introupe

Version 2.3

Best Practice Guide

22 July 2009

Best Practice Guide

Introduction

This document is designed to give you an indication of how best to setup the system for primary schools, secondary schools, and small businesses.

This document will cover:
- Installing the base system
- Configuring the base system
- Installing the modules
- Configuring the modules
- Configuring Booking module
- Configuring Messages module
- Configuring IT HelpDesk module
- Configuring Inventory module
- Configuring Premises HelpDesk module

1. Installing the base system

Whilst progressing through this section please follow the installation guide found on the CD.

Before installing the base system it is highly advisable to not have the following software installed on the destination server/workstation:
- IIS (Internet Information Services)
- PHP
- Apache
- PostgreSQL

When executing the installation please ensure the current user has administration rights to the operating system as various actions will be performed during the installation.

Progress the installation to the product key page accepting the EULA on the way.

Now enter the company name that you used when registering for product keys. This should be stated when you receive your product keys. **If the entered company name does not match then the product keys will NOT be invalid**. Now enter the product key for the base system. If the product key is invalid then a message will be displayed accordingly and you must enter a valid one. If the company name is correct but you still receive the error message then the expiration date may have past.

On the options dialog it is advisable to install all options.
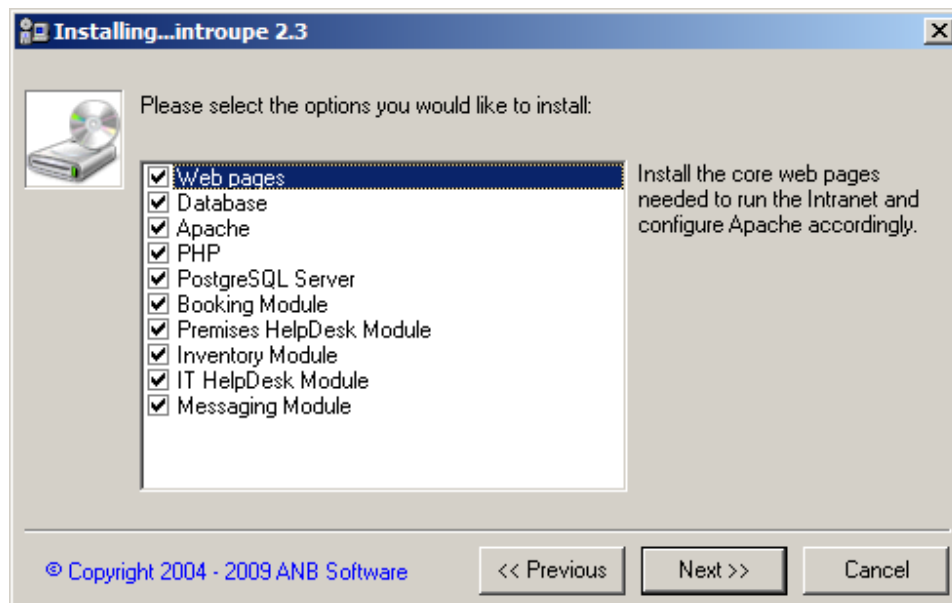
On the destination page it is advisable to simply accept the default location. However, this can be changed if desired.
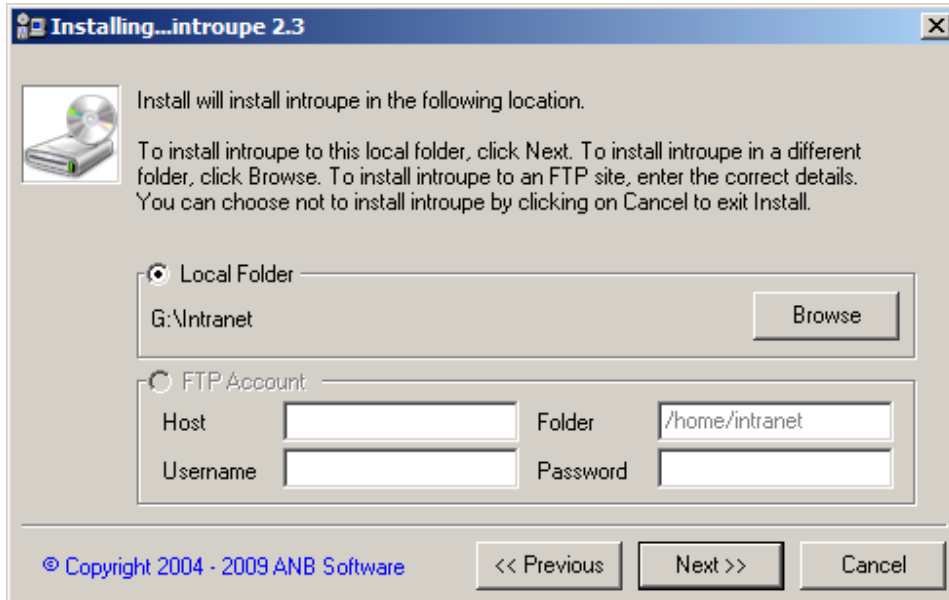
On the PHP destination page it is advisable tosimply accept the default location when installing it. If you have chosen not to install PHP then you need to specify the location of the pre-installed version.
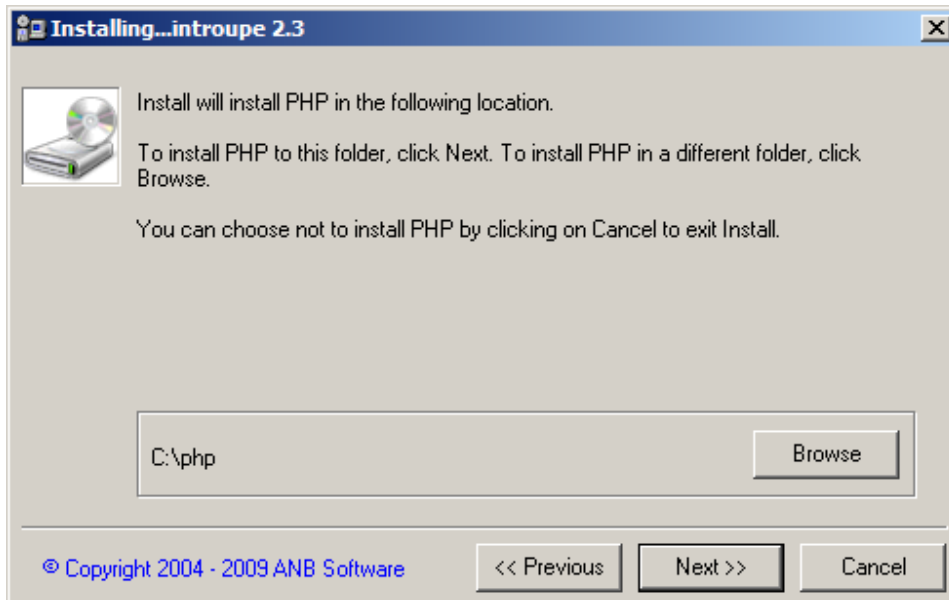

