PORTAL-X

User's Guide

What is PortalX?

- In small-medium sized businesses, it is difficult to produce and operate an interface for internal communication. PortalX was designed to meet this need and contribute to business efficiency.
- A simplified management interface has been added to perform LDAP/Active Directory operations within PortalX.
- The PortalX is designed to be usable immediately after installation. It requires minimum support during the installation and commissioning phases.
- It is a completely open source software. Since it is coded in a common language, it is suitable for modifications later.
- PortalX is licensed under an open source license (MIT) and is completely free. For this, please refer to the 3. LICENSE document in the code.

Installing

It will be installed by following the order described in the install.txt document. When the installation is complete, the installation instructions will be kept in the config.ini file under the config directory under the site address. It will be useful to back up the config.ini file after the installation and as changes are made.

Settings

When an administrator user logs in, the 'Settings' option will appear in the left menu.

- *PortalX Settings*: This is the page where the general settings of the site are made. Here, some fields are expected to be written, and some require uploading files. In some, the options are set and are expected to be selected. In some, one of the two options is selected, which appears on the screen as 'Yes' or 'None'. (in the form of Toogle)

  Site Settings can be changed next time, by users defined as administrators on the site.
  a. Firm: Firm's official title.
  b. Site Description: Displayed description of this site.
  c. Logo: Firm or site logo. If not edit this field, PortalX logo's is displayed. Logo width recommended to 800 pixel about. Height is customizable.
  d. Sidebar background color: The background color of the vertical section on the left side of the page can be set here. If the style is changed with a professional study, the sidebar background should be set here again.
  e. Date display: The appearance of history may vary depending on the country. Standard display date as "d.m.Y", d: day, m:month, Y: long year.
  f. Session Time: This is the time at which the user session will end. Default is 1800 sn. (30 minute) Enter a value in seconds to increase or decrease.
  g. Work in Saturdays, Work in Sundays: It is asked to be used on pages such as meal lists for businesses that work on weekends. The menu for the marked day will be displayed.
  h. DataBase Settings (Mongo): PortalX uses MongoDB database. Database connection needs to be set here. If PortalX and MongoDB are on the same computer, setting is: mongodb://localhost:27017. If it is in a different location, enter the values accordingly. Port

27017 must also be open on the firewall from the web server to the database server. If the database is on a local server, you should not open port 27017 to the outside or set it appropriately for server security.

i. Mongo DB: The definition of the data store(collection) that PortalX uses is shown here. Standard collection is DB01. In different cases, this setting must be changed in the contents of the config.ini file after the installation is completed.

j. Documents: Must be enabled if business-specific documents need to be displayed on PortalX pages.

k. Organization Chart: If a company organizational chart is to be displayed in the page content, it must be clear.

l. Org.Şema Klasörü: The organization chart folder should also be set here. Folder must be in web server, under the portalx folder.
Example: Org_Sema

m. Certificates: If the company's certificates are to be listed, they must be open.

n. Certificate Folder: The certificate files folder should be on the web server, under the portalx folder.

o. Qualification documents: If the company's qualification files list will be used, they must be open.

p. Qualification folder, should be on the web server, under the portalx folder.

q. Forms: If company corporate forms are to be included, they must be open.

r. Forms folder, should be on the web server, under the portalx folder.

s. Menu of the day on the home page: It must be open if you want the menu of that day to be displayed on the home page.

t. Driver Phone number display: If the driver's phone number is required to be displayed in the personnel service list, it must be open.

u. Communication Board: Personel arası iletişimler için kullanılabilecek bir alandır.

v. User can change his/her own information: It is giving people permission to change some of their own information.

w. Name flow: Selection of "Name-Surname" or "Surname-Name" when displaying user names.

x. Length of name in username: Pls.see:Username rules.

y. Length of surname in username: Pls.see:Username rules.

z. Name-surname separator within username: Pls.see:Username rules.

aa. Password Format: This format is used to create passwords. For alfanümerik chars: a or A, for numbers: 9, for special chars ! Must be used. Example: aaaAA99!

bb. Default Password: It is a password that can be used when logging in or resetting a password. It can be changed from the settings at any time.

cc. Closed Personnel/User name prefix: It is a suffix placed in front of the name of the resined user when their account is closed. Example: Disabled_

dd. Closed Personnel/User mail prefix: It is an attachment placed in front of the e-mail account when the account of the resined user is closed.Example: dis_

ee. User Authentication Source: Database or LDAP must be chosen. If LDAP/AD will be used for user login and transactions, LDAP is selected. In both cases, all transactions are recorded in the database.

