

Quick Setup for Administrators

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Extranet

Extranet (Customer Portal) allows members to share/communicate OfficeClip items with those outside the organization (e.g. customers, partners, or service providers). Therefore items, such as contact information, documents, calendars and various other features, can be shared (public web access or password protected) to efficiently communicate beyond OfficeClip members.

1. a – General Setup for Extranet

The Extranet setup can begin with display features that can be used to customize the way the portal is viewed by its visitors.

1. Select the Desktop applications in the main OfficeClip toolbar (bottom left).
2. Select Extranet from the left side menu.
3. Select Admin from the Extranet toolbar.
4. Edit the General Settings.
5. Click on the Save button (below form).

*A preview of the Extranet can be seen by clicking on the link at the top of the page.

1. b – Create a New Item

Items are elements in OfficeClip that can be shared through the Extranet. They include:

- Calendar
- Documents
- Knowledge Base
- Issue Tracker
- Timesheet / Expense Reports

1. Select the Desktop applications in the main OfficeClip toolbar (bottom left).
2. Select Extranet from the left side menu.
3. Select New Share from the Extranet toolbar.
4. Select the kind of share that you want to make.
5. Type Share Name.
6. Click Next
7. Select the associated Features.
8. Click Next.
9. Select Access mode: Public or Secured (password protected).
*for Secured, there is the option to select All Secured Users or from existing Extranet Users. (see Adding New User below)
10. Click on the Save button.

*A preview of the Extranet can be seen returning to the Admin screen.

1. c – Create a New User

Extranet Users are those contacts which are able to view Secured Extranet Items. They are defined by a First, Last Name and email address. Once a User is added, he/she will be visible from the User List.

1. Select the Desktop applications in the main OfficeClip toolbar (bottom left).
2. Select Extranet from the left side menu.
3. Select New User from the Extranet toolbar.
4. Enter required (*) fields.
5. Click Save.

*A preview of the Extranet can be seen returning to the Admin screen.

