infoRouter Version 8.0

Administrator's Getting Started Guide

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1) Create and/or Import Users

You may create infoRouter users in two ways:

a) Manually create infoRouter users

b) Use the NT User Import feature to import users from the Active directory

Manually creating users:

Log into infoRouter as SYSADMIN
Navigate to the infoRouter Control Panel
Click on the "Manage Users" link
Click on the "New User" link in the users screen
Enter the user information
Click on the Global User Groups link to add the user to a global user group
Follow the on-screen instructions of the "New User Wizard"

Importing Active Directory (LDAP) Users:

Look into your install directory and setup the infoRouter LDAP Synchronization Manager on a domain controller or a backup domain controller.

Follow the documentation on how to synchronize LDAP users.

Local Library Users:

Local library users are users that are created inside a specific library. Local users remain local to the library and cannot access any resources outside of the library in which they have been created (except for Anonymous Libraries).

For detailed help on "Local Users", refer to the infoRouter online help system.

2) Create Global User Groups

A Global User Group is an object that is used to group global users with similar access and permission levels. It simplifies the administration of library membership and security. A global user group may be assigned library membership. It is a good idea to create global user groups and assign each new infoRouter to a global user group.

Examples of Global User Groups:

Accounting users

Sales users

Project X users

Advantages of Global User Groups:

Assign Global User Groups to libraries as members instead of adding each individual user.

New users who are added to the global user group automatically become members to libraries that the global user group has membership.

New users inherit the security settings of the global user group.

To create a Global User Group, perform the following:

Log into infoRouter as SYSADMIN

Navigate to the infoRouter Control Panel

Click on the Global User Groups link

Click on the New User Group button

Enter a name for the global user group

Select the new global user group by clicking on the row.

Click on the "Add Member" link to assign users to the global user group.

3) Create root-level folders (Libraries)

Root level folders in infoRouter are called Libraries. In order to access a library, an infoRouter user must be a member of the library. Libraries are not visible to non-members. Libraries marked as "Anonymous" will appear to all users even if they are not logged in.

Library Types:

Anonymous Libraries
Anonymous libraries appear to everyone and all folders and documents allow anony-mous read access.

Regular Libraries
Regular Libraries are membership based and access to folders and documents are subject to specific security assigned to library members.

Archive Libraries
Archive libraries contain archived folders and documents

Examples of Libraries:

Accounting
Human Resources
Sales
Marketing
Customer X
Customer Y
Project A
Project B

To create a library, perform the following:

Log into infoRouter as SYSADMIN
Navigate to the infoRouter Control Panel
Click on the Libraries link
Click on the New Library button
Follow the on-screen instructions in the "New Library Wizard"

For detailed information and help on this topic, please navigate to the infoRouter help system.

4) Create Library Members

Now that you have created your libraries, you must assign members. The assigned members will be able to see the library in the root folder tree of infoRouter. Only library members can access the documents and folders of the library. When assigning security to documents and folders, you will only be able to see a list of library members. Refer to section 7 of this document for assigning security to documents and folders.

To add users and global user groups to libraries, perform the following:

Log into infoRouter as SYSADMIN

Navigate to the infoRouter Control Panel

Click on the Libraries link

Select a library by clicking on the library thumbnail

Click on the "Members" button

If you which to add individual users to the library

Click on the "Add Member (User)" button

If you which to add a global user group to the library

Click on the "Add Member (User Group)" button

5) Create Local User Groups

A Local User Group is an object that is used to group users within a library. It simplifies the administration of document and folder security. Local User Groups are local to the library in which they are created. Local User Group members can only be assigned fro within library members.