ff. Domain name: Applies to LDAP selection. It is the domain name registered in LDAP. Example: portalx.com

gg. LDAP(AD) Server, LDAP(AD) Server 2: The LDAP or AD server under this domain name must be specified here. Otherwise, transactions cannot be performed. If there are 2 servers, entering both will shorten the adaptation time.

hh. Base DN: The base DN field defined on the AD server should be entered here. (Must be defined on the LDAP/AD server.) Example: PORTALX

ii. Short name: The short name of the domain must be entered. Example: portalx

jj. Auth user: A user defined on the LDAP/AD server can be assigned as an authority on Portalx. Whether or not this username is defined in Portalx, the user can log in and perform operations as an authorized user.

kk. File Server user folder: It is the root directory for creating the user directory defined in the AD Profile tab. Example: \\fs\yuva\ The user directory is created by adding the username after this directory name. Example: \\fs\yuva\h.kara

ll. User directory drive letter: This is the drive letter that will be assigned to the User Directory for Windows users. Example: Z:

mm. File Server permissions: The user's permissions in the user directory can be selected here. Permissions;

M:Modify with Delete -> Standard permission.
OI:Object Inherit
F:Full access

nn. Groups point (LDAP/AD): Grupların açılacağı OU standart olarak buradan ayarlanabilir. Pls.see: Group Rules.

oo. Groups (LDAP/AD): If you want to make users members of some groups on the AD server, standard groups can be set here. Açılan her kullanıcı bu ayardaki gruplara üye yapılır. Pls.see: Group Rules.

pp. Message to user 1-2: Two message fields to the user or another unit after user registration are given here. After user registration, it is displayed on the screen as text. Can be manipulated with parameters. For parameters Pls.see: LDAP/AD Fields.

- *Users*: This is the page where site and company users are listed. In order for users to be created in the system in accordance with the standards, it will be sufficient to add a user from this page. Support-requiring tasks such as making changes to the user record, changing the unit, changing the password, and opening a locked record will be done from this page.

  Users can be added by clicking the 'Add User' button at the top right of the page. If 'User Source' (usersource) LDAP is selected in the settings, each user added will also be added to the LDAP/AD server.

  If the accounts of the resigned users have been closed, they will not appear in this list, but when the 'Closed Accounts?' option at the top of the list is checked, the names of the resigned users will also appear in the list.

  There is a search box at the top to search the list, all the phrases that appear in the list are included in the search box. In a long list, it is necessary to enter more letters to find the right user.

  The visible length of the list can be changed by selecting the number of lines at the top of the list.

  There are 3 buttons on the list to export or print users to CSV or PDF file types to transfer them to other platforms. According to the search results, the people currently appearing on the list will appear in CSV, PDF or print.
  Note: User can change his/her password from the Profile page.

  Add/Change User: After entering information on the page that opens by clicking the 'Add User' button at the top of the Users page, the user is added by clicking the 'Add User' button. If the user source is set to 'LDAP', the added user will be added to both the database and the LDAP/AD server.

  The fields specified for the user are as follows: (* Mandatory fields for filled.)

  a. * Username,

b. User type; The default value is 'Personnel'.
c. * Name: User's givenname. Second names are entered together.
d. * Surname: User's surname. If desired, maiden name and surname can be entered here together. There is no separate maiden name field.
e. Mail account (by default it is the same as the username, the domain is added by the system.)
f. Registration number: Whatever is desired as a personnel identifier is entered here.
g. Title: Enter user's title. [will also be valid in Exchange mails.]
h. Manager: (The user's manager is added by the system.)
i. * Company [will also be valid in Exchange mails.]
j. * Department [will also be valid in Exchange mails.]
k. Telephone number: (extension number)
l. Telephone number (GSM) is mobile telephone number. [will also be valid in Exchange mails.]
m. Office:
n. Address,
o. District, city, country knowledge,
p. Start Date: It is not the date the personnel record was created, but the actual starting date of the person.
q. Password: A password can be entered manually, a standard password defined in the system can be brought, or if desired, a password can be generated according to the password generation rules defined in the system.
r. Status: Choose open or closed the user.
s. Note: Notes about personel can be kept here.

