Getting Started Guide

ER Management Suite
Version 3.0

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1. Introduction

The Getting Started Guide provides you with a step by step guide for the configuration of the application after installation. As well as provide a number of best practices, tips, and suggestions to ensure that product is configured effectively for your environment. This guide must be used in conjunction with the online help to obtain a completed understanding of the product. It is also strongly recommended that the read this whole guide first before attempting any of the tasks mentioned.

For further information or to get white papers about some of the topics discussed in this document, visit the East River Software Web site at http://www.eastriversoftware.com .

Note: All terminology, product references, and recommendations are subject to change without notice.

1.1. Document Conventions

When installing the ER Management Suite web application, the documentation uses the following conventions:

Convention	Meaning
Boldface Italics	Commands, names of interface items such as text boxes, buttons, and user input fields.
Italics	Placeholders for information or parameters that you provide. For example, filename in a procedure means you type the actual name of a file. Italics also are used for new terms and the titles of books.
%SystemRoot%	The Windows system directory, which can be WTSRV, WINNT, WINDOWS, or other name you specify when you install Windows.
`Monospace`	Text displayed in a text file.
{ braces }	A series of items, one of which is required in command statements. For example, { yes | no } means you must type yes or no. Do not type the braces themselves.
	This image represents an information tip that you may find useful.
	This image represents some important information that you must follow.

2. Logging on the First Time

2.1. Administrator Account

2.1.1. Database Authentication

If you have configured ER Management Suite to use database authentication then you will need to log in using the following credentials:

- ***User Name***: `ermsadmin`
- ***Password***: `erpassword`

Once you have logged into the application it is strongly recommended that you change this password immediately by performing the following steps.

- Navigate to the following page ***Home > Profile > Password***
- Enter the following information:
  - ***Old Password***: *the existing password*
  - ***New Password***: *your new password*
  - ***Confirm Password***: *your new password again*
- Click on the ***Apply*** button

2.1.2. Active Directory Authentication

If you have configured ER Management Suite to use Active Directory authentication then you will need to log in using the following credentials:

- ***User Name***: `ermsadmin`
- ***Password***: *the domain password to the account*

You must have a domain account called “ermsadmin” otherwise you will not be able to log on. This account does not require any domain administrative rights.

Once you have logged into the application can change the logon name for the administrator account by performing the following steps.

- Navigate to the following page ***Client > Contacts > View/Edit***
- Click the edit icon for the ***System Administrator*** account
- Click on the ***Logon*** tab
- Enter the following information:
  - ***User Name***: *enter the new user name*
- Click on the ***Apply*** button

3. Configuring the Application Suite

3.1. Where to Begin

Before entering any data you must configure the Application suite according to your requirements. This involves completing the following three core steps:

1. Application Settings
2. Departments and Contacts
3. Groups and Roles
4. Application Access

Once you have completed these three steps you are ready to configure each application. The configuration steps for each application are discussed in the relevant chapters.

3.2. Application Settings

By default the ER Management Suite is configured with a number of default settings. It is important that you check these settings to ensure that the selected options are best suited to your organization. This can be achieved by navigating to each of the following pages and confirming that the settings are best suited to your environment:

- Site > Administration > Options > Settings
- Client > Administration > Options > Settings
- ***Home > Administration > Options > Settings***
- Incident > Administration > Options > Settings
- Project > Administration > Options > Settings
- To-Do > Administration > Options > Settings
- Knowledge > Administration > Options > Settings
- Messaging > Administration > Options > Settings

Refer to the online help as to the meaning of each setting.

3.3. Departments and Contact

There are two ways to add departments and contacts into the ERMS:

1. Importing from Active Directory and
2. Manual

3.3.1. Importing from Active Directory

If have an Active Directory (AD) environment you can import users from AD into ERMS by navigating to:

- Client > Administration > Import/Export > Import Contacts From AD

In most cases the user name and password fields will not be required to retrieve a list of Active Directory users. Should your Active Directory environment not support guest emulation of user accounts, then you must supply these credentials.

The import process will import the following attributes from Active Directory. The values not in square brackets represent the values as seen in Active Directory Users and Computer, while the value inside the square brackets represents the LDAP attribute name.

AD Attribute	ERMS Attribute
Display Name [name]	Full Name
User Logon Name [sAMAccountName]	User Name
First Name [givenName]	First Name
Last Name [sn]	Last Name
Department [department]	Department
Telephone Number [telephoneNumber]	Work Phone
E-mail [Mail]	E-mail Address
Mobile [mobile]	Mobile Phone
Office [PhysicalDeliveryOffice]	Location

If you unable to connect to Active Directory ensure that your domain value is correct in the web.config file. See Active Directory Integration under Advanced Topics in the Installation Guide for more information about this value.

As well as import the above attributes into ERMS you must specify the language that will be assigned to the imported users. If you have configured ERMS for database authentication you must also specify an initial password that all imported users will inherit.