Examples of Local User Groups:

Clerks

Managers

Power Users

To create a Local User Group, perform the following:

Log into infoRouter as SYSADMIN

Navigate to the infoRouter Control Panel

Click on the Libraries link

Select a library by cicking on the library thumbnail

Click on the Local User Groups link from the menu

Click on the "New User Group" link

Enter a name for the new Local User Group

Click Ok to create the Local User Group

Click on the Local User Group from the list

Click on "Add Member" menu to add members to the local user group

6) Import documents into infoRouter

To import your existing documents into infoRouter, you may use either the built-in Import Tool or the WebDAV tool.

Using the infoRouter Import Tool:

This tool is used to import documents from the server on which infoRouter is installed or valid paths defined in the AccessPaths.xml file.

The AccessPaths.xml file can be found in a sub-folder called "config" under the application directory. By default this file allows access to the "C:\" drive of the server, however, you must edit this file at install to define valid paths where importing is allowed. You may use UNC paths ("//server_name/drive_letter").

To launch the "Import Tool", navigate to any folder in infoRouter and click on the tools menu. Select the "New Import" option.

Using the infoRouter WebDAV Tool:

Using the infoRouter WebDAV tools is easy and flexible.

To upload documents into infoRouter using WebDAV, perform the following:

Go to any server or workstation and launch a browser to access infoRouter.

Navigate to the folder to which you wish to import documents.

Click on the folder name on the right-hand panel to launch infoRouter WebDAV.

A Windows explorer window will launch showing you the contents of the infoRouter libraries and folders.

Simply drag-and-drop files into infoRouter.

For detailed information on WebDAV setup and use, refer to the online help system.

7) Assign security to Folders & Documents

Making Global User Groups or individual infoRouter users members of libraries does not alone give them access. It only means that they are members of the library and they can be given specific permissions. Until individual users or global user groups are assigned specific security permissions, they will not be able to access the library, its sub-folders and documents.

Choosing the right security model for your organization is important, so come up with a plan that will suit your needs in the long run.

Setting security at the folder and document level:

A common strategy is to give all library members "List" right at the root folder level and to give individuals or local group members specific rights at the sub-folder and document level.

To do this, perform the following:

> Click on the library folder on the folder tree
>
> Click on the Tools Menu
>
> Choose "Folder Properties"
>
> Click on the "Security" link in the folder properties window.
>
> Select the "Library Members" user group (built-in group) and choose "List" in the drop down box, click on the "Add" button.

This will allow all library members to be able to list the folder contents of the library. Now, go to each individual folder and assign folder specific permissions to individual users or groups.

For sub-folder and document level security, you may wish to use security inheritance or individual folder and document security.

For more on this topic, please refer to the online help system.

8) Create Portals

At install, infoRouter comes with a default portal, which is used mainly as a welcome screen. You may change this portal to reflect your logo, specific messages etc. When users navigate to infoRouter, they are greeted with this default portal. You may create as many portals as you wish.

Employee Portals:
You may wish to create multiple portals for different groups of employees. Each portal you setup may provide useful information and links to commonly used forms, templates, Human Resources related forms and documents, Corporate Brochures and Documents etc.

Partner Portals:
You may create Partner Portals to communicate with vendors and other business partners.

Project Portals:
You may create Project Portals to collaborate with project members. Use static and dynamic gadgets to automatically display project related information on these portals.

Customer Portals:
You may create Customer Portals to communicate with customers.
Customized portals for each one of your customers may be a very good idea. You can include their logos and provide customer specific information on each portal. Use gadgets to display contents of infoRouter folders. This way, your customers can quickly access information they need without having to learn the advanced functions and features of infoRouter.

To create portals, perform the following:

> Log into infoRouter as SYSADMIN
>
> Navigate to the infoRouter Control Panel
>
> Click on the Portals link
>
> Click on the "New Portal" button
>
> Leave the "Model Portal" blank if you would like to start creating a portal from scratch otherwise, select an existing portal (default) and specify a name for the new portal.
>
> The new portal will be created.
>
> *For more information on how to edit/customize portals, please refer to the online help system*

9) Categories

Create categories to simplify the task of searching for documents.