Usernames must comply with LDAP rules. Please see LDAP Rules section in this document.

If there are any predefined groups, the added user will be added to those groups.

The fields specified in the User Directory (homedir) and User Drive Letter (home_drive) sections are applied to the added user. If the area specified under the User Directory is in the same area as the web server, the system will open this folder if it does not exist. If the User Directory is on a different server and there is a web server on that server, the codes in the \AD\fs folder should be placed on the web server on the file server and run appropriately. The File Server permissions in the settings determine the level of permissions to be applied to the user in the operations to be performed by the web server on the file server.

NOTE: A user's username cannot be changed. If such an operation is desired, the user must be closed and then a new user must be opened. However, in this case, old operations about the user will not be transferred to the new user.

Department Change: The process of changing the location of the user within the company.
The administrator of the user whose location has changed is changed and the groups he/she is a member of are replaced with new unit groups according to the default group expression.

Closing a Resigned User: If the personnel has resigned the company or is not wanted to perform any transactions within PortalX, their account can be closed. Hesabı kapatılan kullanıcının LDAP/AD hesabı kullanıma kapatılır (Disable User).

The system, changes the account knowledges to be closed as specified in the settings;
1. Adds a closing phrase before the display name,
2. Puts the specified suffix in front of the username,
3. The expression specified in the settings is added in front of the mail account,

4. Removed from the predefined groups specified in the settings. If the suffixes are not specified, the process is performed without adding a prefix.

    Example: Resigned users OU: 'Resigned_users',
    Example Resigned user display name: For 'Disabled_' result: Disabled_John Doe
    Example Resigned user mail account: for 'd_' result: d_john.doe@portalx.com

5. Disables account,
6. Moves under the OU specified in the settings.

Unlock: If the user source is LDAP, it will be active.
If the user's LDAP/AD account is locked for some reason, the account can be unlocked using this option with the administrator account. According to the system settings, if the password is entered incorrectly 5 times, the system locks the account and keeps it closed for half an hour. This is a standard prevention in the event of an attack. If the situation is under control, the lock can be opened again.
Note: System administrator will search for the reason of the lockout of the users who are locked out continuously in LDAP/AD server, PortalX does not give knowledge for this reason.

Reset Password: The password of a user who has forgotten their password is renewed here. The password can be entered manually, a standard password can be brought, or a new password can be generated. When the new password is determined, if the user is locked, the lock is also unlocked. This password is temporary and the user will be asked to change their password on the first login. If the user source is LDAP, the password is changed in both LDAP/AD and the database.

Permission: Permission can be defined for the operations that the user can perform in the PortalX system. Permissions as follows;
  a. Enter a news,
  b. Enter an announcement,
  c. Enter an organizational announcement,
  d. Enter en Organization chart,
  e. Adding/Deleting a personnel shuttle,
  f. Adding a meal menu,
  g. Adding/Deleting Quality Documents,
  h. Adding/Deleting official documents,
  i. Admin permission.
Bir kullanıcı bu yetkilerden bir ya da birkaçı için yetkilendirilebilir.

Admin accounts can be set permission to accounts. The LDAP/AD user specified in the Settings section with the local admin account will has full permission.

- Department Operations: Department containing users are listed on this page and it is the page where departments can be added, removed, and modified. Personnel cannot be added to departments on this page.
The system works with a structure of Companys and Departments. For this reason, it is necessary to shape the system design according to this definition. Further gradation is beyond the scope of this system.

- Manager List: This is the page where the department's managers are listed and manager assignments can be made.
The assignment process is to assign a manager to the department using the 'Assign' button. The administrator will be found by searching among registered users. Non-user cannot be assigned.

- Speed Dials: As explained in the phone book section, this is the name given to displaying important numbers from phones that are not connected to a person in the phone book. It can be created regardless of the person.
  The phone number may not be taken from an LDAP/AD user source or a database, but may be from some phones registered in the CUCM or SIP phone book. In this case, keeping records of the same phones on PortalX will also make them visible in the phone book.
  Example: 1111 : Reception.
  It can be entered by pressing the 'Add Phone' button on the Speed Dials page.
  Display colors can be selected in speed dials. After selecting the appropriate colors, save them with the 'Add' button. After making changes, save them with the 'Change' button.

