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intranet software

Digger Solutions

Intranet Open Source

Administrator’s Guide

Hello and welcome to your new Intranet!

Welcome to Digger Solutions Intranet Open Source. If you have any questions please review the product documentation, the readme.txt errata file included with the software, and of course the digger solutions website for additional information, product support, and to learn about and purchase Admin and Add-on Paks.

Thank you, I hope you enjoy the fruit of our labors and I hope it makes you and your organization more productive - after all that's what it is all about, isn't it?

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this software consists of voluntary contributions made by many individuals on behalf of digger solutions. for more information about digger solutions, please see http://www.diggersolutions.com.

Installation

Installation is a simple process, just unzip the file that you downloaded into the place where you want the site located. If Intranet Open Source is to be your website in and of itself then unzip it into the root of your website. If it is going to be a subfolder of the site then unzip it there.

The default properties of the site should be sufficient to allow you to view the site immediately – except that you must update the "gsSiteRoot" variable to point to the folder of the root site where Intranet Open Source will exist. This must be done because the variable is used in configuration of the connection string of the included Access database. The default database is an Access database that is included with the distribution, the setup file will point to the location of the database. For security purposes you may want to move the database outside the root of the site and/or setup a DSN to point to the database.

New to Version 2.5.1 is the addition of a global.asa file. More of the site configuration will be moved into the global.asa file in the future to help improve performance, but currently the only configurations in that file are the default permissions applied to newly added employees when using the Employee Admin Pak. By default all permissions are set to nothing – you can adjust them to better suit the needs of your organization. After adding or editing the global.asa file you may need to stop and restart your web services for the changes to take affect.

The default login and password are test/pass. This user has default permissions for everything.

Once you have the software up and running it is advised to update the record of the user "test" with your information, replacing the login and password with items of your own choosing.

You should also update the initial client's data (client id 1) with your company's data. Do not delete the record for client #1, but instead replace the data with your appropriate data.

Clients, Projects, Tasks, and Timecards

Clients are basically the keystone of the entire clients/projects/tasks/timecards system. Projects are assigned to clients. Tasks are assigned to a project or to a client directly (in the case of maintenance, etc, where there is not particular project). I would suggest creating projects for those types of things when possible, it is much easier to track time for a project than for just clients – I have created many reports (the project status report for example) that can really help in project tracking, but won't give you much help if you do not use projects. Tasks are created by those allowed to create tasks (there really is no reason to not allow someone to create tasks unless you really, really don't want them to). Timecards are the final piece to the puzzle and are used to record time against a task, project, or client.

Clients – you can add, edit and archive clients – pretty self-explanatory. Archived clients will now show up in dropdown lists throughout the site, etc. There is also a client contact log to record communications from the client for everyone to see.

Projects – you can add, edit and archive projects. Archived clients will now show up in dropdown lists throughout the site.

Tasks – you can add, edit, and delete tasks. Tasks are not actually deleted my just marked as archived and can be pulled from the archive at any time.

Timecards – you can add, edit, and delete timecards. A large amount of timecards in the system can really slow down reports and other pages that display time calculations. It is recommended that timecards be stored offline when the number begins growing into the 10,000 range. I usually archive anything that is more than 6 months old. Just create a copy of the table and remove everything in it that you don't want to keep online.

Timesheets

Timesheets are used by hourly employees to record their daily time.

PTO

PTO is paid time off. This section is used to request/record time off. When a request is made the requestor's supervisor is notified and approves/disapproves the request. If the request is approved then an entry is made in the calendar, a timecard is created for the PTO, and the requestor is notified that their PTO was approved. If the request is disapproved then the requestor is notified that their PTO request was disapproved.

There is also a preliminary form that a person can use to enter a preliminary request for another person (when a person calls in sick for instance). The person fills out the required info. The requestor (the person the PTO is for) will get an email with a URL asking them to complete the form when possible.

There is a set of several reports for administrative purposes that only authorized employees can view – these are done through the PTO Admin permission.

Reports

There are several basic reports built into Intranet Open Source, but many of them are configurable by choosing the items to filter the search by.

Production Report Grid, basically just a spreadsheet that displays anyone who has a production goal and their contributions so far to that goal and the teams status as well. The production report grid can become rather unwieldy when the number of employees grows or the number of timecards in the system grows to a large number.

The Work Log Internal is a great way to view all the timecards for…, well for about anything you can think of. You can view the timecards for all projects, all clients, all employees, etc (which may take a looooonnnngggg time to display) or you can get specific and just search for all time entered for a specific project by a specific employee for a specified time period. This report also displays some neat summary data that is calculated by the entries in many of the database fields – cost and price especially.

The Work Log For Client is kind of like the Work Log Internal, but it just doesn't give as much detail nor all the cool summary data. It is a great way to determine how much work was done for a client/project over a specific amount of time (think Invoice) and is the only thing we use for billing.