3.3.2. Manually Adding Departments & Contacts

If you do not have an Active Directory environment you can manually create your list of contacts. Start by creating all your departments first, then your contacts.

When creating a department you will notice that the ***Manager*** field only contains the option ***None***. This is because no contacts have been created and assigned to the ***Department Manager*** role. Once you have completed these two steps you can come back and assign a contact to the department as the manager.

Some e-mail rules allow you send an e-mail to the department and/or contact manager; this will only occur if the ***Manager*** field for the department/contact has been set to a contact that has a valid e-mail address.

3.4. Groups and Roles

Once you have added your list of departments and contacts into ERMS, you can then begin to assign users to groups and roles. This step only needs to be performed on those contacts that will log into ERMS. For the purpose of this document contacts that have the ability to log into ERMS are referred to as Users.

A Group contains both pages and users or just pages. Members of a group have access to all the pages that have also been assigned to that group.

A role is very similar to group except that you can only assign users to it. Being a member of a role does not give the user access to any pages, instead it provides the user with additional functions and/or features with in a page that they already have access to.

The ***No Access*** group takes precedents over all other groups. Any page assigned to this group will not be accessible by any user or administrator. The ***Everyone*** group means any authenticated user. The ***Guest*** group means any user regardless of authentication.

3.4.1. Default and Custom Groups

The Application Suite comes with a number of pre-defined groups that begin with “App-“. These groups are not system groups and as such you can edit or delete them as you see fit.

These groups represent different functions and roles with the application suite. By assigning users to these groups you will give them access to pages that will enable them to perform that function/role. The table below describes each of these:

Name	Comment
App-Client-Department Manager	Members of this group have access to pages that are typically used by departmental managers, including the department and contact overview pages. For completeness members of this group should also be a member of the ***Department Manager*** roles.
App-Client-Manager	Members of this group have access to pages that are typically used by those users who need to manage departments and contacts with in application suite. For completeness members of this group should also be a member of the ***Client Manager*** role.
App-Home-Calendar-Event-Editor	Members of this group have access to pages that allow you to manage calendar events with in application suite. Normally members of this group would also be a member of the App-Home-Calendar-Owner group.
App-Home-Calendar-Owner	Members of this group have access to pages

	that allow you to manage your or your buddies' calendar appointments.
App-Home-Timesheets-Owner	Members of this group have access to pages that allow you to manage your timesheets. If you want a user to be able to change the timesheet status for all users then add them to the ***Timesheet Manager*** role.
App-Incident-Manager	Members of this group have access to pages that are typically used by the incident managers, including a number of reports. For completeness members of this group should also be a member of the ***Incident Manager*** role.
App-Incident-Owner	Members of this group have access to pages that are typically used by the incident owners, including viewing and editing incident tickets that they are an owner of.
App-Incident-Resource	Members of this group have access to pages that are typically used by incident resources to allow them to enter their work notes and times for an incident ticket. For completeness members of this group should also be a member of the ***Incident Resource*** role.
App-KC-Article-Approver	Members of this group have access to pages that allow them to approve any knowledge article that has been created. Normally members of this group would also be a member of the App-KC-Article-Editor group, so that they can make editorial changes to those articles.
App-KC-Article-Editor	Members of this group have access to pages that allow them to create and edit knowledge articles.
App-KC-Article-Reader	Members of this group have access to pages that allow them to search and read knowledge articles that they have rights to.
App-KC-Document-Approver	Members of this group have access to pages that allow them to approve new documents for publishing. It is common for members of this group to also be a member of the App-KC-Document Folder-Manager group. You must also have access and approver rights for the document folder to be able to

	approve documents. This is part of the document folder properties.
App-KC-Document Folder-Creator	Members of this group have access to pages that allow them to create, edit and manage document folders.
App-KC-Document Folder-Manager	Members of this group have access to pages that allow them to manage document folders, including the ability to change access and approver rights.
App-KC-Document Folder-Member	Members of this group have access to pages that allow them to add, edit and download documents from document folders that they have access to.
App-MC-Message-Editor	Members of this group have access to pages that allow them to create, edit and delete messages sent and received from their buddies.
App-MC-Notice-Approver	Members of this group have access to pages that allow them to approve any notice that has been created. Normally members of this group would also be a member of the App-MC-Notice-Editor group, so that they can make editorial changes to those notices.
App-MC-Notice-Editor	Members of this group have access to pages that allow them to create and edit notices.
App-MC-Notice-Reader	Members of this group have access to pages that allow them to search and read notices that they have rights to.
App-Project-Manager	Members of this group have access to pages that are typically used by project managers, including a number of reports. For completeness members of this group should also be a member of the ***Project Manager*** role.
App-Project-Owner	Members of this group have access to pages that are typically used by the project owners to view the status of projects that they are an owner of.
App-Project-Resource	Members of this group have access to pages that are typically used by project resources to allow then to enter their work notes and times. For completeness members of this group should also be a member of the ***Project Resource*** role.
App-ToDo-List-Creator	Members of this group have access to pages that allow then to create, edit and delete task lists.

