DayPoint Enterprise v3 Administrators QuickStart Guide

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System Architecture

Groups

In rolling out DayPoint Enterprise, the first major implementation step is to determine how to share information within your organization. DayPoint Enterprise helps manage information sharing by allowing organization administrators to assign users to one or more Groups. Based on their Group membership, users can share information, such as event details and contact records. Therefore, the creation of appropriate Groups must be based on the information sharing needs within your organization.

DayPoint Enterprise Groups are typically based on already existing group distinctions in your organization, such as the following:

- Departments
- Major clients or customers
- Your entire organization (often called "Everybody")
- Common interests, such as 401(k) participants or stock option holders

You may have other group categories that are appropriate to your organization.

Calendar Sharing

Once you have established the appropriate Groups for your organization, you need to establish several settings that determine exactly who can see and modify other users' calendars:

1. Whether a user can view another user's calendar is dependent on the "Show Calendar Users" and "Show Calendar Groups" settings on the Site tab of the Admin module.
   - Users can view other users' calendars based on the selection made in the "Show Calendar Users" dropdown:
     - All Active Users – a user can view all other users' calendars
     - Only Group Members – a user can view only the calendars of users who are members of one or more of the same Groups as the user
     - None – a user cannot view any other users' calendar
   - Users can view the Group Calendars based on the selection made in the "Show Calendar Groups" dropdown:
     - All Active Groups – a user can view the calendars of all groups
     - Only Assigned Groups – a user can view the calendars of groups of which he is a member.

2. The user's role as an Organization Administrator or Group Administrator determines his ability to modify calendars, as described in the table below.

- Organization Administrator: A user is set up as an Organization Administrator under the Admin Module on the Users tab. For details on this option, see the "Manage User Accounts" section below.
- Group Administrator: A user is set up as a Group Administrator the Admin Module on the Group tab. For details on this option, see the "Manage Groups" section below.

Calendar Accessed	**Required Privileges for Adding Event**	**Required Privileges for Updating / Deleting Event**
User's own calendar	User can always add events to his own calendar	User can always modify events in his own calendar
Another user's	User is an Organization Administrator	User is an Organization Administrator
Group to which user belongs	User is a Group Administrator or Group has "Add" privilege	User is Group Administrator or Group has "Edit" privilege
Group to which user does not belong	User is an Organization Administrator	User must be an Organization Administrator

3. There are two settings on the Group setup that enable "Add" and "Edit" privileges for the Group's calendar. These setting are found under the Admin Module on the Groups tab. For details on these settings, see the "Manage Groups" section below.

Site Administration

DayPoint Enterprise allows the creation of multiple virtual “Organizations.” An “Organization” appears to be a completely independent installation of DayPoint Enterprise to the members of that Organization. This allows a single DayPoint Enterprise installation to support many companies and organizations, ensuring that each organization’s information is kept separate from all other companies. The details of setting up separate virtual Organizations are explained in the “Sites” section, below. Note that the multiple virtual organization capability is available only with the DayPoint Enterprise ASP subscription.

There are several terms that are used in this discussion that you need to understand:

- Site Administrators – manage the entire DayPoint Enterprise installation
- Organization Administrators – manage a single virtual Organization within the DayPoint Enterprise installation

System Settings

To access the system setup immediately after completing the installation, open http://www.yourdomain.com/dpent/system/system.asp in a browser. Note: The installation program disables anonymous access to the /system/ folder in IIS so that only site administrators can access it. You will need Windows administrator account credentials to access this page.

The System Settings tab controls all Organizations within this installation of DayPoint Enterprise. Organization Administrators may make Organization settings more restrictive than the ones here, but not less restrictive. While most field entries are self-explanatory, the following describes those entries that may not be as obvious:

Server Timezone

Select the time zone that the server will use as the local time zone. This is likely the time zone in which the server is located, or you may choose Greenwich Mean Time.

Default Date and Time Formats

Select the default formats for dates and times. These values will be the defaults for each virtual organization within the DayPoint installation, although each organization administrator can change the default for his organization.

System Domain

Enter the domain for this installation of DayPoint Enterprise. This will allow you to create sub-domains for each Virtual Organization you create, as described below in the “Sites” section.