The Project Status report is also a pretty cool tool that allows you to review projects to compare the actual time put into it so far versus what was projected. It gets much more detailed than that, but check it out for yourself.

Recently we added the Project Dashboard – a one-page view of a project. Everything that you could need to know about a project (or links to those things) are all provided on one single page.

PTO reports are discussed in the PTO section.

Calendar

Just a simple calendar. Events can be added to the calendar with the use of the Calendar Admin Pak. If configured to allow it the calendar also displays data about clients, projects, and tasks for the right users. If a task is due that you assigned or was assigned to you and it is not complete yet, it will show up in the calendar.

Discussion Forum

A simple way for teams to record communication about specific topics. One cool feature – when projects are created, a project folder is automatically created in the discussion forum for them.

Employee Directory

The employee directory houses all employee personal/business information.

File Repository

The document repository allows everyone who is a member of this intranet to share documents over the web. The documents are placed into folders according to category or subject and can be searched by contact or file name. Folders can be nested. Eventually we will build in security restriction of folders. Currently when a project is created a project folder is automatically created for that project in the "Projects" folder.

News

A simple news application. New news items can be added with the News Admin Pak. New in version 2.6.0 is the ability to add URL's as news items.

Resources

Basically it is a list of links, either external or internal.

Options

Not currently implemented.

Site Configuration

The site configuration (SiteConfig.asp) file is where you will define what your site does and looks like.

Most of the configuration parameters in the site config file are self explanatory and for most of them the default parameters will work fine. Plus there are plenty of comments included in the file to help set you on your way.

Permissions

The following permissions are set to each user. They can either be manually configured in the tbl_permissions table or can be easily configured with the addition of the Employee Admin Pak.

<u>permAll</u> - if this is set to true the user can do anything and everything, basically making them a "SuperUser".

<u>permAdminAll</u> - if this is set then the user will get a link to the Admin folder and will get links to all admin functionality.

The following admin permissions give the user *links* to the specific admin functionality and links to the admin portion of the site. They do not however limit the ability of a user to perform the admin activities if they have access to the pages (by browsing through the file system to see what is there for example). It is recommended that you apply folder and/or file permissions to the admin folder and supply those usernames/passwords to the people who will need them. It is also recommended that you keep this group small to keep the administrative overhead down.

<u>permAdmin</u> - if this is set it basically displays a link in the menu to the admin portion of the site for that user. If no other admin permissions are set for the user, they will not see any additional links once they get to the admin. Additionally if any admin permissions are set, but this is not, it will be overridden and the link will be displayed anyway.

<u>permAdminCalendar</u> – if this is set the user will be given a link to the calendar admin. The Calendar Admin is part of the Tools Admin Pak.

<u>permAdminDatabaseSetup</u> - gives the user the link to the Database Setup Wizard. The Database Setup Wizard is included with the base distribution.

<u>permAdminEmployees</u> – gives the user the link to the Employee Admin. The Employee Admin is supplied in the Employee Admin Pak.

permAdminEmployeesPerms – gives the user the ability to edit employee permissions.

permAdminFileRepository - gives the user a link to the File Repository Admin. The File Repository Admin is included in the Tools Admin Pak.

permAdminForum – gives the user a link to the Discussion Forum Admin. The Discussion Forum Admin is included in the Tools Admin Pak.

permAdminNews – gives the user a link to the News Admin. The News Admin is included in the Tools Admin Pak.

permAdminSurveys – gives the user a link to the Survey Admin. The Survey Admin is included in the Tools Admin Pak.

permAdminThoughts – gives the user a link to the Thoughts Admin. The Thoughts Admin is included in the base distribution.

The following permissions are user permission and actually to limit the ability of users within the site. In some instances the users may still have links to a specific application, but will not be able to update or delete that item without the proper permissions. For example the user may be able to click on a link that says Edit Timecards, but if they do not have edit timecards permission and it is not their own timecard, they will not be able to edit it. If a permissions record is not created for a user they will still be able to access the site, but will only have the assigned permission to add timecards.

permClientsAdd – gives the user the ability to add clients.

permClientsEdit – gives the user the ability to edit clients. Other users will be able to view the page to view client details but they will not be allowed to update the data.

permClientsDelete – gives the user the ability to delete clients. This is not currently implemented as I feel it is a bad idea to delete client records. They can be made inactive (archived) however and will not be displayed through normal usage of the site.

permProjectsAdd – gives the user the ability to add projects.

permProjectsEdit – gives the user the ability to edit projects. Other users will be able to view the page and the project details, but they will not be allowed to edit the data.

permProjectsDelete – gives the user the ability to delete clients. This is not currently implemented as I feel it is a bad idea to delete project records. They can be made inactive (archived) however and will not be displayed through normal usage of the site.

