

QuickStart Guide:

Introducing the New User Interface!

Welcome to the new user interface for your intranet. We've added new customization features and color schemes, improved navigation, and more. It's all designed to make your intranet work the way you do.

This guide will explain all of the changes and help you to take advantage of each of the exciting, new features.

THE NEW UI – with more ways to customize your intranet

- Customize your navigation with the “Menu”
- Collapse the “Menu” and homepage windows to get more onscreen work space
- Add an unlimited number of “Quick Links” as tabs across the top of your intranet
- Match your corporate colors with one of our new color schemes
- Customize “Shortcuts” for quick navigation
- Add custom links to the new “My Favorites” application

Site Administrators: Be sure to review “[Feature Notes](#)” located at the end of this document for key information regarding the new UI.

With the new customization options, your intranet is more flexible than ever.

- **Full Menu Control** – add, remove, reorder, and organize your Menu items to fit your group’s needs
- **Unlimited “Quick Links”** – add as many Quick Link tabs to the top of your intranet site as you need
- **Custom Shortcuts** – add custom shortcuts to link you to anywhere within or outside of your intranet
- **Color Scheme Choices** – choose from a long list of new color schemes to customize your intranet

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New Features

New Site Layout

The new user interface includes many features that make your intranet more flexible and customizable than before.

We've added a **Command Bar** at the top of every application page so that your controls are now all in one easy-to-find place. We've also made the home page windows and the **Menu** collapsible, giving you more onscreen workspace.

The screenshot displays the Stevens & Co. intranet home page. At the top, a navigation bar includes links for Home, Conferencing, Intranet Advisor, Web Folders, and My Favorites. A search bar with 'Google' is on the right. Below this is a 'Command Bar' with buttons for Customize, Personalize, Send Email, Save Link, and Window. The main content area is divided into several sections: Announcements, Calendar, Tasks, and What's New. A left-hand menu is visible, listing various application categories like Home, Pat, Shortcuts, Tools, Administration, Calendar, Help, Contacts, Databases, Discussions, Documents, Expense Reports, Members, Polls, and Tasks. Callouts point to specific features: 'New Quick Links' points to the left menu; 'Welcome, "Home" and Logout' points to the top navigation bar; 'New Command Bar' points to the bar with Customize, Personalize, Send Email, Save Link, and Window buttons; 'Collapsible Home Page Windows' points to the window control icons on the right side of the content panels; 'Collapsible Menu' points to the left-hand menu; and 'Clickable Application Names' points to the calendar entries.

Stevens & Co.
Christine Bataille (Home | Logout)

Search: Google Go

Home | Conferencing | Intranet Advisor | Web Folders | My Favorites

Wednesday, July 27, 2005

Customize Personalize Send Email Save Link Window

Home Pat Shortcuts Tools Administration Calendar Help Contacts Databases Discussions Documents Expense Reports Members Polls Tasks

Announcements

Company Outing July 29th! (Posted on Jul 22 by Christine Bataille)

Calendar

Today July 27

10:00 AM Project Team Meeting

2:00 PM Marketing Department Meeting

Thursday July 28

9:00 AM Client Status Update

3:00 PM Weekly PR call

Friday July 29

10:00 AM Marketing Department Meeting

Monday August 1

11:00 AM Review of Campaign Results

Tuesday August 2

12:00 PM Management Staff Meeting

Today View This Week View This Month

Quick Start

Tasks

Task Due Date

Call Gail at Constant Contact Jul 27

Send proposal to Melonie Jul 30

Delete Mark Complete

What's New?

Members

Tinka Hooper joined on Jul 25

Jeff Cody joined on Jul 25

Documents

Staff Meeting Minutes (Created on Jul 22 by Christine Bataille)

Customer Communications (Created on Jul 22 by Christine Bataille)

Product Features (Created on Jul 22 by Christine Bataille)

Marketing Plan (Created on Jul 22 by Christine Bataille)

Pricing Matrix (Edited on Jul 22 by Christine Bataille)

QuickStart Guide (Created on Jul 22 by Christine Bataille)