Mail Send Method

Establishes the method that the DayPoint Enterprise uses to send outgoing email. Chose one of the following:

- **CDONTS** (included in IIS in Windows 2000 and Windows NT) does not require any account authentication. More Spam sensitive email servers may not accept emails delivered by CDONTS, especially if the "From" email address is from a different domain. Note: if you are installing DayPoint Enterprise on Windows 2003, you'll need to copy the file **cdonts.dll** from a Windows NT or Windows 2000 machine to the /windows/system/ folder and register it to use CDONTS for outgoing email.
- **EasyMail** (installed with DayPoint Enterprise) is a third-party email component. Selecting EasyMail as your Mail Send Method requires that you specify valid SMTP server information for every user email account you create, as well as the "system account" in the Site tab, explained below.
- **ASPMail** is a third-party email delivery component that you may purchase elsewhere. Selecting ASPMail as your Mail Send Method requires that you specify valid SMTP server information for every user email account you create.

Mail Receive Method

Establishes the method that DayPoint Enterprise uses to receive incoming email. Chose one of the following:

- **EasyMail** (installed with DayPoint Enterprise) is a third-party component that manages the downloading of email from POP3 or IMAP email servers.
- **ASP Mail** is a third-party component (that you may purchase elsewhere) that manages the downloading of email from POP3 or IMAP email servers.

File Uploading

Mark the Permit Upload checkbox to allow users to upload files to DayPoint Enterprise's Files Module.

Upload Method

Choose from the following options:

- **ASPSmartUpload** (installed with DayPoint Enterprise) is a third-party component that manages file uploads.
- **SA-FileUp** is a third-party component you may purchase elsewhere to manage file uploads.

Denied File Extensions

Enter the file extensions that you will not allow to be uploaded. List the file extensions separated by commas.

File Upload Limit

Set the disk space available for file uploads for each organization.

User Upload Limit

Set the disk space available for each user to store uploaded files.

Mail Message Limit

Set the upper limit on the size of an email that can be sent or received by a user.

User Mailbox Limit

Set the upper limit on the size of a users mailbox.

Mail and Files Store Directory

Enter the full local path to the directory where you want uploaded files and email attachments to be stored. The installation program will set the appropriate permissions for this folder, but you can test the permissions by clicking the Test link.

Mail Footer Text

Enter the default text to be added to all outgoing email messages. Each organization administrator and user can modify this text for his own outgoing messages.

Exit URL

Enter the full URL that users will be redirected to on logging out of DayPoint Enterprise. Each organization administrator can override your entry here with his own Exit URL.

Allow New Users checkbox

If you want to allow users to create their own new user accounts, mark this checkbox. Leave this unchecked if you want the system administrator to enter users manually or to integrate DayPoint Enterprise with your Active Directory or Windows NT domain. Checking this box creates a “Create New User” link on the login page, allowing anyone to create his/her own User Account.

Authentication Method

Select the method to use to authenticate user logins.

- System database – create and manage user accounts through the DayPoint Enterprise Admin module
- Windows Active Directory, or Windows NT domain – authenticates users against the specified Active Directory or NT Domain. On the user’s first attempt to access DayPoint Enterprise. The DayPoint Enterprise Users table is populated with the user’s Active Directory or NT Domain information.

Sites

The Sites tab allows the Site Administrator to create many "virtual" organizations within a single DayPoint Enterprise installation. The DayPoint Enterprise install creates the first organization, called “site1.” To create additional "virtual" organizations, click the Add button.

The Organization Details page includes many settings that are described in the "Organization Administration" section below. It also includes several settings that are reserved for Site Administrators. These Site Administrator only settings are described here. The remaining settings are described in the **Virtual Organization Administration** section below.

Organization Site URL (subdomain name)

Subdomain name is the string that identifies the virtual organization within DayPoint Enterprise. With the proper DNS settings, the organization can be accessed through http://subdomain.domain.com. To enable the subdomain name, enter an A record on your DNS server that points to the IP Address of DayPoint Enterprise. DayPoint Enterprise will resolve http://subdomain.domain.com to the correct virtual organization.

Alternatively, the organization can also be reached through a query string in the form http://www.domain.com/login/login.asp?orgurl=subdomain, where subdomain is the entry in the Organization Site URL field.

Admin Account

Enter the credentials for the initial user account in the new virtual organization. This account has full administrative rights within the organization.

Change TeamPoint Branding

These settings allow a Site Administrator to remove the TeamPoint branding displayed in the vertical menu within DayPoint Enterprise and replace it with his own branding image, text and hyperlink.

