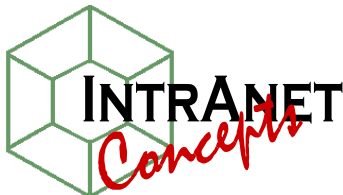


Getting Started with the



Custom Intranet



Intranet Concepts, Inc.
P.O. Box 1139
Newburyport, MA 01950-6139

Sales & General Business

Phone: 978-499-1897
Fax: 636-444-1897
Email: sales@intranetconcepts.com

Design & Technical Support

Phone: 978-499-1897
Fax: 636-444-1897
Email: support@intranetconcepts.com

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For complete instructions of this product, please visit www.intranetconcepts.com/help or click on the *Help Desk* tab in your intranet.

Copyright Information

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About this Documentation

This booklet provides the basic instructions for installing and customizing your **AGENCYCENTRAL INTRANET**. Additional details are included in the *Help Desk* section of the intranet and we highly recommend that you and your staff review them carefully.

The following symbols are used throughout this document to alert you to important notes or provide you with tips on making the installation and customization process easier:



This symbol provides a warning or special instructions that you should follow carefully.



This symbol indicates a tip that is recommended for the smooth operation of your intranet.

Significant care has been taken to provide you with the most accurate documentation possible. If clarification is needed in any of the instructions, please notify us immediately so that we may make the necessary corrections.

This software has been designed with you in mind and we rely on your feedback to make it the best product possible. Please send your suggestions, comments and, yes, criticisms about our company and products to info@intranetconcepts.com or visit us on the Internet at www.intranetconcepts.com.

Managing Your Intranet

Recommended Software

The instructions provided in this manual assume that you are using *Microsoft FrontPage* to customize and maintain your intranet. Not only does *FrontPage* allow you to easily add new pages and make changes to existing ones, but it also includes tools for managing the folder structure and checking for broken hyperlinks.

In many areas, it has become difficult to purchase Microsoft FrontPage, although many copies are still available on Amazon.com and eBay. As of January 1, 2007, we will also support the use of *Microsoft Expression Web* for maintaining your intranet. This product was developed by Microsoft to replace FrontPage and works in very much the same fashion. You are welcomed to use any other HTML editing program that works best for you — we will do our best to help you with any questions you have.

For further details, please visit our website at www.intranetconcepts.com/customize/editors.htm to decide which product is best for you.

Required Software

The **AGENCYCENTRAL INTRANET** was designed and tested using Microsoft Internet Explorer 5.5 and, therefore, contains various features that may not be compatible with Netscape or other Internet browser products. We strongly recommend that you install the latest version of Internet Explorer on all of your desktops in order to maintain consistency. You can download this free software at www.microsoft.com/ie.

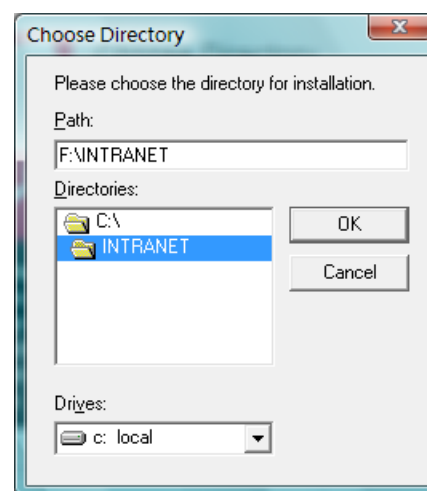
Installing Your Intranet



You should install the intranet on a mapped network drive from one of your PC workstations. **Loading the intranet on the C: drive of your server could create problems.**

Before you begin, close all other programs that are open on your PC workstation.