Welcome, "Home" and Logout

New Quick Links

New Command Bar

Collapsible Home Page Windows

Collapsible Menu

Clickable Application Names

New Features

Command Bar

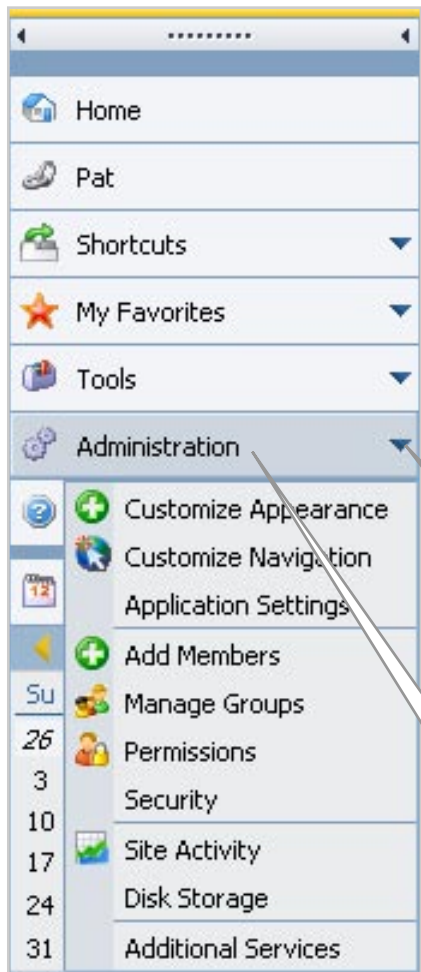
The Command Bar contains many common commands used throughout your intranet and is found on every page, allowing you to manage your information from one easy-to-find place. The Command Bar is dynamic, so the buttons will change as you navigate your intranet.



Use the buttons on the Command Bar for a number of functions, such as adding a new record to a database or printing a Calendar view. There's even a helpful link to the new Help System to quickly answer your questions.

One click to the New Help System

Action Menus



Action Menus are now available for each of the applications. Each item now has a little drop-down arrow on the right. Click this arrow and you open the Action Menu for that application. Each Action Menu contains a “shortcut” to a particular page in an application.

For example, to change the color of your intranet, you can use the action menu to go directly to “Customize Appearance” where you can choose one of the classy new color schemes. It's quicker and easier, saving you time.