Strings

DayPoint Enterprise is fully internationalized and the labels and strings used throughout are rendered from XSL stylesheets installed on the webserver. The data in these stylesheets is drawn from the DayPoint database, which is shown on the **Strings** tab. DayPoint Enterprise supports eight languages as installed, Dutch, English, French, German, Italian, Norwegian, Portuguese and Spanish. You should not need to make any changes to the strings.

However, if you do want to change any text displayed within DayPoint, you'll need to locate the string that produces the text. You can use the **Search** feature on the **Strings** tab to locate the appropriate label. Click the **Label ID** link to edit the label for the languages. Make the appropriate changes to the text and indicate the modules in which the string is used (hold the Ctrl key to make multiple selections) and click the **Save** button.

Once all strings have been updated, click the **Generate Labels…** button to update the XSL stylesheets with your changes.

License

Upon the initial installation, DayPoint Enterprise will function normally for 30 days on a trial license. However, for you to access DayPoint Enterprise beyond the 30-day trial, you must request and update a license key. TeamPoint will generate a license key based on the configuration of DayPoint Enterprise you purchased and the **Computer ID** shown on this page. The Computer ID identifies the server hardware on which DayPoint Enterprise is installed, and the IP address and domain names used to access DayPoint Enterprise. Once created, the license key will remain valid as long as one of the three identifying items (server hardware, IP address, domain name) is unchanged. If all three of these items change, your license will revert to localhost mode. In localhost mode, DayPoint Enterprise can only be accessed using the following URLs: http://localhost/dpent or http://127.0.0.1/dpent.

Updates

Links to the TeamPoint website to display a version history of DayPoint Enterprise v3. Also compares the installed version with the current version, alerting you when an update is available.

Scheduled Tasks

The installation of DayPoint Enterprise creates two scheduled tasks that run on the webserver. These tasks run Visual Basic scripts that are used by DayPoint Enterprise to check for event reminders that need to be emailed and to automatically download email from users' POP3 email servers. By default, these scheduled tasks are enabled.

DayPoint Reminders

This scheduled task runs every 5 minutes and executes "reminders.vbs" that is located in the DayPoint root installation folder. This script sends email reminders for upcoming events, as defined in the event details.

DayPoint POP3 Poller

This scheduled task also runs every 5 minutes and executes "pollpop3.vbs," also located in the DayPoint root. This script downloads email from POP3 servers for those users who indicate that they want their email checked automatically.

Application Configuration Settings

A configuration file, called config.asp and installed in the /config folder, initializes many application-wide settings. Editing these settings will allow you to customize the way that DayPoint Enterprise runs. These settings are explained below. However, TeamPoint does not recommend making any other modifications to this file. Doing so may render your installation unusable. **Always make a copy of config.asp before editing it.**

ConnectionString and CustomSessionConnectionString

These two settings establish the connection to the DayPoint Enterprise database and should be set during the installation process. The values of these two variables should be the same:
Provider=SQLOLEDB;Server=servername;Database=dpenterprise;UID=sa;Pwd=sa;

- **Provider=SQLOLEDB** – identifies the SQL Server ODBC driver
- **Server=servername** – the name of the SQL Server on which the DayPoint database resides
- **Database=dpe3** – the name of the DayPoint database, dpe3 is the default value

- **UID=sa** – the SQL Server user account
- **Pwd=sa** – the UID account password

CustomSessionUseCookie

If this variable is set to **True**, DayPoint Enterprise will store the Session ID in a cookie on the user's computer. If set to **False**, the session ID is passed to each page through a querystring value. Using a cookie will slightly improve performance, since a query to the database for each page load will be avoided. The querystring will be displayed whether this variable is set to True or False.

CustomSessionDebugMode

Set this variable to **True** to display debug information related to the Session to the user when an error occurs.

CustomSessionDisableIPCheck

Set this variable to **False** to have DayPoint verify the user's IP address for each action. This check guards against a "session high-jack."

VirtualSites

Enable multiple virtual sites by setting this variable to "yes".

DebugMode

Set this variable to 1 to display detailed debug information to the user when an error occurs. Set it to 0 to display generic browser errors.

CDONTSRetry

Set CDONTSRetry to 1 to have DayPoint Enterprise retry sending outbound email using CDONTS if the active mail account does not successfully send a message. Set it to any other value to disable the retry.