App-ToDo-List-Member	Members of this group have access to pages that are allow list members to enter their work notes and times against a tasks with in a list that they have access to.
App-ToDo-Task-Owner	Members of this group have access to pages that are typically used by the task owners to view the status of tasks that they are an owner of.

3.4.2. Assigning Pages to Groups

You can only assign pages to groups that are of the type ***Page Only*** or ***Both***. Such groups will have the assign page icon next to their name, click on this icon to assign pages to the group.

Any pages assigned to the ***Everyone*** group means that all authenticated users will have access to these pages. While pages assigned to the ***Guest*** group means any user regardless if they are authenticated or not, will have access to these pages.

3.4.3. Assigning Users to Groups

You can only assign contacts to groups that are of the type ***Contact Only*** or ***Both***. Such groups will have the assign contact icon next to their name, click on this icon to assign users to the group. By assigning a user to a group, they will then have access to any pages that has also been assigned to that group.

3.4.4. Assigning Users to Roles

Roles will only have the assign contact icon next to their name allowing you to only assign users to them. Roles can not have any pages assigned to them, rather roles provided the user with additional functions/features in existing pages that they already have access to.

3.4.5. Reloading the Cache and Rebuilding the Menu

After you have completed assigning the pages and/or contacts to the groups and roles you must refresh the cache to ensure that all changes can be seen. This can be done by going to the page:

- Site > Administration > Options > Reload Cache

Once you have reloaded the cache, it is also important to force the rebuilding of all menus. This can be done by going to the page:

- ***Site > Tab/Menu > Rebuild Menu***

3.5. Application Security

In the previous section we look at assigning pages to groups, in effect what we were doing was configuring page level security. In this section we look at application level security.

Application level security takes precedents over page level security. This means that if you do not have access to the application, then you also do not have any access to pages within that application.

3.5.1. Application Access Rights

To set the application access rights navigate to the following page

- Site > Applications > View/Edit

View/Edit page displays the access rights associated with each application. You should review these to ensure that they are correct for your environment. If you wish to make changes click on the edit icon for the application that you want to make the changes to.

We DO NOT recommended that you change the access rights associated with the Home and Log Off applications.

3.5.2. Reloading the Cache and Rebuilding the Menu

After you have completed changing the application access rights you must refresh the cache to ensure that all changes can be seen. This can be done by going to the page:

- Site > Administration > Options > Reload Cache

Once you have reloaded the cache, it is also important to force the rebuilding of all menus. This can be done by going to the page:

- ***Site > Tab/Menu > Rebuild Menu***

4. Home Application

4.1. Time Management

The Home application is responsible for providing the Time Management functionality that is used through out the suite of applications. In this section we look at how to configure the Time Management functionality.

4.1.1. Ticket and Task Integration

By default Incident Tickets, Project Tasks and To-Do Tasks have all been configured so that they appear in any of the Timesheets (including the Quick Entry, Simple and Advanced).

This is configured as follows:

- A Home status (see ***Home > Administration > Statuses > View/Edit***) has been created with the ***Track Time*** option enabled for each object (Incident Ticket, Project Task or To-Do Task).
- Through the ***Home > Administration > Options > Settings*** page this status is then assigned to the corresponding status.

The end effect of this configuration means that the name of the status will be prefixed to the title/subject. Under the default settings this will be:

- ***TK*** – for Incident Tickets
- ***PR*** – for Project Tasks
- ***TD*** – for To-Do Tasks

You change the name of the status or assigned a different status to each of these objects if you wish using the above two mentioned pages.

4.1.2. Incident, Project and To-Do Integration

In previous section we looked at how to get Incident Tickets, Project Tasks or To-Do Tasks to appear as a task in our timesheets. But what if we want to enter our times directly in each application and still see those times in our timesheets (i.e. Advanced).

For this to occur we need to ensure that the ***Timesheet Integration*** option has been enabled for each application. This can be done by navigating to the following pages:

- Incident > Administration > Options > Settings
- Project > Administration > Options > Settings
- To-Do > Administration > Options > Settings

When set to ***Yes***, times entered through the ***Notes*** page will also appear in the timesheets.

4.2. Statuses

Home statues appear in the list of tasks for timesheets, but also represent your status in the buddy status web part. In other words when switching your timesheet status, you are also updating your status in the buddy status web part.

4.2.1. Default and Custom Statues

You should review the existing statuses by navigating to the ***Home > Administration > Statuses > View/Edit*** page. If you want to change any of the properties click on the edit icon. The statues that are shipped as part of the product can not be deleted; however you can disable them by changing the access rights. Use the ***Home > Administration > Statuses > New*** page to add your own custom status. Refer to the online help for more information.