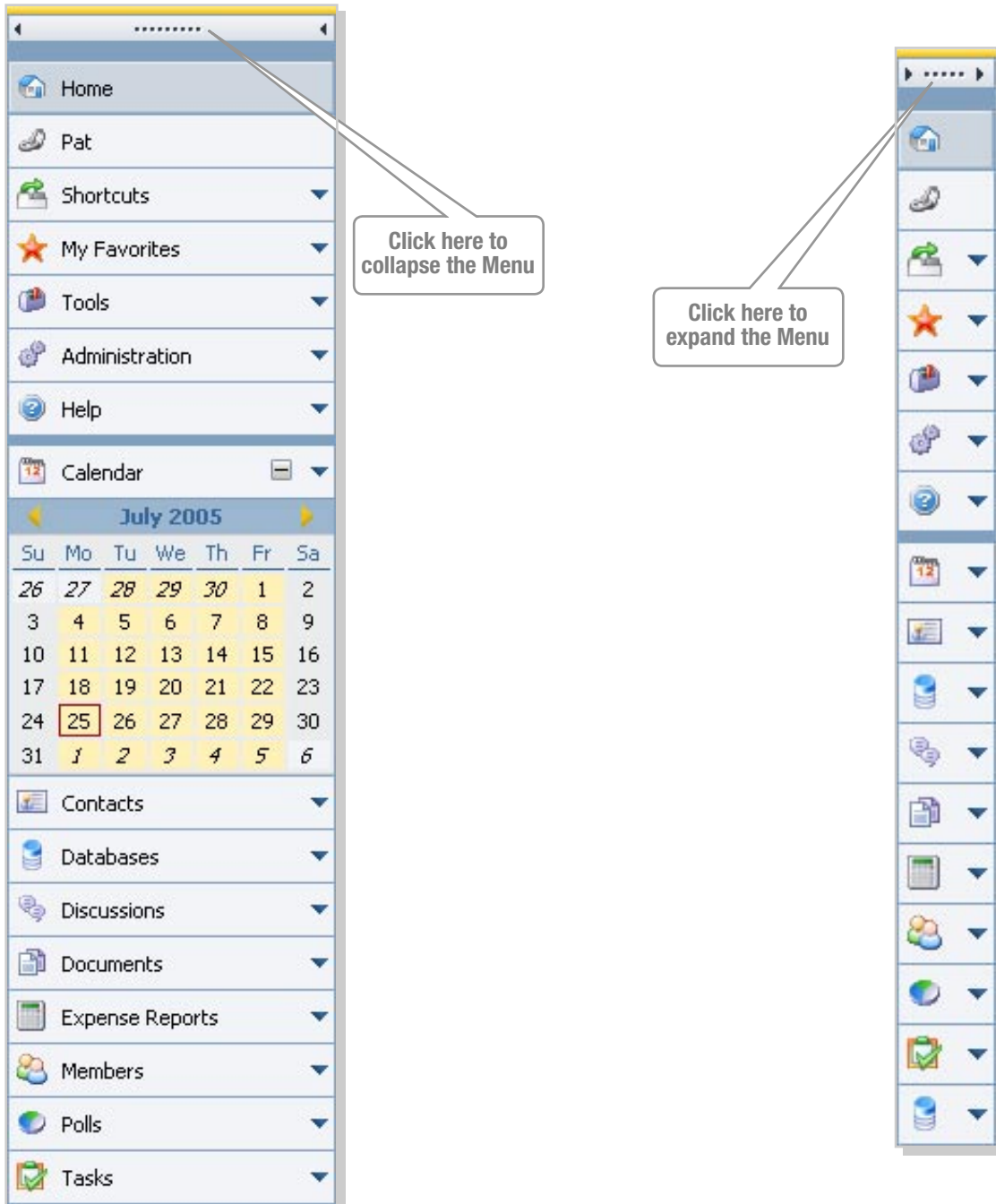
Click the arrow to open the Action Menu

Click here to go directly to the Site Administration page

New Features

Collapsible Menu

The entire Menu is now collapsible to help you make better use of your screen real estate. Simply collapse the Menu when you need more workspace, and expand it when you want to see the full Menu again.



New Features

My Favorites

Now both Admins and Members can bookmark their favorite websites quickly and easily. Since this is a personal feature, each user will only see his/her Favorites.



Icon Library



Customize your links listed in “My Favorites” by choosing from our new icon library.

You can add and change icons for any link you’ve added to your favorites.

Quick Links

Now you can add an unlimited number of “Quick Links” to the top of your intranet. You can create custom URLs, and even move Menu items to Quick Links and vice versa. There is no limit on the number of Quick Links you can add. Once the visible space is filled, navigation arrows will appear on the left and right to allow you to scroll through the list and easily find what you need.



New Features

Create a New Quick Link

To add a custom URL to Quick Links, simply select **Administration > Customize Navigation** from the Menu and the Customize Navigation screen appears. Click the “New” button on the Command Bar and you will be taken to the New Link page:

New Link (Quick Links) * required

Link Name: *

URL: *

Icon:

MORE OPTIONS

Location:

Open:

- in the intranet frame (*show menu*)
- in the intranet frame (*don't show menu*)
- in a new window

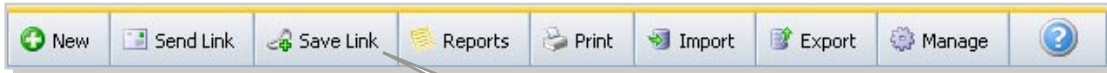
If your site is using SSL, we recommend you open all non-secure links in a new window to avoid security warnings.

- After entering the link name and URL and picking an icon, choose how you want your link to open:
 - Opening in the intranet frame and replacing the main content portion of your screen.
 - Opening in the intranet frame and hiding the Menu portion of your screen.
 - Opening in a new browser window entirely and leaving the current intranet application window untouched.
- Click **Save**.
- Move the link to its desired position in the navigation structure by selecting it first and then using the green navigation arrows to position it (See the Customizing the Menu & Quick Links section for more details).
- Once the link is placed, click **Save**. To make changes on other Links tabs without losing these changes, click **Apply**.