IMailLockAccounts

This setting applies only when the **Use Third-Party Email System** dropdown on the **Sites** tab of the **Admin** module is set to IMail. When this variable is set to 1, the **Accounts** and **Account Details** pages cannot be edited by a user.

bForceServerTransform

Set to **True**, this variable will force server-side XSLT transformations for Internet Explorer. All other browsers are transformed on the server regardless of this setting.

UpdateURL

This URL links to the TeamPoint website where a complete version history of DayPoint Enterprise v3 is located. This value should be http://www.teampointsystems.com/support/dpev3upgrade.asp.

DemoMode

When set to **True**, this variable prevents some administrative changes from being saved.

PreventPastEvents

When set to 1 (True), DayPoint Enterprise will not allow an event with a date and time in the past to be saved.

ContactRequireName

When set to 1 (True) an entry in the last name field is required to save a new contact record.

ContactRequireEmail

When set to 1 (True) an entry in the email address field is required to save a new contact record.

ContactRequirePhone

When set to 1 (True) an entry in the work phone number field is required to save a new contact record.

EventDefaultTZ

When set to 1, the time zone of a new event will be that of the user creating the event. When set to 0, the user will have to select a time zone for the event before it can be saved.

NewUserNotify

If set to **True**, DayPoint Enterprise will send an email to the site administrator when a new user creates an account.

ProtectAdminEvents

When set to **True**, makes any event created by a site administrator read-only, regardless of the group security settings.

DisallowedForumHTML

Specifies the HTML tags which will be disallowed in discussion forum posts.

Login Query String Options

Normally, users will access the DayPoint Enterprise login page by accessing the base URL you establish, such as http://subdomain.domain.com. This will bring the user to the standard DayPoint Enterprise login screen where he will enter his username and password. On logging in, the user will be taken to his DayPoint Home page. However, specifying one or more querystring variables in a link the user clicks will provide an alternative method for accessing DayPoint Enterprise. The result of the login depends on the details in the querystring, as described below. These variables can be included in any combination.

OrgURL

If you have multiple virtual organizations and choose not to create subdomains on your DNS server for each organization, you can use the OrgURL variable to specify the virtual organization to access. Use this form:

http://www.domain.com/login/login.asp?orgurl=sitename, where sitename is the **Organization Site URL** specified on the **Sites** tab of system.asp.

Bypass Login Prompt

You can allow a user to bypass the login page by specifying his DayPoint account credentials in the querystring, in the form ../login.asp?u=username&p=password.

Language Setting

When used in conjunction with the U and P querystring variables to pass account credentials, the "lang" variable sets the language to use for that user session. Add "&lang=XX" to the querystring, where XX is the language to display, as listed below:

- Dutch: NL
- English: EN
- French: FR
- German: DE
- Italian: IT
- Norwegian: NO
- Portuguese: PT
- Spanish: ES

Target Page to Display on Login

When using the querystring to pass account credentials, you can also specify the page to display instead of the Home page by adding the "&menu=" variable. The acceptable values for menu are:

- Home
- Calendar
- Contacts
- Mail
- Links
- Files
- Options
- Admin

If you use "&menu=calendar" you can also specify the calendar view and date to display. To set the view, use the variable "&tab=" with one of these values:

- Day
- Week
- Month
- Year
- Events
- Tasks
- Search
- Options

To specify the date to display in the calendar view add "&date=YYYYMMDD".

Example

As an example, this URL:

http://demo.teampointsystems.net/login/login.asp?u=jtaylor&p=daypoint&menu=calendar&tab=week&date=20050329

will log user “jtaylor” into the virtual organization “demo” on http://www.teampointsystems.net. The first page the user sees is the calendar week view that includes March 29, 2005.

Custom Content

DayPoint Enterprise provides a method for Site Administrators to provide customized content within the DayPoint Enterprise window, preserving the DayPoint page layout elements.

Create Custom Content

First, copy the file ‘custom.asp’ located in the /custom/ folder. This file is the template for your customized page. Write your custom content in the portion of the page between the **Any custom code goes below** and **End of the custom code** comments. You can write HTML or ASP code to produce your page.