Categories are pre-defined search queries that return a dynamic result set. All users have to do is click on a specific category to display search results.

To create categories, perform the following:

Navigate to the Categories Tab

Click on the "Add New Category" link.

Note: *This links only appears to the SYSADMIN and Category Administrators*

Enter specific search criteria in the search screen

Enter a Category Name

Enter a Category Description

Click on the "Save" button to save the category

The new category will now appear in the "Categories" window.

Notice that when you click on the category, the search will immediately fire and display results.

Advantages of creating categories:

Pre-defined search criteria makes searching for and finding documents easy

Categories are dynamic. When documents matching the specified search are added, they automatically appear under the search results.

Simple screens can be generated for users with little experience.

Complex search criteria can be defined shielding the user from having to specify complex queries over and over again

10) Saved searches

Create saved search screens to simplify the task of searching for documents.

Saved searches are partially pre-defined and structured search query screens that allow users to generate search queries quickly.
Unlike categories, saved search screens are invoked from the "Advanced Search" screens and users are prompted for specific information.

To create Saved Search screens, perform the following:

Navigate to the "Search" screen by clicking on the search tab

Select "New Search Page" from the search pages drop down prompt

Note: *This links only appears to the SYSADMIN and Category Administrators*

Enter specific search criteria in the search screen

Enter a "Search Page Name"

Enter a "Description" for the search page

Select the prompts you wish to make visible in the new search screen

Click on the "Save" button to save the search screen.

The new Saved Search Screen will appear in the search pages drop down

Notice that when users select the search screen, they will be presented with a custom search screen.

Advantages of creating saved search screens:

Pre-defined search screens make searching for specific types of document easy.

Unnecessary search prompts are eliminated from view making the search process for specific document types easy.

Different groups of users can use custom search screens that are specific to them.

11) Custom properties

infoRouter Custom Property Sets are a very powerful mechanism that allow users to create custom properties for documents, folders and users.

Custom properties can be used to search for documents, folders and users. You should plan for and create custom properties that fit the needs of your organization.

Examples:

A custom property can be created to categorize documents based on the customer for whom documents may have been created. This custom property may include fields such as:

> Customer Number
>
> Customer Name
>
> Project

For evey document you create that is related to a customer, you can now apply and search for these documents by specifying a customer number (even though the document may not include customer number information)

A custom property can be created for images. This custom property may include fields such as:

> Image Type
> JPEG, BMP, GIF, EPS
>
> Image Size
> 10X10, 16X16, 32X32, 800X600
>
> Resolution
> 72dpi, 300dpi, 2400dpi

For every image document, you may assign from the possible values. Using this custom property, you can search for images in infoRouter matching the criteria. You may even assign text values to images that might explain what the image is about. This type of search is not possible without a robust mechanism offered by infoRouter custom properties.

Note: You may include custom properties into Categories and Saved Search screens.

12) Form templates

Form templates are yet another powerful mechanism that allow users to create documents by filling out simple forms. The forms can be designed using standard HTML editing tools.

The advantage of using form templates to create documents:

Enforce corporate standards for formatting (Fonts, Font Sizing, document length etc)

Inclusion of disclaimers and standard text in documents

Searchable text generation

Rendering options to display text in multiple formats

Form fields can be tied to custom properties

Form data is stored in XML format making it editable.

Documents created using form templates is stored in HTML format.

We recommend strongly that you plan for and create a library of form templates to improve the process of creating documents.

How to create form templates:

Simply design your form template using your favorite HTML editing tool

Upload your form template into the "Form Templates" library. The new form template will appear in a list of available form templates when users choose to create a document using a form template.
Please note that by default, the "Form Templates" library is Anonymous.

If you wish to create form templates specific to libraries, create a folder in a library but the folder must be named "[Form Templates]".

Library specific templates will appear in the list of available form templates when a user chooses to create a document using form templates if the user has access to the library.

For more information, please refer to the Form Template Administrator's Guide