New Features

Save Link

To quickly turn any page in your intranet into a link, click the new “Save Link” button on the Command Bar. This automatically captures the URL of any page in the intranet and turns it into a custom link for your Shortcuts, Favorites, Menu, Quick Links, or homepage Links.



Capture the page URL and create a custom link.

New & Improved “What’s New”

You now have the option to set how long a new item will be considered “new” and whether it appears in the “What’s New” section of the homepage.

To configure the number of days and items displayed:

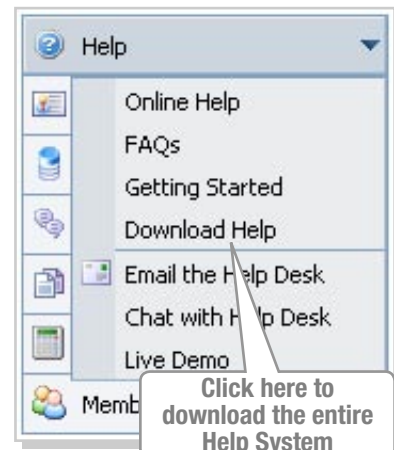
	Items are new for:	Show in What's New:	Show up to:
Announcements	7 days		Show all
Calendar			7 days of events
Databases	7 days	<input checked="" type="checkbox"/>	Show all
Discussions	3 days	<input checked="" type="checkbox"/>	8 items
Documents	7 days	<input checked="" type="checkbox"/>	8 items
Members	7 days	<input checked="" type="checkbox"/>	8 items
Tasks	7 days		8 items

- Select **Administration > Customize Appearance** from the Menu.
- In the **Application Settings** section, select the number of days and items for each application.
- If you would like the application to appear in the “What’s New” section of the Home Page, mark the checkbox.

New Help Menu

It's now really easy get help at any time, and it's all available right from the Menu.

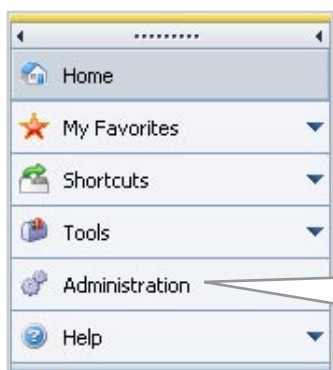
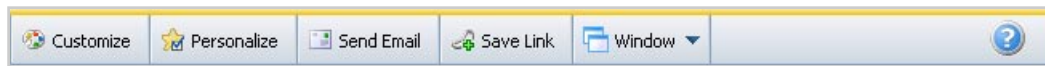
Just click on “Help” or click the drop down arrow to see the Action Menu. You can even download a .pdf file of the entire Help System as an excellent reference guide.



New Customization Options

Customizing Your Intranet

You can customize your intranet by adding a homepage message and image (such as your company logo), change the color scheme, change the homepage layout, etc. Simply click on the **Administration** Action Menu and choose **Customize Appearance**, or click the “Customize” button in the **Command Bar** at the top of the Homepage.