Create Menu Label

On the **Strings** tab of /system/system.asp, click the **Add** button and create the label for the new menu item. Highlight all the modules to ensure that the new menu will be available throughout DayPoint. Click the **Save** button to save your changes. Once you have created the label, you’ll need to update the xsl files that render the pages. Do this by clicking the **Generate Labels…** button on the **Strings** tab.

Create Menu Database Records

There are two tables that hold menu data, **Menu**, which identifies all the menu items, and **MenuOrgPrefs**, which associates the menu items with the virtual organization(s). To create the new menu item follow these steps:

1. In SQL Enterprise Manager, open the **Strings** table, querying for the new label you created above. Record the value in the **Item** field for the new label. Close the **Strings** table.
2. Open the **Menu** table and create a new record for the new menu item.
   - **ModuleTabID**: Use the next sequential integer.
   - **ModuleTabLink**: Enter the appropriate relative or absolute path to the custom page.
   - **ModuleTabName**: Enter a name for this menu item.
   - **StringID**: Enter the value for **Item** from step 1 above.
   - **AllowHide**: This determines if this menu item will be listed in the **Site Modules Customization** section of the Admin module, Site tab, allowing you to remove it from the menu. Enter 0 to exclude the new menu item from the **Site Modules Customization** list, 1 to include it.
   - **MenuOrder**: Enter an integer to indicate where in the menu the new item should appear.
3. Open the **MenuOrgPrefs** table. Verify that a record for the new menu item was added for each Virtual Organization. Change **Visibility** to ‘0’ for any organization

that should not have access the new menu. Determine the appropriate **OrgID** from the **Organizations** table.

Passing the Session ID

If you are using the cookie-less implementation (which is the default), you need to pass the session ID to other pages through the 'sid' query string variable. For example, a link to 'yourpage.asp' should be written:

```
<a href="yourpage.asp?sid=<%objSession.SessionID%>">Link to Your Page</a>
```

Virtual Organization Administration

Initial Log In Instructions

To log into the first DayPoint virtual organization

1. Go to http://www.mydomain.com/dpent/login/login.asp.
2. You will be prompted for a user name and password.
3. Enter ‘admin’ for user name and ‘daypoint’ for password. Note: Once you successfully log in, you should change the admin account password in the Admin module on Users tab.

Virtual Organization Administration

To access the Site Setup, click **Admin** in the menu on the left side of the screen, and then click the **Site** tab at the top of the Admin Module. This will allow you to specify settings that affect how DayPoint Enterprise appears to your users.

Purge Calendar Events

The Org Administrator can manually purge old calendar events by specifying the age of the events to be deleted and clicking the Purge button. This is a manual operation and does not occur automatically.

Organization Name

Enter the name of the virtual organization. This string will be displayed on the login page and other places throughout DayPoint Enterprise.

Exit URL

The default entry here is taken from the System Settings tab on /system/system.asp. In this field, you can specify a different URL for users to be directed to when they log out. This entry applies only to this virtual organization.

Address

Enter the address information for the location responsible for DayPoint Enterprise.

Organization Profile Preferences

Set the virtual organization’s default language, time and date formats and time zone here. Each new user account will have these default settings. Individual users can change these settings for their own account.

Authentication Settings – Allow New Users

Marking this checkbox will add a link to the login page so that new users can create their own DayPoint user accounts. Unmarking this checkbox will require an administrator to create all new user accounts.

Authentication Settings – Allow Group Admins to Create New Accounts

Marking this checkbox will allow users designated as Group Administrators to create new user accounts. They will be limited to assigning users only to the groups they administer. Unmarking this checkbox will require that all new user accounts be created by Org Administrators.

Authentication Settings – Authentication Method

Select the method to use to authenticate user logins.

- System database – create and manage user accounts through the DayPoint Enterprise Admin module
- Windows Active Directory, or Windows NT domain – authenticates users against the specified Active Directory or NT Domain. On the user's first attempt to access DayPoint Enterprise. The DayPoint Enterprise Users table is populated with the user's Active Directory or NT Domain information.

Authentication Settings – Require User to Change Password Each

This setting requires that users update their password periodically. Enter the life of a password in the field or enter '0' to not require users to change their password.

Audit Settings

Certain activity can be logged through the Audit Trail. To enable the Audit Trail, highlight the modules in which you want activity logged, using the **Ctrl** key to select multiple modules.