- LDAP Mapping: LDAP/AD mapping can be done at any time during PortalX operation. PortalX saves everything to the database, it does not save to LDAP unless UserSource LDAP is selected. If LDAP is selected as the usersource, it records to both sources, but if a change made in LDAP from outside PortalX is desired to be reflected in PortalX, matching can be done. In the first use, it is possible to transfer the records in LDAP to the database. (LDAP/AD->Database)

Diller

PortalX can be use in different languages. Messages will be shown according to language files in /lang directory. The language of the user's computer firstly shown. If there is no file for this language, English will be displayed.

There is two language in PortalX: English and Turkish.

Distribution of language files in other languages will be done via the PortalX website whenever possible.

If a translation into a new language is desired, the index.php file in the lang directory is run.

Example: On the http://portal.portalx.com/lang/index.php page, you will be asked which language to translate from. Two language messages are displayed side by side, and the ones in red on the right are asked to be translated. At the end of the translation, a language file is created and the pages start to be displayed in this language.

Language selection can be made on the PortalX home page.

PortalX bileşenleri

1. News/Announcements/Organizational Announcements: Everyone can see the news and announcements displayed on the portal home page. New news/announcement entries can be made by administrators or authorized users.

2. Menu of Day: The main page shows the daily meal menu. If desired, can be disabled for display.

If the food menus are entered monthly, the monthly food menu is displayed to the users.

In the food menus, 3 types can be entered for breakfast, 5 types of dishes for lunch and 5 types of dishes for dinner.

Authorized users can make changes to food menus. Authorization can be set for staff for food menus.

Monthly menus are also shown for the past and next 2 months.

3. Organization Chart: Company Organization Charts can be included in the portal content if desired. If you do not want to display the Organization Chart page, it can be turned off from the 'Settings' page.

4. Phone directory: Internal and mobile phones of PortalX users can be entered into the system. The phone book is retrieved from these records.

The manager of the person shown in the directory is also shown, and when the manager name is clicked, the manager's information is also shown in the directory.

Searches in the phone book can be in the form of Personnel or Department. A list of personnel matching the entered search term is brought up.

- If the user source is set to LDAP/AD in the PortalX settings, these phone records are recorded in the telephoneNumber and mobile fields on AD.
- If AD is used as the user source for phones connected to Cisco Call Manager (CUCM) or other SIP trunks, PortalX will reflect the telephoneNumber field in the relevant directories. In this case, the directory on the phone will match the PortalX records.
- Speed Dials are practical and impersonal numbers that appear in the phone book. They are displayed permanently on the phone book page.

5. Personnel Shuttles: A list of company personnel shuttles can be saved in PortalX. Service description, driver name, driver phone number, and route information can be entered.

Passengers can be added or removed from the personnel shuttles by pressing the 'Add Passenger' button.

Authorized users can make changes to shuttles. Authorization can be set for staff for shuttles.

If you do not want the driver's phone to be shown in the list, it can be turned off in the settings.

6. Profile options:
- Profile menü; is where the person's name and small picture (avatar) appear in the upper right corner. When you click on the menu, a menu opens and options are displayed.
- Clicking on the profile option in the Profile menu opens the Profile page. The profile page is the page where the user sees his/her registered information and can change some of his/her information.
- Change Password: Users can change his/her password in Profile page.
- Logout: If the user wants to exit the private mode, he/she presses the Logout option, after confirmation the system returns to normal mode.

LDAP/Active Directory Operations

PortalX can be integrated with LDAP or Active Directory servers.

User authentication and user management can be done via PortalX.

Access to personal sections within the site can be done by authenticating from the business's LDAP/AD server. If LDAP management will not be used, user authentication will be done from the database.

- Once PortalX is installed, it is possible to transfer LDAP/AD users and volumes. Department or user transfer operations can be performed from the LDAP Mapping page. If AD operations are performed outside of PortalX, frequent pairing may be required to avoid problems.

LDAP Rules

LDAP; is abbreviation of Leightweigt Directory Access Protokol. It refers to common user management that can be used for many purposes within a computer system/stack. The most well-known server is Active Directory. In Linux environments, a server called OpenLDAP serves this purpose.
Active Directory is a user management system based on LDAP and developed by Microsoft.
Open LDAP is an open source user management system.

These systems are often used when it is necessary to use the usernames used in accounts within an organization as the only account name for accessing e-mail accounts and other systems and to manage this system centrally.

PortalX web pages have been created as open source for small/medium size companies that have difficulty in LDAP/AD management. This system, which includes both a portal and user management, is distributed free of charge.