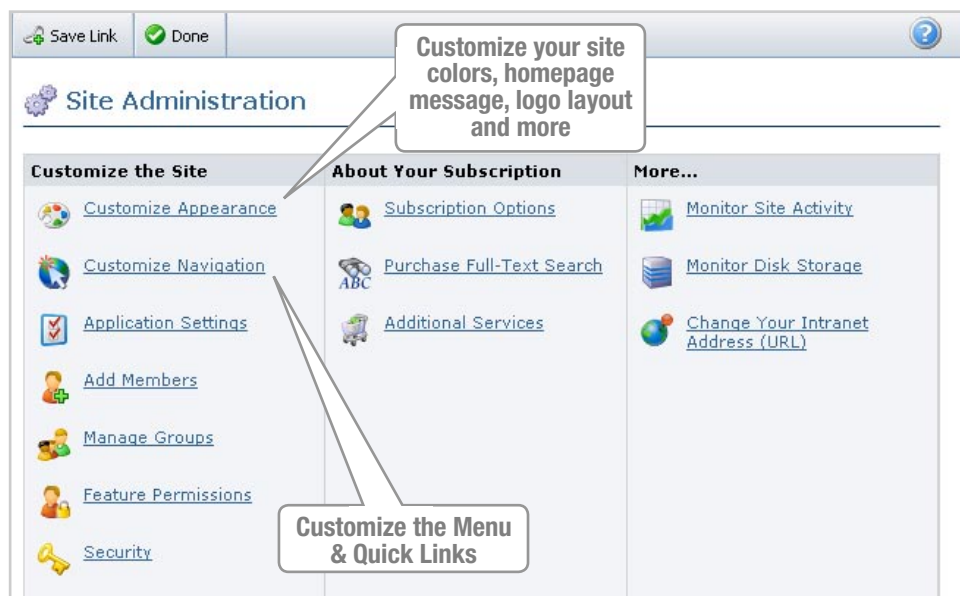


If you click directly on **Administration**, you will be taken to the new Site Administration page. This page contains links to all of the areas an Administrator needs to access to manage the intranet site.

Click here to go directly to the Site Administration page

New Site Administration Page

Using the Site Administration page, you can customize the look and feel of your intranet quickly and easily. You will also find all of the options that were part of the “Manage Site” section of the previous UI.

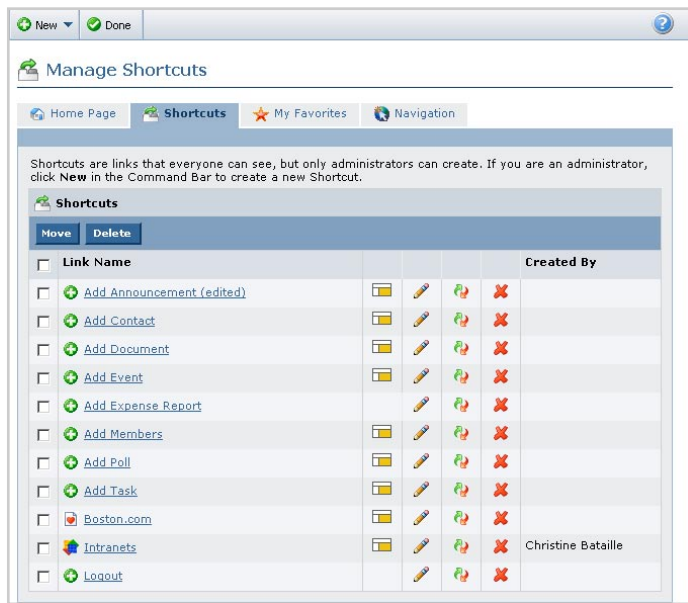


New Customization Options

Managing “Links” & Customizing Navigation

There are many places within your intranet where you can set up links to an application page or an external place on the web.

To make all of these “links” easier to manage, we’ve combined them into one convenient location in your intranet. Simply choose the tab for the appropriate section that indicates where the link is located to display your list of links.



There are four types of links that can be added and managed through this new, tabbed page:

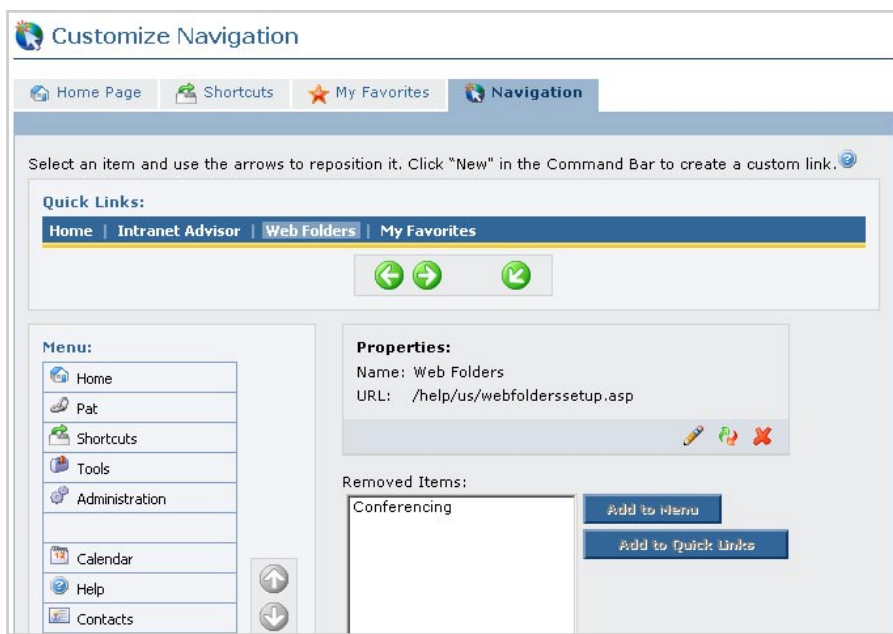
- **Tab 1: Home Page**
This tab displays all of the links that reside in the Links window of your home page and is divided into two sections: My Links (personal) and Public Links.
- **Tab 2: Shortcuts**
Links can be added to **Shortcuts** by an Administrator, and will display in the Menu under the Shortcuts button when the Action Menu arrow is clicked. Members can view the shortcuts an administrator adds in a read-only list under the Shortcuts tab.
- **Tab 3: My Favorites**
Custom, personal links added to My Favorites will display under the My Favorites button in the Menu when the Action Menu arrow is clicked. These links are only visible to the individual user, not the group.
- **Tab 4: Navigation**
Both applications and links can now be placed in either the **Menu** or in **Quick Links**. Any item in the Menu may be moved to Quick Links and any item in Quick Links may be moved to the Menu. (Please see the “Customizing the Menu & Quick Links” section for more details).

New Customization Options

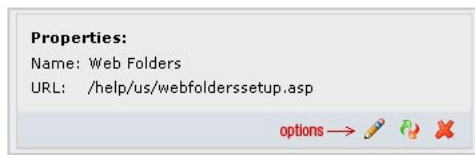
Customizing the Menu & Quick Links

Administrators may now customize the Menu and Quick Links by **adding, removing** and **reordering** items.

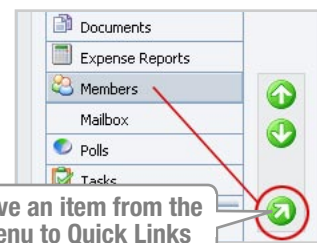
- **Repositioning a link/application**
 - To reposition the navigation links/applications at the top, “Quick Links” or left, “Menu”, of your site, select **Administration > Customize Navigation** from the Menu. The Customize Navigation screen appears:



- Click any of the items at the top or left to view a description of its properties in the Properties pane. Use this to edit, move, or remove the item (to the “Removed Items” box).



- Reorder items in the Menu area by using positioning arrows, and a northeast pointing arrow, which enables you to move a Menu item to the Quick Links area. You must first select a Menu item to enable the arrows.



New Customization Options

- When clicking on a Quick Link, the arrows for that area will enable (turn from grey to green), to allow positioning the Quick Links. Clicking the southwest pointing arrow will likewise send the Quick Link over to the Menu area. In this way, items can be interchanged between the two main navigation areas of your intranet.




You can also add separators between items in your Menu. To do this, click the **Add Menu Separator** button at the bottom of the Menu area. A separator line will be inserted, which you can then move by selecting it and clicking the up or down arrows.

Once you have positioned the item where you want it, click **Save**. To remain in Customize Navigation without returning to the Home Page, click **Apply**.


Removing a link/application

To remove an item from the Menu or Quick Links:

- Select **Administration > Customize Navigation** from the **Menu**. The Customize Navigation screen appears.
- Click the link (on the left or top) that you want to remove. The description of that link appears in the Properties pane.
- If the link can be removed, the “Remove” symbol  appears in the Properties pane. Click “Remove”. The link is moved to the Removed Items list. **Note:** You can also delete separators by selecting them and clicking the “Remove” symbol.

To permanently delete a custom link once it has been placed in the Removed Items box, select the link and click the “Remove” symbol a second time.

To remove a custom database from the Menu:

- Select **Administration > Customize Navigation** from the **Menu**. The Customize Navigation screen appears.
- Click the name of the custom database that you want to remove. The description of that link appears in the Properties pane.
- Click the “Remove” symbol .