Email Preferences (System Mail Account)

The fields **Mail Server**, **Mail Account Name**, **Mail Password**, **Re-enter Password** and **Mail Address** define the email account to be used by DayPoint Enterprise to deliver system messages, such as event reminders. This can be the administrator's email account or a generic account setup specifically for the purpose of sending DayPoint System messages.

Email Preferences (Default Account Info)

The remaining fields in this section define the default mail account settings for new user accounts. If the **Auto Create Mail Account** checkbox is marked, DayPoint Enterprise will use the default settings here to create a mail account for the user. For **User mailbox limit (per user)**, enter the amount of storage allocated for each user's inbox. Note that the maximum value that can be entered here is established by the site administrator on the /system/system.asp page.

For **Mail Footer Text**, enter the text to be placed at the bottom of each outgoing email message. This entry is the default for each new mail account created, but each account can be modified individually.

Use Third-Party Email System

This section allows you to integrate the DayPoint Enterprise email module with your IMail or Mail Enable email server. If you are not going to integrate DayPoint mail with IMail or Mail Enable, you do not need to make any selections here.

File Upload Preferences

Mark the **Allow file upload** checkbox to allow users to upload files to DayPoint Enterprise's Files module. In **Deny uploading files of type**, specify the file extensions of any types of files that you want to restrict from being uploaded. List them separated by commas, without any periods. For the File upload limit fields, specify the maximum amount of storage (in MB) available in the Files module for each Group and User.

Allow Personal items

Marking this checkbox will allow users to create events and tasks and mark them as 'personal.' Leaving this checkbox unmarked will require that events and tasks be shared with a Group.

Enable Only Custom Lists

DayPoint Enterprise allows you to create the entries lists for **Event Type**, **Company Type**, **Company Territory**, **Company Rating** and **Company Source of Lead** and the list of **Resource Types**, in addition to the default entries that are pre-populated. You can discard those pre-populated lists and use only your entries by marking the checkbox for each list. Leaving the box unmarked will allow you to use the pre-populated entries in addition to your own entries. To edit the lists, click the **Open** link under **Manage Custom Lists**. A popup window will appear, allowing you create, modify and delete your custom entries for the list.

Note: If you do mark any checkbox, you MUST create at least one entry in the associated list. If you do not, you will not be able to create events or companies that require a selection from that list.

Calendar

The selections here customize how your users will access the shared portions of the Calendar.

- **Show Calendar Selection** determines how the calendar selection drop-down lists will appear. These drop-downs allow users to select which other user's or group's calendar to view.
  - **Group and User DD** option shows two-drop down lists, one showing Groups and one showing Users.
  - **Single DD (only for small sites)** shows only one drop-down list that lists both Groups and Users.
- **Show Calendar Users** determines which other users' calendars are available for a User to view. A User can always view his or her own calendar.
  - **All Active Users** makes all users' calendars available to all other users. Individual events may or may not be viewable to all Users, depending on the settings on the specific event.
  - **Only Group Members** limits the list of users' calendars to only those other users who are in the same Group(s) as the User.
  - **None** limits each User to viewing only his own calendar.
- **Show Calendar Groups** determines which Group calendars a user can access.

- **All Active Groups** allows a User to see the calendars of all active Groups. Individual events may or may not be viewable depending on the settings of the specific event.
- **Only Assigned Groups** limits a User to seeing only the calendars of the Groups to which he belongs.

Site Module Customization

Sites Module Customization checkboxes determine which modules are available within the Virtual Organization. Mark those checkboxes for the modules you wish to make available.

Auto Assign Users to Group(s)

Select the groups to which new Users will be assigned automatically when the new User Account is created. This setting is useful if you choose to allow members to create their own User accounts through the **Allow New Users** checkbox above.

Show in Directory

Specify which other users a user can see in the DayPoint Directory.

- **All Active Users** will make all users available in the Directory
- **Only Group Members** will restrict the users shown in the Directory to users who are assigned to the same Groups as the User

New User Defaults

These settings allow the Org Administrator to set default values for new user accounts. Any account created will take these values. Individual users may change these defaults after they login to DayPoint Enterprise

New User Defaults – Default Contacts View

Select the default view of contacts users will see when accessing the Contacts module.

New User Defaults – Style

Select the layout and color schedule for new user accounts.

New User Defaults – Number of Records per Page

Enter the length of lists to be displayed on each page where a list is shown.