LDAP Domain is Organization's domain name. Example: PortalX domain name is portalx.com.

Department/Company creation rules:

A Base DN must be created under the domain (base_dn).

Characters such as spaces, special characters and Turkish characters should not be used in unit names. Spaces, special characters, etc. can be used in definitions. It takes the system identification information and creates a short name for the OU by removing spaces and other prohibited characters. The specified name can be changed during the creation phase.

In the definitions under each parent unit and unit, the OU specified in the "Groups Point (LDAP/AD)" (groups_point) field will be opened and groups will be created under this OU. Example: Custom.

Group Rules:

* All groups must opened under "Groups Point (LDAP/AD)" (groups_point).
* Base groups must opened in "Groups Point" under "Base DN" (base_dn).
Example:
    Domain: portalx.com
    Base DN: PORTALX
    Groups Point: Custom

* Department Groups must opened in "Groups Point" under Department/Company.
Example:
    Domain: portalx.com
    Base DN: PORTALX
    Company: Administrative Affairs (AdministrativeAffairs)
    Department: Security Department (SecurityDep)
    Groups Point: Custom
    Group will be created under portalx.com\PORTALX\AdministrativeAffairs\SecurityDep\Custom.

* As a rule, the groups to be opened under the unit can be determined in advance in the definitions, in which case a parameter can be added to the group name in the form of {department} for both the parent unit and the unit. When creating a group, the system will open groups according to the pre-planned parametric group names.
Example: {department}_Users ->InternalAuditDep_Users.
"Department" will also be valid for Company users, when creating groups. Company groups will be created under the relevant OU (Groups Point) under the Company.

When creating groups under LDAP/AD, characters such as spaces, special characters, and Turkish characters are not used in the group name.

Öntanımlı gruplar tanımlanmamışsa temel DN (Base_dn) altındaki "Grupların yeri" içindeki gruplar kullanılır.
Example: Portalx_Users

An example of a Default Group definition:
Groups: Portalx_Users,{department}_Users

Username Rules:

Username should be as short as possible.

Characters such as spaces, special and Turkish characters cannot be used in the username..

The characters ".", "-" can be used as separators in the username. Spaces and other special characters cannot be used.

Username can be created as first name and last name.

The system will suggest a username according to the length specified for the name and surname. If you change the username, be sure to test its suitability with the "Cont" button.

The lengths for the name and surname can be specified between 0-99. 0: not use, 99: all.
Example: For Hayati Durmaz; Name 1 char, seperator "." and all surname, username: system will suggest as h.durmaz.

The e-mail address will be created in the same way as the username and will be recorded in LDAP records. Opening the mail account on the mail server is a different process; the Portal does not open the mail account.

LDAP/AD Fields:

{displayname} Display Name (Name Surname)

{givenname} Name

{sn} Surname

{mail} Mail Account

{title} Title

{company} Company

{department} Department

{description} Description. This field can be used for a description such as Registration number.

DNS

DNS; is an abbreviation of "Domain Name Service". It is the service where Domain Names and subdomain names are defined and answered when asked.
The image of the DNS server in Windows Server is as follows.
DNS information is important in web server setup. Az follows, we created a "portal" subdomain on the DNS domain so that "portal.portalx.com" can be accessed from the browser. (Picture 1)
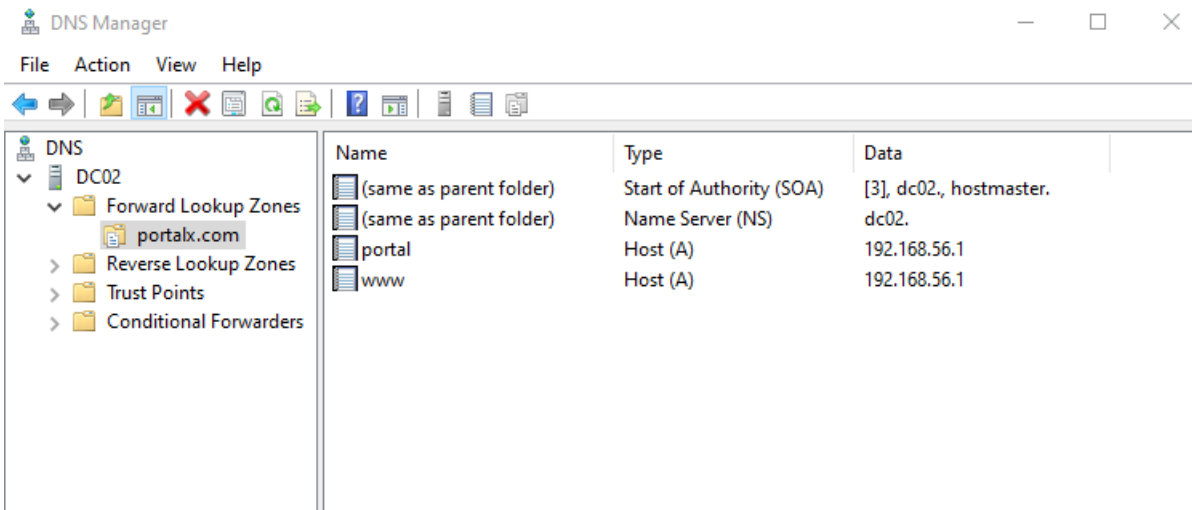
Picture 1: DNS Manager appearance