permTasksAdd – gives the user the ability to add tasks.

permTasksEdit – gives the user the ability to edit **any** task. By default all users can edit tasks that they have entered – actually where they are listed in the "OrderedBy" field.

permTasksDelete – gives the user the ability to delete tasks. Currently the task is not actually deleted, but archived much as projects and clients are.

permTimecardsAdd – gives the user the ability to add timecards. All users should have this ability unless you are providing access for someone to just view the site.

permTimecardsEdit – gives the user the ability to edit **any** timecard. By default all users can edit timecards that they have entered.

permTimecardsDelete – gives the user the ability to delete **any** timecard. By default all users can delete timecards that they have entered. Unlike clients, projects, and tasks when a timecard is deleted it is actually removed from the database. Timecards are the lowest common denominator and no other tables are dependent on timecards.

permTimesheetsEdit – gives the user the ability to edit **any** timesheet. By default all users can edit their own timesheets.

permForumAdd – gives the user the ability to add posts to the Discussion Forum. If a user has the permAdminForum permission, it does **not** automatically apply this permission, too. Though they could add posts as well as edit and delete them in the Discussion Forum Admin. By default any user has permissions to delete any documents that they post.

permRepositoryAdd – gives the user the ability to add documents to the File Repository. If a user as the permAdminRepository permission, it does **not** automatically apply this permission, too. Though they could add documents as well as delete them in the File Repository Admin.

permPTOAdmin – gives the user the ability to view PTO reports and edit PTO records.

Admin Tools Included in Intranet Open Source

Included in Intranet Open Source are administrative tools for the discussion forum, surveys, and the thoughts displayed on the home page. All are very easy to understand and use.

Newly added tools to Intranet Open Source include tools to view and export tables and queries. You can view in a simple table view, you can export to MS Excel or you can export to a comma delimited text file. There are several queries that we felt would be the most popular that are hard-coded in (employees, clients, projects, etc.) – feel free to change those queries to return data in a way that you would like.

With IOS version 2.6.0, we added a GUI administration for the SiteConfig.asp file. This can be found in the Admin section under Site Configuration.

Additional tools and Admin Paks for administering Intranet Open Source can be purchased from the Digger Solutions website (http://www.diggersolutions.com).

Multiple Language Support and International Date Support

Beginning in version 2.2.0 we added Multiple Language Support in the form of a "language" file. The default language file shipped with Intranet Open Source is in English. There are several other language files that have been contributed to the project available for download on the Digger Solutions Free Downloads page.

International Date Support was added in version 2.3.0. This is mostly in the form of changing all dates to the format "DD-MMM-YYYY" before using them in sql queries and by letting the server determine which way it wants to display them. This seems to work 95% of the time, but there are still some instances where European members of the Digger Solutions community have some problems with that. Try changing the date formatting function: MediumDate() located in the file /includes/connection_open.asp. Additional advice is to try different database drivers – the default driver setup in Intranet Open Source is the Jet driver. Using the native Access driver or creating a DSN by using the Access driver seems to understand various date formatting issues better.

Additional Tips and Tricks

The default login and password for the site are test/pass. Permissions are already set for this user to allow them to do anything. Do not delete that user from the database, but instead set them up as yourself, the site administrator. Change the login to your initials and the password to something you prefer.

Do not delete the record for the existing client #1 in the database, instead replace it with your company's data. If you are going to set the option in the configuration page for time charged to the host company (your company) to not be counted as billable, then the host company id must be 1.

Make sure that the access database and the folder the access database reside in give at least the IUSR_Machinename account read, modify, and delete permission (if not giving Everyone those permissions).

If you are having trouble getting Intranet Open Source to work and you are getting a simple "500 Error" page with no additional error messages, make sure that you have "friendly HTTP error messages" unchecked in your browser settings. Also setup IIS to send complete error message, at least while you are debugging.

If you are having trouble with what seems to be a bad database query, you can view the query on the screen by going into the functions RunSQL() and DoSQL() in the /includes/connection_open.asp page and uncommenting the lines that write the sql statement to the page (look for Response.write sql & "
").

SQL Scripts for creating the database in SQL Server 7/2000 can be downloaded from the Digger Solutions free downloads page.

The database schema and additional database information can also be downloaded from the Digger Solutions free downloads page.

If you have any problems or questions about using Intranet Open Source feel free to post them in the Digger Solutions forum. There are many helpful people in the forum, including some of us, and you'll find lots of answers there.

Thanks again for your interest in Digger Solutions Intranet Open Source software.

I imagine that this document will grow in size and information over time. Check the website, http://www.diggersolutions.com for updates. Also, though we all hope there will be none, a bug list will be maintained at the site as well.

Thanks,
Digger Solutions