New User Defaults – Home

This setting determines what is displayed in each of the DayPoint Dashboard modules. Select **Show Since Last Login** to show only those items that are new since the last time the user logged in. Select **Show for this Number of Days** and enter a number to include items within this scope in the DayPoint Dashboard.

Manage User Accounts

To manage DayPoint User accounts, click the **Users** tab in the **Admin** module. Click the **Add** button to create a new user account or the users Full Name or User Name to edit a user's account. To delete a user, mark the checkbox by that user and click the **Delete** button.

User Details

The User Detail section contains five screens to define a user account:

- **User** to specify the required information for a user account
- **General** for work-related directory information (address, email addresses, phone numbers), entries here are shown in the **Directory** module
- **Personal** for personal contact information
- **Groups** to assign the user to one or more DayPoint groups
- **Accounts** to specify one or more email accounts for the user

User Tab

Create a User Name to identify the user within DayPoint. User Names may have spaces and numbers as well as letters. Enter and re-enter a password for the user. User names and passwords not case sensitive.

A valid email address is required for each user, since much of the capability of DayPoint is delivered through email messages.

Mark the **Organization Administrator** checkbox if this User is to perform administrative functions for the Organization. For security reasons, carefully consider who is given these privileges.

Mark the **Active** checkbox to activate this user account.

Mark the Read Only box for Users who are limited to viewing the calendar Day, Week, Month, Year, Events, and Options tabs without additional menus. This is ideal for publishing schedule data to public web sites.

General and Personal Tabs

Enter the appropriate information for each user. Note that the User can add this information in the Options module.

Groups Tab

Select the Groups this User should be assigned to by clicking the **Add/Remove** button. In the pop-up window, highlight the groups to assign this user to in the left pane and click the **>>** button. To remove the user from a group, highlight that group in the right pane and click the **<<** button. When all the appropriate groups are listed in the right pane, click the **Save** button in the pop-up window, then the **Save** or **Save & Close** button on the Groups tab.

Accounts Tab

On the Accounts sub-tab, create one or more email accounts for this user. Note that each user will also be able to manage his email accounts within the Email module. Click the **Add** button to create a new account or click the **Account Title** to edit an existing account. To delete an account, mark the checkbox by the account and click the **Delete** button.

Manage Groups

Groups are used within DayPoint Enterprise to allow users to share information. Users can be in one or more groups. To manage Groups, click the **Groups** tab in the Admin module. To add a new Group, click the **Add** button. To edit an existing group, click the group's **Group Name** or **Description** link. To delete a group, mark the checkbox next to the group and click the **Delete** button.

There are two types of Group members, **Group Administrators** and **Users**. Group Administrators have slightly expanded capabilities within DayPoint, as described in the Calendar Sharing section above.

General Tab

The General tab is used to define the group parameters. Your entry in the **Group Name** field is used to identify the group throughout DayPoint, so make this entry meaningful to your users.

To add users and administrators to the group, click the appropriate **Add/Remove…** button. In the pop-up, add users by selecting the users in the left pane and clicking the **>>** button to move them to the right pane. Remove users by selecting the users in the right pane and clicking the **<<** button to move them to the left pane. When the right pane has all the users you want to be in the group, click the **Save** button.

Limit the disk space allocated to the group for uploaded files and total email storage in the **File Upload Limit** and **Group Email Limit** fields.

Select a color to associate with the group (used in the calendar displays) by clicking the **Select…** button next to **Calendar legend color**.

The **Privileges** checkboxes determine how individual users interact with the group calendar and the calendars of other users in the group.

- Marking the **Add** checkbox allows any member of the group to add an event to the group's calendar and upload new files to the Files module
- Marking the **Edit** checkbox allows any member of the group to edit or delete an event on the group's calendar and checkout and check in files in the Files module
- Marking the **Allow Public Calendar Submission** allows users who are not members of the group to add events to the group's calendar. A group administrator must approve these events. Notice of the new event will be emailed to the address entered in the **Email Public Submissions for Approval** field, if the associated checkbox is marked.

Any changes to an event on the group's calendar will be emailed to the address in the **Email Changes to Admin** field, if the associated checkbox is marked.

Marking the **Prevent Scheduling Conflicts** checkbox will prevent the creation of an event that conflicts with an existing event.

Mark the **Active** checkbox to enable the group. If this checkbox is not marked, the group will not appear anywhere within DayPoint.