1. Setup will start automatically after you put the **AGENCYCENTRAL INTRANET** CD into your CD drive. If it does not start automatically or if you have received the setup file via email or download:
 - a. From your Windows desktop, double-click the *My Computer* icon
 - b. Double-click on the appropriate drive icon for the CD (or DVD) drive
 - c. Locate the **SETUP** file (or **SETUP.EXE**, depending on your computer's configuration)
 - d. Double-click on the SETUP file to begin the installation process
2. The *Welcome* screen will appear
3. Click on the **Next** button to continue
4. The license agreement screen will appear. Read it carefully and, if you agree with the terms, click on **Yes** to continue the installation
5. The *Choose Directory* screen will appear.
6. Click the **Browse** button
7. In the *Path* field, change **C:** to the appropriate drive letter for your shared network drive then click on **OK**. For example, if you are installing to your shared F: drive, the directory screen should show F:\INTRANET.
8. Click on **Next** to continue
9. The *Start Copying Files* screen will appear
10. Click on **Next** to begin the installation. The files will be copied from the CD to the network drive
11. The *Setup Finished* screen will appear.
12. Click on **Finish** to complete the setup process.
13. Remove the CD and store it in a safe place.



When you have a few minutes, check out the other files stored on the CD. There is an Extras folder containing useful tools for maintaining your intranet. Also, a complete INTRANET folder is included on the CD which matches what you just installed on your network. If you ever need to restore a single file to your intranet, you can copy it from this disk.

When you have finished installing your intranet (and the *Microsoft FrontPage* or *Expression Web* software), you are invited to call our Technical Support Team at 978-499-1897 for a quick walk-thru. It usually takes less than 20 minutes and can help acquaint you with the overall structure and answer any immediate questions that you might have.

Accessing Your Intranet



During the installation process, two icons are created on your workstation

- The first icon appears on your Windows desktop. Double-click this icon to launch Internet Explorer and load your intranet home page.
- The second icon appears on your Start menu. Click on **Start → All Programs → AgencyCentral Custom Intranet → Intranet** to open your intranet.

Adding the Intranet Icon to Each Workstation Desktop

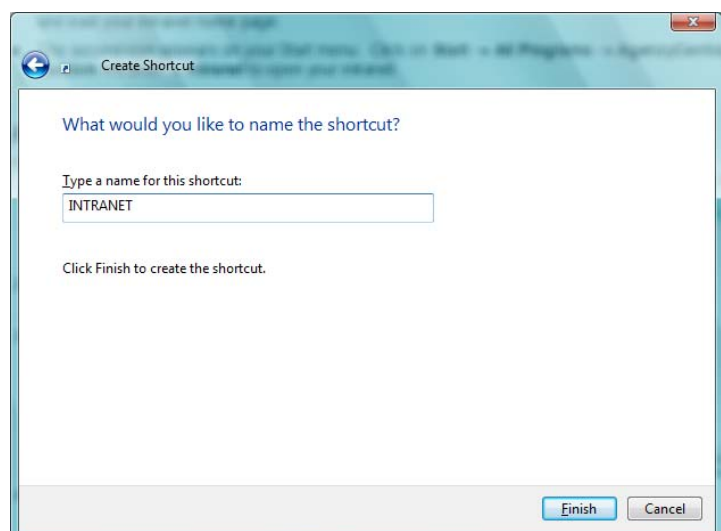
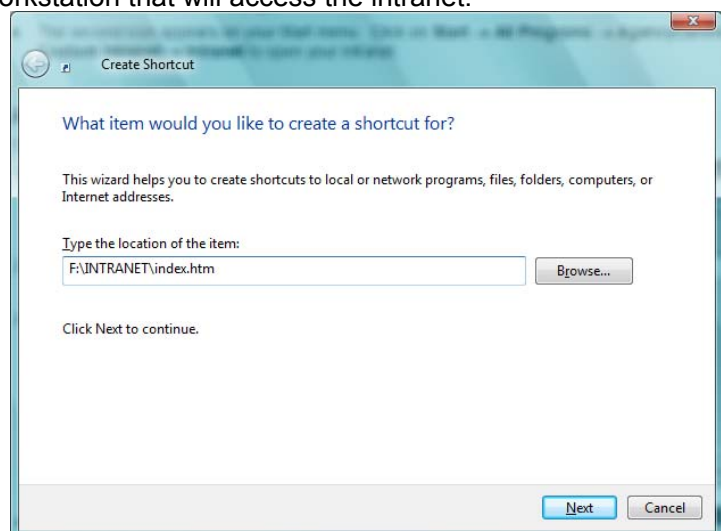
This procedure must be performed at each workstation that will access the intranet:

1. From the Windows desktop, right-click and select **New → Shortcut** from the menu that appears
2. The *Create Shortcut* window will appear
3. In the location field, type the path to your intranet home page, such as: **C:\INTRANET\index.htm**

 Note: If your intranet is installed on a different network drive, replace the c: with the correct drive letter.
4. Click on the **Next** button to continue
5. Type the name that you want to appear under the icon.
6. Click on the **Finish** button to complete the process



For easy distribution, you can email this shortcut to your staff and instruct them save the attachment to their Desktop folder.



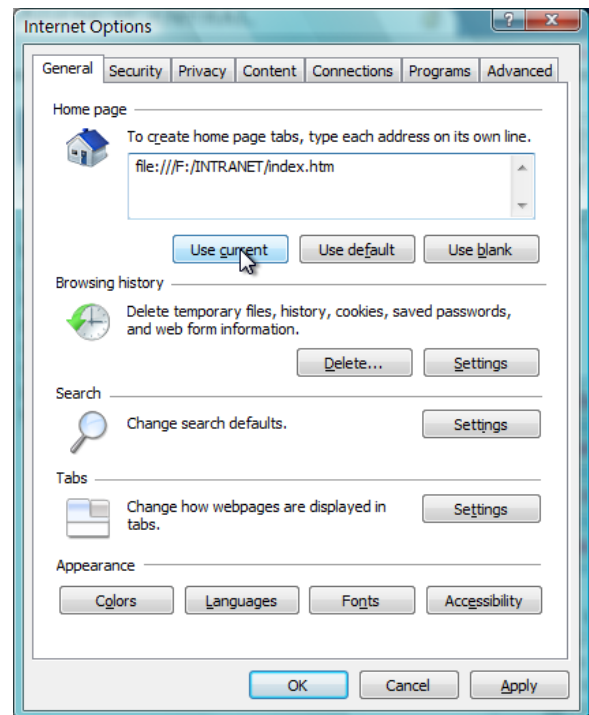
Setting AgencyCentral as Your Browser Home Page

You can also the intranet home page as your default browser home page in Internet Explorer by following these simple steps:

1. Open the intranet home page in Internet Explorer by double-clicking the desktop icon or clicking on **Start → All Programs → AgencyCentral Custom Intranet → Intranet**
2. Click on **Tools → Internet Options**.
Note: In Internet Explorer 7.0, you may need to press the ALT key to display the menu at the top of the browser window.
3. On the *General* tab, click on the **Use Current** button. The contents of the *Address* field will change to reflect the path to your intranet home page.
4. Click on **OK** to save your changes and close the *Internet Options* window



From now on, when you click the **Home** button on your Internet Explorer toolbar, the intranet home page will appear.



Launching the Intranet on Startup

If you wish to enable the intranet to open automatically when the PC is turned on, you need to add the intranet shortcut to your Startup folder. Here are the instructions for Windows XP — they may differ on other operating systems.

1. Right-click on the **Start** button and select **Open**
2. Double-click the *Programs* folder
3. Double-click the *Startup* folder
4. Click on **File → New → Shortcut**
5. In the location field, type the path to your intranet home page, such as: **F:\INTRANET\index.htm**
6. Click on the **Next** button to continue
7. Type the name that you want to appear under the icon.
8. Click on the **Finish** button to complete the process
9. When you restart your workstation, the intranet should open automatically.

Customizing Your Intranet

The **AGENCYCENTRAL INTRANET** has been designed for agencies that want a working structure on which to build a customized web of internal information.

The **Help Desk** section provides details on customizing various pages, as well as tips for helping your staff become familiar with the powerful features of the intranet.