The status name is a translated string, therefore if the string does not exist you must create it by navigating to the ***Site > Languages >View/Edit*** page; then click on the add string icon. See Site Application later in this guide for more information as well as the online help.

4.2.2. Track Time Option

If a home status has the ***Track Time*** option enabled, then you can add work notes and times against that status. This type of status has a dual purpose:

1. Track your time and work notes
2. Change your status in the buddy status web part

If the ***Track Time*** option is not enabled, then you can not track any time for that status and the status has the only purpose of changing your status in the buddy status web part.

4.3. Buddy Management

Buddy Management allows users to share information that they own with their buddies, this includes:

- Messaging
- Buddy Status
- Calendar
- Ticket

User can share their information through the following two pages:

- ***Home > Buddies > Who Are My Buddies?*** – Determines what level of access you wish to give another user.
- ***Home > Buddies > Which Buddies Can I See?*** – Determines which buddies (who have given you access) you actually wish to see.

As can be seen above to see another users Tickets (for example) is a two step process:

1. They must give you rights to view their tickets through the page ***Home > Buddies > Who Are My Buddies?***
2. Once they have given you rights, you must select there name through the page ***Home > Buddies > Which Buddies Can I See?*** Otherwise you will not see any of there tickets.

The page ***Home > Buddies > Buddy Management*** is only intended for administrators and Client Managers as this allows you to change any users buddy preferences.

5. Incident Management

5.1. Statuses

Statues allow you to set the current point that the incident ticket is at.

5.1.1. Default and Custom Statues

You should review the existing statuses by navigating to the ***Incident > Administration > Statuses > View/Edit*** page. If you want to change any of the properties click on the edit icon. The statues that are shipped as part of the product can not be deleted; however you can disable them by changing the access rights. Use the ***Incident > Administration > Statuses > New*** page to add your own custom status. Refer to the online help for more information.

The status name is a translated string, therefore if the string does not exist you must create it by navigating to the ***Site > Languages >View/Edit*** page; then click on the add string icon. See Site Application later in this guide for more information as well as the online help.

5.1.2. Closed Status

Once you have defined all your statues you must assign a status as the one that will represent closed tickets. This can be done through the ***Incident > Administration > Options > Settings*** page. See the online help for more information.

It is not recommended that you change this option once incident tickets have been created. By changing this value tickets that were previously closed will become open again.

5.2. Priorities

Priorities allow you to set a level of importance for the incident ticket.

5.2.1. Default and Custom Priorities

You should review the existing priorities by navigating to the ***Incident > Administration > Priorities > View/Edit*** page. If you want to change any of the properties click on the edit icon. The priorities that are shipped as part of the product can not be deleted; however you can disable them by changing the access rights. Use the ***Incident > Administration > Priorities > New*** page to add your own custom priority. Refer to the online help for more information

The priority name is a translated string, therefore if the string does not exist you must create it by navigating to the ***Site > Languages >View/Edit*** page; then click on the add string icon. See Site Application later in this guide for more information as well as the online help.

5.3. Categories and Sub-Categories

Categories and sub-categories allow you to classify your incident tickets.

5.3.1. Default and Custom Categories

You should review the existing categories by navigating to the ***Incident > Administration > Categories > View/Edit*** page. If you want to change any of the properties click on the edit icon. Use the ***Incident > Administration >***

Categories > New page to add your own custom category. Refer to the online help for more information.

5.3.2. Sub-Categories

Once you have created all your categories you can create one or more sub-categories by navigating to ***Incident > Administration > Sub-Categories > New*** page.

The category and sub-category name is a translated string, therefore if the string does not exist you must create it by navigating to the ***Site > Languages >View/Edit*** page; then click on the add string icon. See Site Application later in this guide for more information as well as the online help.

5.4. Templates

Templates allow you to create a new incident ticket with pre-populated information in one or more fields. This can save your incident resource a significant amount of time when creating tickets for issues that are common and quickly resolved.

5.4.1. Default and Custom Templates

You should review the existing templates by navigating to the ***Incident > Administration > Templates > View/Edit*** page. If you want to change any of the properties click on the edit icon. Use the ***Incident > Administration > Templates > New*** page to add your own custom template. Refer to the online help for more information.

5.4.2. Standard Template

A new ticket is always based on the standard template when no other template is selected. This includes when creating a new ticket by navigating to the page ***Incident > Tickets > New***. The standard template can not be deleted.

5.5. Routes

Routes are automatic rules that you can create. These rules will assign a ticket to the most appropriate resource based on the category and priority that has been assigned to the ticket.

5.5.1. Default and Custom Routing Rules

You should review the existing routing rules by navigating to the ***Incident > Administration > Routes > View/Edit*** page. The default routing rule should be changed so that tickets are assigned to the correct resource. You can do this by clicking on the edit icon. This rule can not be deleted and can only be disabled if there is as least one other rule that is enabled. One routing rule must be enabled at all times.