During the Apache installation you maybe requested by Windows to unblock the server from listening for connections. Should this appear please select 'Unblock'. Otherwise users on other computers will not be able to connect.

During the PostgreSQL installation a local user will be created named "postgre". This is used as the user credentials for the database server service. The password for this account is "anything". If you have password complexity rules enabled then you will need to edit the SETUPA.BAT file in the installation to have a more complex password (see the online knowledge base for how to do this).

You will also be requested to enter the password for the "root" user. This will be used to connect to the database from introupe.

Once all installed components have been successfully installed, Apache will be restarted to take account of the new websites added.
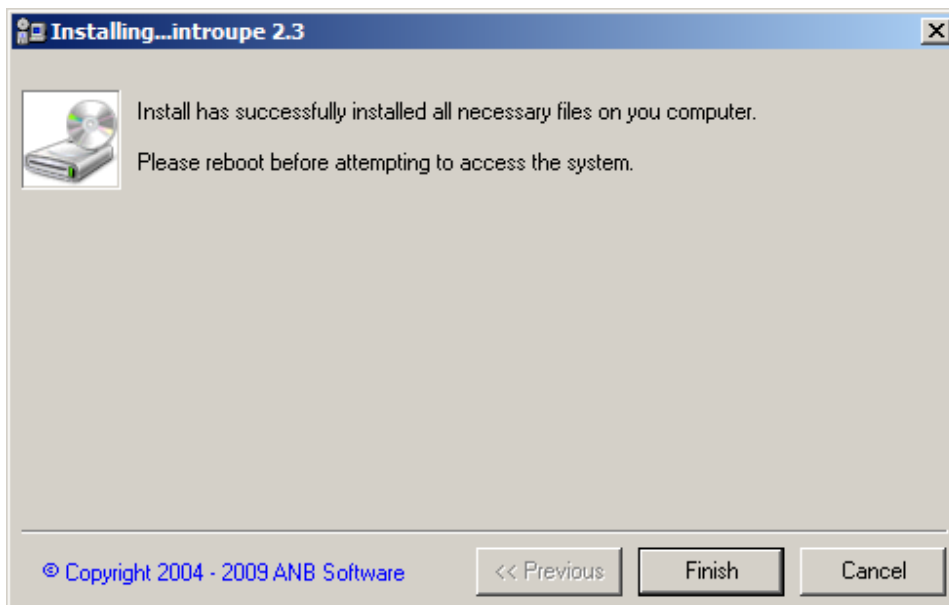
You will now need to restart for some changes to take effect.