To help you get started, here are the instructions for customizing the some of the special pages in the intranet web:



These procedures must be done from a workstation that has *Microsoft FrontPage* or *Expression Web* installed on it.

Opening AgencyCentral for Editing

1. Double-click on your intranet icon to launch the home page in Internet Explorer.
2. Click on **File** → **Edit with Microsoft FrontPage** (or **Edit with Expression Web**)
Note: If this prompt does not appear, you will need to install the software on the workstation.
3. When FrontPage is finished loading your intranet home page, the folder list should appear on the left side, displaying the complete intranet structure. If it doesn't, press **ALT+F1** to toggle this folder list on and off.



In some instances, FrontPage loads only the current page instead of the entire folder structure. If this happens, click on **File** → **Open Site** and select the INTRANET folder on the network drive. Click on **Open** and it should display a message, telling you that FrontPage needs to install files. Click on **OK** to continue. Once this process has been completed, you should be able to use the **File** → **Edit with Microsoft FrontPage** option in Internet Explorer whenever you want to update your intranet.

Intranet Home Page

Your Home Page is the first page of the intranet that you view. It actually displays other pages within "frames," such as:

top.htm	This file contains the top border which includes the home icon and departmental folder tabs
contents.htm	This is the main section of your intranet, which includes the agency logo, calendar, tips and Web buttons, as well as embedded frames for Daily News, random quotes and the Employee Directory.
contacts/agency.htm	This file contains the Employee Directory page, which is displayed on the home page as well as in the Contacts section of the intranet.

In order to edit a portion of this home page, you must first open the correct file (as shown above) then make your changes and click on **File** → **Save**. The changes will appear automatically when you access the intranet home page in Internet Explorer. If necessary, press **F5** to "refresh" and reload the page with your changes.

Top Frame (Tabs)

You will notice that every page in the intranet contains the same information. This information is stored in the **top.htm** file of your **INTRANET** folder. Here are a few ideas for information that you can include on this page:

- Agency Name
- Agency Address
- Telephone and Fax Numbers
- Web Site Address (if applicable)
- Link to your Office Directory (stored by default as [branch/index.htm](#))

Depending on the amount of information involved, you may need to change the font.



On many older monitors, which are usually set to a low resolution, the entire top border (containing the department tabs) doesn't always fit on the screen. This results in horizontal scroll bars, which are unacceptable for daily use. If this is the case in your office, we recommend that you edit the **top.htm** page to remove the AgencyCentral graphic. You may replace the AgencyCentral graphic with another image, however, it should not exceed a height of more than 22 pixels.

Daily News

This section appears in the left column of your intranet home page. It is important that you keep it up-to-date because it's the first page that your staff will see when they open the intranet each day.

1. Open the following file in your main **INTRANET** folder: **contents.htm**
2. Type your news items in the table provided on this page, using a separate row for each item. If your news item refers to another page in the intranet (either existing or added for more details), be sure to hyperlink one or two of the keywords in the news items to that corresponding page.
3. When you are finished, click on **File → Save**
4. The changes will appear automatically when you access the intranet home page in Internet Explorer. If necessary, press **F5** to "refresh" and reload the page with your changes.

Departmental Home Pages

Each department's home page in your intranet contains an **index.htm** that serves as the "home page" for the specific department. Each folder also contains a **whatsnew.htm** file for displaying the department's "bulletin board," a place where you can communicate relevant news and information to your staff. It is important to keep this bulletin board up-to-date since it's the first page that users see when they visit a department.

To update this What's New section, open **whatsnew.htm** and type your changes. Save them and close the page. When you display this department home page in Internet Explorer, your news items will appear on the right side of the page.