Use the ***Incident > Administration > Routes > New*** page to add your own custom route. Refer to the online help for more information.

5.5.2. How It Works

When a ticket is submitted with the option ***Use Routing Rules*** it is then compared against the routing rules, the first rule that matches the criteria is then used to determine who the ticket should be assigned to.

Routing rules are process in order from lowest to highest. In other words a rule with an order of 1 will be process before a rule with an order of 99.

It is important to have a catch all routing rule (any category and any priority) otherwise tickets may not be assigned to a valid resource.

5.6. E-mail Rules

E-mail rules allow you to automatically send an e-mail when an incident ticket is saved or updated. The e-mail is sent when the action and the contact making that action; matches one or more rules.

5.6.1. Default and Custom E-mail Rules

You should review the existing e-mail rules by navigating to the ***Incident > Administration > E-mail > View/Edit*** page. The default e-mail rules should not be deleted, however you can enabled and disable them as you see fit. Do this by clicking on the edit icon. Use the ***Incident > Administration > E-mail > New*** page to add your own custom rule. Refer to the online help for more information.

It is important that you have configured the e-mail server name and enabled e-mail function for the whole site. Navigate to the page ***Site > Administration > Options > Settings*** and verify that these settings are correct. Use the page ***Site > Administration > Options > Test E-mail*** page to test the settings. Refer to the online help for more information.

The name of an e-mail rule is a translated string, therefore if the string does not exist you must create it by navigating to the ***Site > Languages >View/Edit*** page; then click on the add string icon. See Site Application later in this guide for more information as well as the online help.

Give careful consideration to the rules that you create. Test and validate your rules as the application does not prevent a recipient from receiving multiple e-mails because they have matched multiple rules. You may want to consider creating separate e-mail rules for each class of recipient.

5.6.2. How It Works

After a ticket has been saved or updated it is then compared against the e-mail rules that are enabled. Rules that match the criteria are then sent to the selected recipients. If the ***Review*** option is set to ***Yes*** then the user will have the ability to review and edit the e-mail prior to it being sent.

E-mail rules are process in order from lowest to highest. In other words a rule with an order of 1 will be process before a rule with an order of 99. Remember, all enabled e-mail rules are processed.

6. Project Management

6.1. Statuses

Statues allow setting the current point that the project or project task is at.

6.1.1. Default and Custom Statues

You should review the existing statuses by navigating to the ***Project > Administration > Statuses > View/Edit*** page. If you want to change any of the properties click on the edit icon. The statues that are shipped as part of the product can not be deleted; however you can disable them by changing the access rights. Use the ***Project > Administration > Statuses > New*** page to add your own custom status. Refer to the online help for more information.

The status name is a translated string, therefore if the string does not exist you must create it by navigating to the ***Site > Languages >View/Edit*** page; then click on the add string icon. See Site Application later in this guide for more information as well as the online help.

6.1.2. Closed and Completed Status

Once you have defined all your statues you must assign a status as the one that will represent closed projects and completed tasks. This can be done through the ***Project > Administration > Options > Settings*** page. See the online help for more information.

It is not recommended that you change these options once projects and tasks have been created. Changing this value after data has been entered, will force those project or project tasks to become open again.

6.2. Priorities

Priorities allow you to set a level of importance for the project.

6.2.1. Default and Custom Priorities

You should review the existing priorities by navigating to the ***Project > Administration > Priorities > View/Edit*** page. If you want to change any of the properties click on the edit icon. Use the ***Project > Administration > Priorities > New*** page to add your own custom priority. Refer to the online help for more information

The priority name is a translated string, therefore if the string does not exist you must create it by navigating to the ***Site > Languages >View/Edit*** page; then click on the add string icon. See Site Application later in this guide for more information as well as the online help.

6.3. Categories

Categories allow you to classify your projects.

6.3.1. Default and Custom Categories

You should review the existing categories by navigating to the ***Project > Administration > Categories > View/Edit*** page. If you want to change any of the properties click on the edit icon. Use the ***Project > Administration >***

Categories > New page to add your own custom category. Refer to the online help for more information.

The category name is a translated string, therefore if the string does not exist you must create it by navigating to the ***Site > Languages >View/Edit*** page; then click on the add string icon. See Site Application later in this guide for more information as well as the online help.

6.4. Cost Types

Cost Types allow you to define different cost categories that can be assigned to your projects.

6.4.1. Default and Custom Cost Types

You should review the existing cost types by navigating to the ***Project > Administration > Cost Type > View/Edit*** page. If you want to change any of the properties click on the edit icon. The cost types that are shipped as part of the product can not be deleted; however you can disable them by changing the access rights. Use the ***Project > Administration > Cost Type > New*** page to add your own custom cost type. Refer to the online help for more information.

The cost type name is a translated string, therefore if the string does not exist you must create it by navigating to the ***Site > Languages >View/Edit*** page; then click on the add string icon. See Site Application later in this guide for more information as well as the online help.

