPoint
- Text
- HTML
- PDF

Using “Locate”

Using “Locate”

The “Locate” module is the IntraNomic “Address Book”. The “Locate” module enables you to quickly view other peoples “Profile” information.

Note: The information contained within a “Profile” is determined by the IntraNomic Administrator.

You can find the required person by either locating their name from the list of people within the “Locate” module or by entering “Search Criteria”.

The following steps show you how to “View” another person’s “Profile” from the “Locate” module:

1) To access the “Locate” module, click on the following “Locate” button within the IntraNomic header:

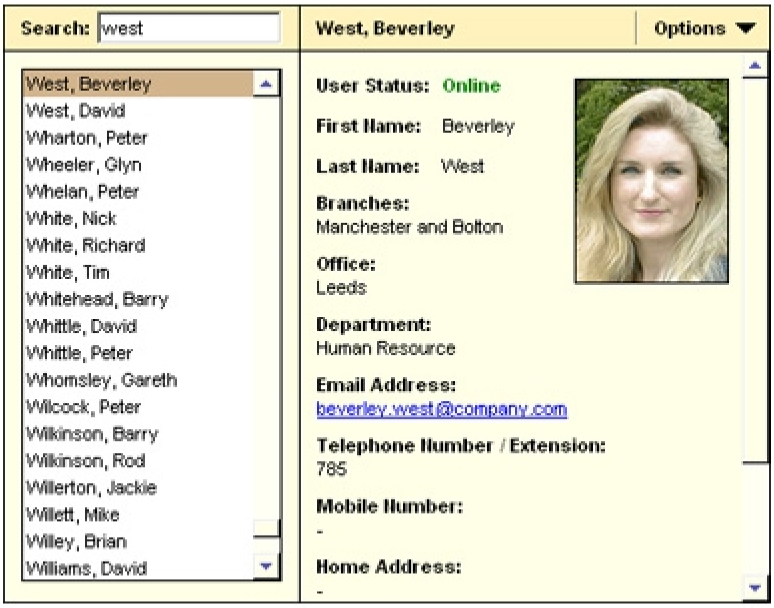
2) Select the “Locate User” tab (this tab should already be selected)

3) You can view a person’s “Profile”, by either:

    a. Scrolling through the list of people shown and clicking on the required person

    b. Typing the person’s name into the search area, as you type the nearest matching name is automatically selected

4) Once a person is selected, their “Profile” and image (if available) are shown:



Note: The “Information Headings” within the “Profile” (e.g. Branches, Office, Department etc. are defined by the IntraNomic Administrator).

5) Once a “Profile” is shown, you can:

a. Send that person an “IM” message

b. Send that person a “Portal” message

c. Copy their “Profile” to the Windows clipboard

The following steps show you how to search for people using “Search Criteria” (e.g. “mangers” or “managers and London”) within the “Locate” module:

1) To access the “Locate” module, click on the following “Locate” button within the IntraNomic header:

2) Select the “Advanced Search” tab

3) Enter your “Search Criteria” (the “Search Criteria” is similar to entering an Internet search) and press “Enter”.

   The following are valid “Search Criteria” examples:

   1. purchasing and london and spares
   2. bloggs or smith
   3. "human resource"
   4. "human resource" and jones
   5. john smith

   To search for a phrase, the phrase must be enclosed within double quotation marks (e.g. “HUMAN RESOURCE”).

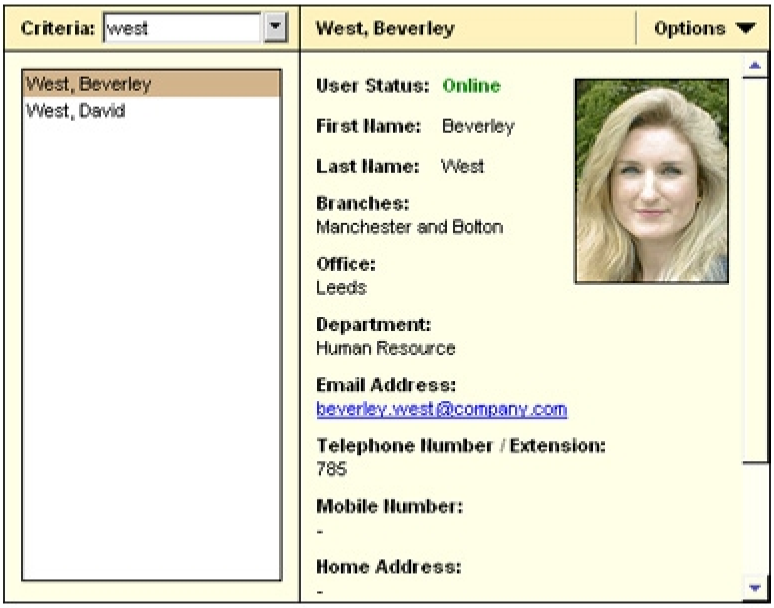
   The conditional words of AND / OR can be used to refine the “Search Criteria”.

   If a space is left between two words or phrases (e.g. JOHN SMITH), the search will assume that the AND condition should be used (e.g. JOHN **AND** SMITH).

   Note: The search is **NOT** case sensitive e.g. expense is the same as Expense or EXPENSE.

4) The results of the search are shown in alphabetic order

5) If you click on the required person, that person will be selected. Once a person is selected, their “Profile” and image (if available) are shown:



Note: The “Information Headings” within the “Profile” (e.g. Branches, Office, Department etc. are defined by the IntraNomic Administrator).

6) Once a “Profile” is shown, you can:

a. Send that person an “IM” message

b. Send that person a “Portal” message

c. Copy their “Profile” to the Windows clipboard

End of the

“Getting Started Guide”