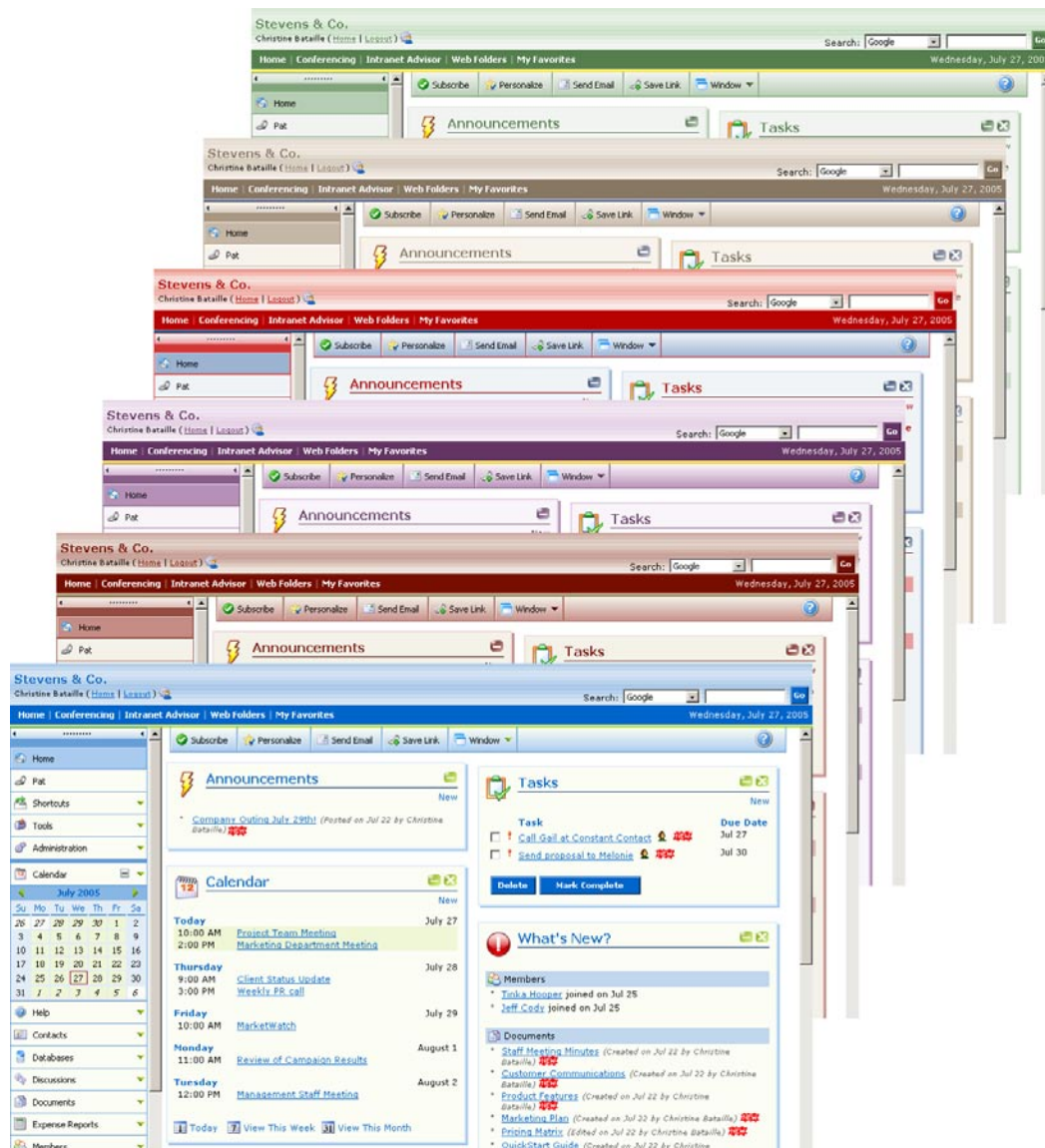
New Customization Options

New Color Schemes

Choose from more than 30 different color schemes to customize your intranet. Match your corporate color scheme, or simply choose something that you like.

To choose a color scheme for your site:

- Select **Administration > Customize Appearance** from the **Menu**.
- In the **Customize the Look & Feel** section, select one of the color schemes from the Color Scheme drop-down list and click **Save**.