Publish Tab

The Publish tab allows you to add a HTML header and footer to the group calendar that is presented to read-only users. Regular users can also access the read-only view by login in through …/publish/login.asp.

Calendar Groups

You can combine the calendars of multiple groups for display by creating Calendar Groups. These Calendar Groups appear on the Calendar selection drop down and provide a mechanism to have a Master Calendar for your organization.

Other Organization Administrative Items

The following items are not critical to your initial setup of DayPoint Enterprise. However, you may find them useful as you implement DayPoint Enterprise for your organization.

Announcements

Announcements appear at the top of every user's Home page in DayPoint Enterprise. Announcements are suitable for messages that should be seen by all of your organization's users.

To add a new Announcement, click on the Announcements tab in the Admin module. Then click the **Add** button and fill in the details of the announcement. The announcement will appear during the period indicated by the values in the **Start Date** and **End Date** fields.

Announcements can be targeted to specific Groups or all your DayPoint Enterprise Users, by making the appropriate selection in the **Group** dropdown on the Announcement edit form. Organization Administrators can create Announcements for any Group and the entire Organization. Group Administrators can create Announcements for their Groups.

Discussion Forums

Administrators must create the categories and forums for users to use the discussion forum capability of DayPoint Enterprise. Forum Categories are the top level of the forum hierarchy. A Category can have many Forums. Follow these steps to create Forums:

1. Click the **Add Category** button and enter a name for the category.
2. Click the **Add Forum** button
    - Enter a N**ame** for the Forum
    - Choose a **Category** for the Forum
    - Select which **Group** will be able to access the Forum, or allow all groups to access it by selecting All.
    - Enter a description of the Forum.
    - Select whether users can receive email notifications of new posts to the forum by marking **Allow Subscriptions**.
    - Mark the **Active** checkbox and click the **Save** button.

Resources

To track the usage of resources, such as Conference Rooms or Audio/Visual Equipment, list the Resources you wish to track on the Resources tab of the Admin module. Once a Resource is created, it will be available to assign to an event on the event's Resources sub-tab.

Custom Fields

You have the ability to create custom fields for Events, Users, Contacts and Companies. Each module can have up to five text fields and up to five dropdown fields. To create a custom field, click the **Add** button. In the popup window, select the module to which you want to add a custom field and the type of field to create and click the **Next** button.

Text Fields

To add a Text field, enter the label for the field for each of the languages supported by DayPoint. If you use only one language, or the same label applies to all languages, mark the **Same label for all languages** checkbox. Then click the **Save** button.

Dropdown Fields

To add a Dropdown field, enter the label for the field for each of the languages, just as for the Text field. Then, enter the first value to display in the dropdown list in the **Drop-down values** area and click the **Add** button. Repeat for each value you want to add to the dropdown list. To rearrange the order of the values, highlight a value and click the **Up** or **Down** button to change its location in the list.

Templates

You can customize the appearance of DayPoint Enterprise for your organization by specifying information to be displayed on each side of the main DayPoint Enterprise window. The information placed in these four regions (header, footer, left column and right column) will be displayed on every page. These areas can contain plain text or HTML. To create a new Template, click the **Add** button. To delete a Template, mark the checkbox next to the Template Name and click the **Delete** button.

To design the template, enter a name for the template in the **Template name** field. Then, in the **Menu Alignment** dropdown, select whether the main DayPoint menu will be the default vertical menu or a horizontal menu across the top of the DayPoint window. Then enter the size, in percent of screen or pixels, for each region in the **Height** and **Width** fields. Next, create the content for each region in the larger text area. The content can by either plain text or HTML. When complete, click the **Save** button to save your design.

You can create as many templates as you like, but only one template can be active at any time. To change the active template, click the **[Set active]** link for the template you want to activate. All users will see the template that you set as active.

Glossary

Group – Users grouped together based on their common information sharing needs. Each Group has shared privileges and capabilities.

Organization – The representation of your organization within DayPoint Enterprise. May also be referred to as "Virtual Organization."

Organization Administrator – The User(s) who manage the setup of the organization, including the creation of new user accounts.

Site – The entire DayPoint Enterprise installation, which could consist of multiple Organizations.

Site Administrator – The User(s) who manage the entire DayPoint Enterprise installation. This role will have control over the server on which DayPoint Enterprise is installed.

Virtual Organization – See Organization.

User – An individual within the organization. Users can be assigned to Groups.