Active Directory

Below, the internal structure of the Portalx domain in Active Directory is shown as an example. (Picture 2)

Note that two level units have been created under the Base DN, namely Company and Department. PortalX works on two-stage units. If there is more than two levels of unit gradation, a plan should be made in accordance with the two levels.
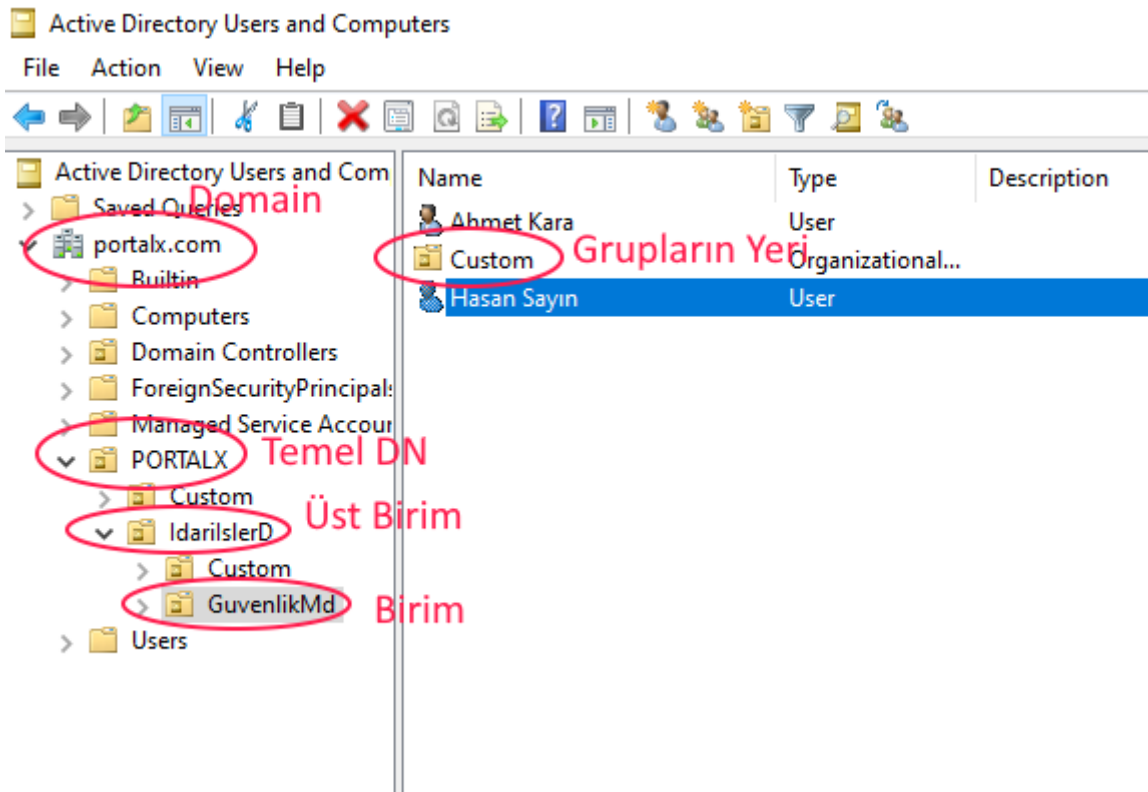
Picture 2: Active Directory Users and Computers appearance