Feature Notes

There are a few additional details we want you to know about how we've made your intranet easier to use and more intuitive. Below you will find details of what we've changed:

Terminology Changes

- The left Nav Bar is now called “Menu”.
- The navigation tabs at the top of the intranet are now called “Quick Links”.
- The term “Add” (e.g., Add Event, Add Database, etc.) has been replaced by the word “New” in all applications.
- “Customize it” is now called “Customize”. This link is available from the new **Command Bar**.
- **Group Links** is now called **Public Links**.

Location Changes

- **Home** has been moved to the upper left hand corner of the intranet.
- The “**Welcome**” message and member text have been removed from the Home Page. The member name is now located in the top left hand corner of the intranet.
- “Manage this Site” link has been removed. Use the **Administration** link on the Menu or click the Administrator icon in the top frame.
- The **Customize it**, **Personalize** and **Subscribe** links have been moved to the Command Bar.
- **Help** and **Logout** have been moved to the upper left hand corner of the intranet. **Help** has also been added as a Menu item.
- **Search** has been removed from the Menu and is now located in the top right hand corner of the intranet.
- **Customize Content** no longer exists (B2B Buyer's Guide has been removed). You must now use **Customize Navigation** to add/remove links from the new Quick Links.

Feature Notes

- “**Contact Us**” has been moved to **Help**. You can access it from the **Help** Action Menu.
- “**Tell Us What You Think**” has been renamed, “**Feedback**”, and is now accessible from the Menu.
- “**Tell a Friend**” has been moved to the page footer.
- **Synchronize** has been removed from the Menu. This is accessible from **Tools > Utilities**.
- **Tell A Friend** has been moved to the Home Page footer.
- **Live Person Support** has been moved to the Menu. It is accessible from the **Help** submenu and is called, “**Chat with the Help Desk.**”

Feature Details

- **My Favorites** and **Shortcuts** have been added to the Intranet Features list (**Administration > Customize Appearance**). If disabled, all existing Shortcuts or Favorites for the site will be removed.
- **My Favorites** for a member will be removed when the member is deleted (Shortcuts created by an admin, will not be removed if the admin member is deleted).
- Standard intranet applications cannot be deleted, though they can be removed from your navigation system by placing them back in the **Removed Items** box; however, members may still have access to these applications through the mini-“windows” on the home page. If your goal is to remove an application completely, you must disable it.
- Disabled applications that have been removed from the **Menu** will not appear in the **Removed Items** list.
- Databases will continue to appear in the **Removed Items** list until the database is either deleted or consistently removed from the navigation. This can be done by accessing your database’s **General Settings** page, and making sure the **Show in Menu** option is unchecked.

Feature Notes

- An administrator has permission to remove a custom database from the **Menu** whether or not the administrator has been granted access rights to that database.
- Moving applications with sub-menu items from the **Menu** area to **Quick Links** will render those sub-menus temporarily inaccessible.
- The Documents section of the “**What’s New**” window on the Home Page no longer lists all Documents. “**What’s New**” now lists documents that are new or modified with [n]days. (See the ***New & Improved “What’s New”*** section of this document for more details).
- The **Monitor Disk Storage** and **purchase additional services** links have been moved to the new Site Administration page. Use the **Administration** link on the Menu to navigate to **Disk Storage** and **More Services**.
- **Tools** is now a Menu item that opens to a new “Tools” page.
- The **Tools** Action Menu contains links to **Manage Site** and **Feedback**.

Additional Notes

- The **Intranet Directory** has been removed and will no longer be supported.
- All “**What’s this?**” links are now represented by a question mark icon.
- The **Login page** has been modified:
 - “Want to Join?” And “Just Visiting?” = “Not a member?”
 - The following have been removed:
 - ❖ “Looking for a Site?”
 - ❖ “Number of members”
 - ❖ “Created:”
 - ❖ “Last visit:”

Feature Notes

- If you use IE as your browser, you can increase the font size for your intranet by doing the following:
 - Click **Tools > Internet Options**
 - Click the “Accessibility” button at the bottom of the options window
 - Check the “Ignore font sizes specified on Web pages” box.

You can then further refine the font size by using the **View > Text Size** menu option.