6.5. E-mail Rules

E-mail rules allow you to automatically send an e-mail when a project or project task is saved or updated. The e-mail is sent when the action and the contact making that action; matches one or more rules.

6.5.1. Default and Custom E-mail Rules

You should review the existing e-mail rules by navigating to the ***Project > Administration > E-mail > View/Edit*** page. The default e-mail rules should not be deleted, however you can enabled and disable them as you see fit. Do this by clicking on the edit icon. Use the ***Project > Administration > E-mail > New*** page to add your own custom rule. Refer to the online help for more information.

It is important that you have configured the e-mail server name and enabled e-mail function for the whole site. Navigate to the page ***Site > Administration > Options > Settings*** and verify that these settings are correct. Use the page ***Site > Administration > Options > Test E-mail*** page to test the settings. Refer to the online help for more information.

The name of an e-mail rule is a translated string, therefore if the string does not exist you must create it by navigating to the ***Site > Languages >View/Edit*** page; then click on the add string icon. See Site Application later in this guide for more information as well as the online help.

Give careful consideration to the rules that you create. Test and validate your rules as the application does not prevent a recipient from receiving multiple e-mails because they have matched multiple rules. You may want to consider creating separate e-mail rules for each class of recipient.

6.5.2. How It Works

After the project or project task has been saved or updated it is then compared against the e-mail rules that are enabled. Rules that match the criteria are then sent to the selected recipients. If the ***Review*** option is set to ***Yes*** then the user will have the ability to review and edit the e-mail prior to it being sent.

E-mail rules are process in order from lowest to highest. In other words a rule with an order of 1 will be process before a rule with an order of 99. Remember, all enabled e-mail rules are processed.

7. To-Do Application

7.1. Statuses

Statues allow setting the current point that the task is at.

7.1.1. Default and Custom Statues

You should review the existing statuses by navigating to the ***To-Do > Administration > Statuses > View/Edit*** page. If you want to change any of the properties click on the edit icon. The statues that are shipped as part of the product can not be deleted; however you can disable them by changing the access rights. Use the ***To-Do > Administration > Statuses > New*** page to add your own custom status. Refer to the online help for more information.

The status name is a translated string, therefore if the string does not exist you must create it by navigating to the ***Site > Languages >View/Edit*** page; then click on the add string icon. See Site Application later in this guide for more information as well as the online help.

7.1.2. Completed Status

Once you have defined all your statues you must assign a status as the one that will represent completed tasks. This can be done through the ***To-Do > Administration > Options > Settings*** page. See the online help for more information.

It is not recommended that you change this option once tasks have been created. By changing this value tasks that were previously completed will become open again.

7.2. Priorities

Priorities allow you to set a level of importance for the task.

7.2.1. Default and Custom Priorities

You should review the existing priorities by navigating to the ***To-Do > Administration > Priorities > View/Edit*** page. If you want to change any of the properties click on the edit icon. Use the ***To-Do > Administration > Priorities > New*** page to add your own custom priority. Refer to the online help for more information

The priority name is a translated string, therefore if the string does not exist you must create it by navigating to the ***Site > Languages >View/Edit*** page; then click on the add string icon. See Site Application later in this guide for more information as well as the online help.

7.3. E-mail Rules

E-mail rules allow you to automatically send an e-mail when a task is saved or updated. The e-mail is sent when the action and the contact making that action; matches one or more rules.

7.3.1. Default and Custom E-mail Rules

You should review the existing e-mail rules by navigating to the ***To-Do > Administration > E-mail > View/Edit*** page. The default e-mail rules should not be deleted, however you can enabled and disable them as you see fit. Do this by clicking on the edit icon. Use the ***To-Do > Administration > E-mail > New*** page to add your own custom rule. Refer to the online help for more information.

It is important that you have configured the e-mail server name and enabled e-mail function for the whole site. Navigate to the page ***Site > Administration > Options > Settings*** and verify that these settings are correct. Use the page ***Site > Administration > Options > Test E-mail*** page to test the settings. Refer to the online help for more information.

The name of an e-mail rule is a translated string, therefore if the string does not exist you must create it by navigating to the ***Site > Languages >View/Edit*** page; then click on the add string icon. See Site Application later in this guide for more information as well as the online help.

Give careful consideration to the rules that you create. Test and validate your rules as the application does not prevent a recipient from receiving multiple e-mails because they have matched multiple rules. You may want to consider creating separate e-mail rules for each class of recipient.

7.3.2. How It Works

After the task has been saved or updated it is then compared against the e-mail rules that are enabled. Rules that match the criteria are then sent to the selected recipients. If the ***Review*** option is set to ***Yes*** then the user will have the ability to review and edit the e-mail prior to it being sent.

E-mail rules are process in order from lowest to highest. In other words a rule with an order of 1 will be process before a rule with an order of 99. Remember, all enabled e-mail rules are processed.