After restarting go to http://intranet.localhost on the installed server using your web browser.

2. Configuring the base system

Login to the system using the default administration account 'admin' and password 'password'.

Change 'admin' password
The very first task to do is to change the password of the 'admin' account. Click 'My Details' and change your password.

Basic Setup
Select 'Manage Site' ➔ 'Site Config'.

Set the 'ADMIN_EMAIL' property to the email address of the administrator. Note: this is NOT the email of the 'admin' account.

Set the default expiry date of all CMS articles using the 'CMS_ARTICLE_EXPIRY' property. By default this is set to 365 days.

If you prefer to have unencrypted passwords then change the property of 'ENCRYPT_PASS' to 'No'.

Set the 'INSTALL_URL' property to the URL of where the server is accessible from, i.e. http://intranet.myserver.com. DO NOT include a trailing backslash.

Set the 'SITE_NAME' property to whatever you would like users to see on the site. For example, this could the name of your organisation.

Once these properties have been set click 'Submit Changes' and the changes will be saved. The effects will be instantaneous.

Groups
The next task to do is create all the required groups. It would be quicker to use the User Manager to achieve these tasks, but can be achieved using the online facility.

The following groups are an indication as to which groups should be created for primary and secondary schools:
- Head Teacher
- Senior Management Team (SMT)
- Senior Leadership Team (SLT)
- Head of Year (HOY)
- Head of Department (HOD)
- Premises Team (Caretakers)
- Technical Support
- Office
- Teachers
- Teaching Assistants

- Librarian
- Finance
- *Each subject / department as a separate group, i.e. English, Science,etc.*

The following groups are an indication as to which groups should be created for businesses:
- Managing Director
- Director
- Senior Management Team (SMT)
- Head of Department (HOD)
- Manager
- Premises Team (Caretakers)
- Technical Support
- Office
- Finance
- *Each department as a separate group*

Module Setup
Select 'Module Setup'.

Here you will be presented with all the modules currently installed in the system. The list will display the version, date, status, and expiration date of each module.

By default all users have access to all areas (except 'Manage Site'), and all users are effective administrators in each module. Therefore, you need to apply permissions/restriction as to who can access what and who can manage what. To do this, select each module in turn and set the following options:

Active:
Enabling this option will allow users to access the module. Disabling this not allow users to access the module.

View:
Checking this will show a link to the module on the navigation bar. Unchecking this will remove the link to the module from the navigation bar.

Inmenu:
NOT USED. Ignore.

Login:
Checking this will ensure users have to be logged in to access this module. If not checked anyone can access the module whether logged in or not. Also, any permissions set will be ignored.

Permissions – Read Access:
Select the groups who will have read access to this module. Specifying no groups will result in everyone having read-only access to the module.

Permissions – Write Access:
Select the groups who will have write access to this module. Specifying no groups will result in everyone having write access to the module.

Click 'Update' when complete.

The following table describes the advised options for all organisations:

Module	Active	View	Login	Read Access	Write Access
News	Yes	Yes	No	N/A	N/A
Quick Links	Yes	No	No	N/A	N/A
Articles	Yes	No	No	N/A	N/A
My Details	Yes	No	Yes	N/A	N/A
Messages	Yes	No	Yes	Staff	N/A
IT HelpDesk	Yes	Yes	Yes	Staff	Technical Support
Premises HelpDesk	Yes	Yes	Yes	Staff	Premises Team
Booking	Yes	Yes	Yes	Staff	Technical Support
Inventory	Yes	No	Yes	Technical Support	N/A

3. Installing the modules

Whilst progressing through this section please follow the module installation guide found on the CD.

Simply progress and complete the module installer accepting the EULA, entering the valid product key, specifying the location of the Intranet (i.e. C:\Intranet), and specifying the database. Presuming the module installer is being executed on the server where the system resides the database settings should be:

Host: localhost
Username: root
Password: *<the password set during main install>*

After installation is complete the module is ready to use

4. Configuring the modules

Login to the system as an administrator and click 'Manage Site' ➔ 'Module Setup'. Click on the installed module from the list. Then specify what options should be used for this particular module (use the table from section 2).

5. Configuring Booking module

Firstly use the Inventory module to create the locations and any bookable assets.