Updating the Contacts Pages

The *Contacts* section consists of several pages with tables that provide contact information for the various categories. With respects to the Agency Contacts page, a section of it also appears in the right column of your intranet home page and provides a quick-reference list of the employees' names and telephone extensions. In order to update this page, follow these steps:

1. Open the following files in your INTRANET\contacts folder:

agency.htm	Employee List
claims.htm	Claims List
reflist.htm	Internal References List (ie: Services)
vendors.htm	Vendor List

2. These pages contain a table with the columns for names, numbers, etc. You should edit the table in the same manner as you would edit any other table.

3. To link an e-mail address to an individual's name:
 - a. Select the name (drag your mouse over it)
 - b. Click on **Insert** → **Hyperlink** (or press **CTRL+K**)
 - c. Click on the **E-Mail Address** icon in the bottom left corner of the *Insert Hyperlink* screen.
 - d. Type the email address and click on OK to close the window

4. The name should now appear as a hyperlink

5. When you are finished making changes, click on **File** → **Save**



If you add new Contacts pages, you must add hyperlinks to these new files in the **contents.htm** file (also stored in the *Contacts* folder)

Password-Protecting Areas of Your Intranet

We recommend that you use your network software to restrict access to any areas of your intranet which may contain sensitive information. Since all networks are configured differently, we are limited in our ability to support this matter. We strongly urge you to refer to your system administrator or network consultant for assistance in setting up the necessary permissions for individual intranet subfolders. Alternately, you can leave the folder unprotected and simply add password protection to any Word or Excel documents that you store in the folder.

Creating New Pages

A **newpage.htm** file is included in each folder on your intranet and should be used as a “template” for adding new pages. It contains the standard formatting that will help you maintain a consistent style throughout the entire web.

Create the page

1. Decide in which folder the new page will be
2. Click on the **Folders** icon and locate the appropriate folder
3. Double-click the **NEWPAGE.htm** file in that folder to open it in *Page* view
4. *Immediately* click on **File** → **Save As**
5. Type an appropriate name for the new file
6. Click on the **Change** button and type a title for the new file. It should coincide with the title that you will type in the blue title bar on the page.
7. Click on the **Save** button
8. The system will automatically add an “.htm” extension to the file to indicate that it is a web file. This new name will appear in the title bar of the document window.
9. Add your content to this new page
10. Click on **File** → **Save** to preserve your changes
11. Click on **File** → **Close** to exit this new document

Create the hyperlink

1. Open **contents.htm** in the folder that contains the new page
2. Move your cursor to where the link should appear
3. Type a 2-3 word description of the page
4. Select the description by dragging your mouse over the text (it will appear highlighted)
5. Click on **Insert** → **Hyperlink** (or press **CTRL+K**)
6. Click on your new page to select it
7. Click **OK** to insert the hyperlink — the description will now appear as a hyperlink

Getting the Help You Need

We hope that this manual has helped to provide an overview of the steps involved in maintaining your intranet. The **Help Desk** section of the intranet provides more detailed instructions on various topics.

Depending on how your intranet was customized, you may have a *Help Desk* tab or link in the top frame of the intranet. If not, click on the *System* (or *IT*) tab and locate the **Intranet Help Desk** link there. To create additional links to this online help desk, use this as your hyperlink: help/index.htm

After your 30 days of free support has expired, we will invite you to consider signing up for ongoing support and training as an Agency Partner. This will give you a “safety net” as you continue to learn how to update and maintain your intranet.

With the Agency Partnership program, you can sign up for as little as three months so there is no long-term commitment. You may want to consider becoming an Agency Partner until you are comfortable with the intranet process. After the initial 90-day period, all we require is 30 days written notice when you want to terminate the support contract.

If you decide that you would rather not take advantage of this monthly service, you are welcomed to call or email us on a pay-as-you-go basis and we will simply bill you at our standard hourly rate for any time that we spend working with you.

For further details on our Agency Partnership program, please visit www.intranetconcepts.com/support.

The **AGENCYCENTRAL INTRANET** has evolved into a dynamic agency tool in large part because of the excellent suggestions and ideas we have received from our clients. We are always looking for new ways to improve this product and welcome your input. Call us at 978-499-1897 or send an email to support@intranetconcepts.com.