8. Site Application

8.1. Defining a Custom Language

8.1.1. Adding a Custom Language

ER Management Suite has been developed to support multiple languages, however at this stage only English – US is shipped with the product. You can add define you own language by using the process.

1. **Create the Language –** Navigate to the page ***Site > Languages > New*** and add your new language. Refer to the online help for information about the different fields
2. **Export the English – US language –** Navigate to the page ***Site > Administration > Import/Export > Export Language*** and export the English – US language. Download this file to your local machine.
3. **Edit the Language File –** Use notepad (or any text editor) to modify the downloaded language file. See Language File Format below for more information.
4. **Import Your String –** Navigate to the page ***Site > Administration > Import/Export > Import Language*** and import the file that you have just modified. Ensure that you have selected your new language.

8.1.2. Language File Format

The language file that you have downloaded is made up of the following parts

- Cache – determines if the string should be cached
- Value – This is the internal name of the string. Do not change this value
- Text – The translated value of the string. You should modify this string part to your chosen language.

Each of these parts is separated by the **=** sign. Do not use the **=** sign for any part of the value or text.

8.2. Defining a Custom String

Certain fields through out the suite use translated values, this will often mean that you must add a string to all enabled languages, otherwise the value will be display untranslated, with the @ symbol pre and post fixed to the word.

8.2.1. Adding a Custom String

To add a custom string navigate to the ***Site > Languages > View/Edit*** page and click on the add string icon.

- Value – This is the name of the value that you previously entered.
- Cache – Check this option if you want the string to be cache.
- Text – The translated value of the string.

Click the OK button to save you new string.

9. Client Management

9.1. E-mail Rules

E-mail rules allow you to automatically send an e-mail when a Note is saved or updated for a contact or department. The e-mail is sent when the action and the contact making that action; matches one or more rules.

9.1.1. Default and Custom E-mail Rules

You should review the existing e-mail rules by navigating to the ***Client > Administration > E-mail > View/Edit*** page. The default e-mail rules should not be deleted, however you can enabled and disable them as you see fit. Do this by clicking on the edit icon. Use the ***Client > Administration > E-mail > New*** page to add your own custom rule. Refer to the online help for more information.

It is important that you have configured the e-mail server name and enabled e-mail function for the whole site. Navigate to the page ***Site > Administration > Options > Settings*** and verify that these settings are correct. Use the page ***Site > Administration > Options > Test E-mail*** page to test the settings. Refer to the online help for more information.

The name of an e-mail rule is a translated string, therefore if the string does not exist you must create it by navigating to the ***Site > Languages >View/Edit*** page; then click on the add string icon. See Site Application later in this guide for more information as well as the online help.

Give careful consideration to the rules that you create. Test and validate your rules as the application does not prevent a recipient from receiving multiple e-mails because they have matched multiple rules. You may want to consider creating separate e-mail rules for each class of recipient.

9.1.2. How It Works

After the note has been saved or updated it is then compared against the e-mail rules that are enabled. Rules that match the criteria are then sent to the selected recipients. If the ***Review*** option is set to ***Yes*** then the user will have the ability to review and edit the e-mail prior to it being sent.

E-mail rules are process in order from lowest to highest. In other words a rule with an order of 1 will be process before a rule with an order of 99. Remember, all enabled e-mail rules are processed.

10. Knowledge Center

10.1. Document Folders

Document folders allow you to upload and save documents with the suite of applications. The Knowledge Center is responsible for providing all other applications with the ability to upload and save documents. This includes the Incident, Project and Client applications.

10.1.1. How It Works

Documents folder are simply a file path either on the web server itself or on a network share. When a user uploads a file the file is saved to that file path.

File Permissions

Because the file system is used to save files (rather than the database) it is important that the web server has permissions to that location. Specifically it is the account that is used by the application pool that will require rights.
If your application pool is configured to use a Windows account then the file permissions (and share permissions) must be granted to that account. If your application pool is using the Windows Network account, then you can assign the server account to the file and share permissions.

Incorrect permissions are a common cause as to why documents can not be uploaded.

10.1.2. Integration Support

All document folders that are created can be viewed through the ***Knowledge > Documents > View/Edit*** page provided that you have rights to that document folder. Document folders are automatically created for each integrated application (Incident, Projects and Client) when the ***Documents*** tab is clicked on for the first time. Incident and Project document folders are created as hidden folders by default (this can not be changed) and do not appear in the list unless you click on the ***Show Hidden*** option.

10.1.3. Folder Locations

By default the ***Document Folder*** setting for each application will determine where the folder is created. Incident and Project document folders are named according to the ticket and project identifiers (ids). The Client application has the ***Document Default Name*** setting that allows you to determine if the full name (of the contact or department) is used instead of the identifier.

10.1.4. Security

Access to the document folder is maintained by the application users will only see document folders that they have rights to. Security is based on the whole document folder and as such there is no support for security on individual documents.

The Document Folder path should never be set to a location that can be navigated to via a URL.