Select the 'Admin' link under 'Administration' (when in the Booking module).

Configuration

Enter the start date and end date. For schools this would generally be the school year (for example 01/09/08 – 25/07/09). For businesses this can be set to anything as long as the start date is before the date you would like bookings to start.

Enter the start time and end time for the "full day". When the bookings are viewed in 'Full Day' view the times will be shown from start time to end time.

For primary schools this will most likely be the start and end of the school day.

For secondary schools who have activities outside of the school day this will most likely be 8am to 9pm. For businesses this will most likely be the working hours, i.e. 9am to 6pm.

Enter the calendar interval for the "full day". When the bookings are viewed in 'Full Day' view this is the time between the times shown. For example, if the interval is set to 60 mins and the start time is 9am, the times/blocks will be shown as 9am-10am, 10am-11am, etc. Depending on the length of your working day will depend what value to choose. A standard value would be 60 mins.

The last three options specify what information is displayed on each booking. For primary and secondary schools you will just need 'User' shown. For businesses you may also want the 'Title' and/or 'Description' so you know what the room is booked for.

Advance Booking Limit

For primary and secondary schools you will most likely require teachers to only be permitted to book rooms by short notice. Therefore, 14 days should be acceptable. Certain other members of staff, i.e. office or premises, may need greater advance notice to be able to book rooms for external use, for example. Therefore, these groups can be added with a greater limit or unlimited.
NOTE: If a user is a member of two of these groups then the highest limit takes priority.

Manage Locations

Simply select all the locations you would like to make available for booking. These locations are from the Inventory module.

Manage Sets

Firstly you must create at least one 'set'. For primary and secondary schools this will most likely be:
- Classrooms
- IT Rooms
- Halls
- Meeting Rooms

For businesses this will most likely be:
- Meeting Rooms

Then you need to put the actual rooms in a 'set'. To do this select the room from the drop down list next 'Move' and select the desired 'set', and click 'Move'. This room will now be accessible in this 'set'.

The 'sets' are show in the left menu, at the top.

An additional option is to allow assets to be booked. Select 'Include Assets' and click 'Save' if you have any assets available for booking, i.e. digital camera. Selecting this option will show another 'set' called 'Assets'.

Manage Assets

Simply select all the assets you would like to make available for booking.

These assets are from the Inventory module.

6. Configuring Messages module

There is nothing to configure for the Messages module.

7. Configuring IT HelpDesk module

There is currently only one option to set for the IT HelpDesk module, and that is whether to send emails or not when a new ticket is entered or a followup is added. This option is set in the 'Site Config' with the HELPDESK_SENDEMAIL property. If this option is on (set to yes) then by default the system will attempt to connect to an SMTP server on the local server. If you have an SMTP server on a different server then you will need to change the SMTP server settings in PHP.INI. To do this, open C:\PHP\PHP.INI and look for "[mail function]" section. You will need to set the SMTP value to your SMTP server IP address, as well as the port number and an email address. The email address is what is displayed when the recipients receive the email (i.e. who it came from). Once you have save these changes you will need to either restart the server or restart the Apache service.

System Status

In primary and secondary schools these services may include:
- SIMS / MIS

- Internet
- Email
- Staff Homespace
- Student Homespace
- VLE

For businesses this may include:
- Internet
- Email
- Document Server
- Application Server

8. Configuring Inventory module

The following asset types would most likely be required in all organisations.

Therefore, using 'Peripheral Setup' ('Peripherals' under 'Setup' heading) enter the following asset types:
- Monitor
- Scanner
- Speakers
- Print Server
- Switch
- KVM
- Digital Camera
- Video Camera

Before adding any assets to the inventory it is advisable to create the values for various options, i.e. computer types, operating systems, etc. To do this, go to 'Dropdown Menus' under 'Setup'. Now select the types individually and add the types, i.e. 'Windows Vista' to 'Operating Systems'.

9. Configuring Premises HelpDesk module

Select the 'Manage' link when in the Premises HelpDesk module.

Manage
The following settings should be sufficient:

Setting	Schools	Businesses
Use subject field….	No	Yes
Use priority field	Yes	Yes
Use common problems	Yes	No
Upload images	Yes	No
Allow 'admins' to upload…	Yes	No
Allow 'originator' to upload…	Yes	No
Email new tickets…	Yes	Yes

Common Problems

The common problems will vary from organisation to organisation. The most common problems for a school will be:

- Broken window
- Broken door
- Broken door handle
- Light out
- Chair broken
- Table broken

It is unlikely that a company will have common problems but if there are then they can be entered here.