10.1.5. Approver

As part of the Document Folder properties you can set a user or a group of users as an approver. The approver must then approve a new document before it is published (visible) to everyone else. However, if you do not want a formal approval process, then select the ***Everyone*** group. By selecting the ***Everyone*** group uploaded documents become self approving.

10.2. E-mail Rules

E-mail rules allow you to automatically send an e-mail when an article is saved or updated. The e-mail is sent when the action and the contact making that action; matches one or more rules.

10.2.1. Default and Custom E-mail Rules

You should review the existing e-mail rules by navigating to the ***Knowledge > Administration > E-mail > View/Edit*** page. The default e-mail rules should not be deleted, however you can enabled and disable them as you see fit. Do this by clicking on the edit icon. Use the ***Knowledge > Administration > E-mail > New*** page to add your own custom rule. Refer to the online help for more information.

It is important that you have configured the e-mail server name and enabled e-mail function for the whole site. Navigate to the page ***Site > Administration > Options > Settings*** and verify that these settings are correct. Use the page ***Site > Administration > Options > Test E-mail*** page to test the settings. Refer to the online help for more information.

The name of an e-mail rule is a translated string, therefore if the string does not exist you must create it by navigating to the ***Site > Languages >View/Edit*** page; then click on the add string icon. See Site Application later in this guide for more information as well as the online help.

Give careful consideration to the rules that you create. Test and validate your rules as the application does not prevent a recipient from receiving multiple e-mails because they have matched multiple rules. You may want to consider creating separate e-mail rules for each class of recipient.

10.2.2. How It Works

After the article has been saved or updated it is then compared against the e-mail rules that are enabled. Rules that match the criteria are then sent to the selected recipients. If the ***Review*** option is set to ***Yes*** then the user will have the ability to review and edit the e-mail prior to it being sent.

E-mail rules are process in order from lowest to highest. In other words a rule with an order of 1 will be process before a rule with an order of 99. Remember, all enabled e-mail rules are processed.

11. Messaging Application

11.1. Notices

Notices allow you to publish a message that can viewed by users.

11.1.1. External Notices

For a notice to appear on the log on page, the ***Access Rights*** must set to ***guest***. This is because contacts that visit the log on page are not authenticated, until they type in their credentials and click on the ***Submit*** button.

11.1.2. Internal Notices

Notices that have not been set to guest will appear only to authenticated users on the ***Home > Dashboard*** page, provided that the user has rights to the notice.

11.1.3. Sticky Option

A user can get rid of a notice by clicking on the acknowledge ✔ icon, however if the sticky option is set to ***Yes*** then the notice will not disappear even if the user click on the acknowledge icon.

11.2. Messages

Messages are a simple way of sending a short message to buddy. These messages appear on the left hand side above the menu.

11.2.1. Before You Send a Message

To be able to send a buddy a message you ensure that the following two tasks have been completed:

5. Your buddy must give you rights to allow you to send them a message, this is done through the page ***Home > Buddies > Who Are My Buddies?***
6. Once they have given you rights, you must select their name through the ***Home > Buddies > Which Buddies Can I See?*** Page. Otherwise you will not see their name in your list.

This function is only intended for short messages as large messages may distort the display of the web page.

11.3. E-mail Rules

E-mail rules allow you to automatically send an e-mail when a notice is saved or updated. The e-mail is sent when the action and the contact making that action; matches one or more rules.

11.3.1. Default and Custom E-mail Rules

You should review the existing e-mail rules by navigating to the ***Messaging > Administration > E-mail > View/Edit*** page. The default e-mail rules should not be deleted, however you can enabled and disable them as you see fit. Do this by clicking on the edit icon. Use the ***Messaging > Administration > E-mail > New*** page to add your own custom rule. Refer to the online help for more information.

It is important that you have configured the e-mail server name and enabled e-mail function for the whole site. Navigate to the page ***Site > Administration > Options > Settings*** and verify that these settings are correct. Use the page ***Site > Administration > Options > Test E-mail*** page to test the settings. Refer to the online help for more information.

The name of an e-mail rule is a translated string, therefore if the string does not exist you must create it by navigating to the ***Site > Languages >View/Edit*** page; then click on the add string icon. See Site Application later in this guide for more information as well as the online help.

Give careful consideration to the rules that you create. Test and validate your rules as the application does not prevent a recipient from receiving multiple e-mails because they have matched multiple rules. You may want to consider creating separate e-mail rules for each class of recipient.

11.3.2. How It Works

After the notice has been saved or updated it is then compared against the e-mail rules that are enabled. Rules that match the criteria are then sent to the selected recipients. If the ***Review*** option is set to ***Yes*** then the user will have the ability to review and edit the e-mail prior to it being sent.

E-mail rules are process in order from lowest to highest. In other words a rule with an order of 1 will be process before a rule with an order of 99. Remember, all enabled e-mail rules are processed.