XELOS 8 – First Steps

XELOS is a professional Enterprise 2.0 software that is used by companies mainly as an intranet solution to improve collaboration within teams and in the company.

The brilliant user-friendliness combined with a clear structure and easy to use features make XELOS the ideal solution for your projects. Additionally, XELOS can be 100% customized to best fit your needs.

The following pages will give you a quick overview over your new XELOS intranet and help you with the first steps.

The most important first steps are:

1. Overview over the user interface

2. Editing the personal profile

3. Inviting new users

4. Creating a new project group

5. Cooperation inside a group

Overview over the user interface

1. Main navigation

2. Sub-navigation

3. Current page

4. Administration-Bar

5. User info, settings and systemwide search

6. XELOS messenger
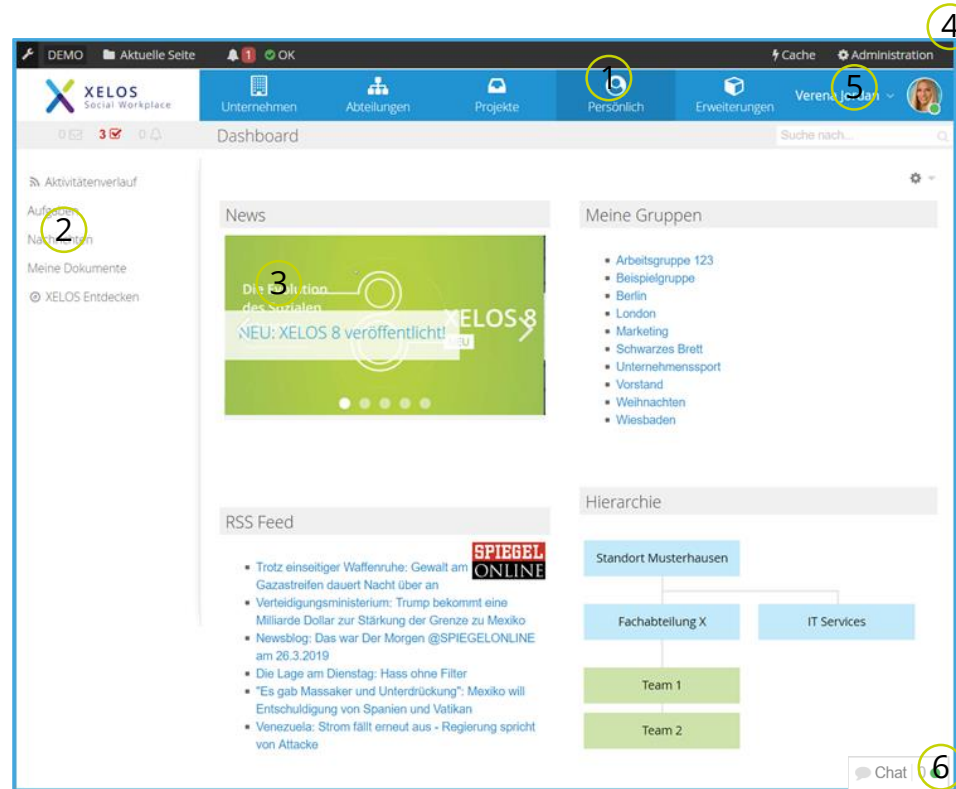
The user interface in XELOS is clearly structured and easy to understand:

The user choses a page in the main navigation he wants to open, and which will be displayed in the central area of the window. In the sub-navigation on the left side the user can find additional options and destinations depending on where he is in the system.

Editing the personal profile

1. Your personal profile

2. Dropdown to the personal settings
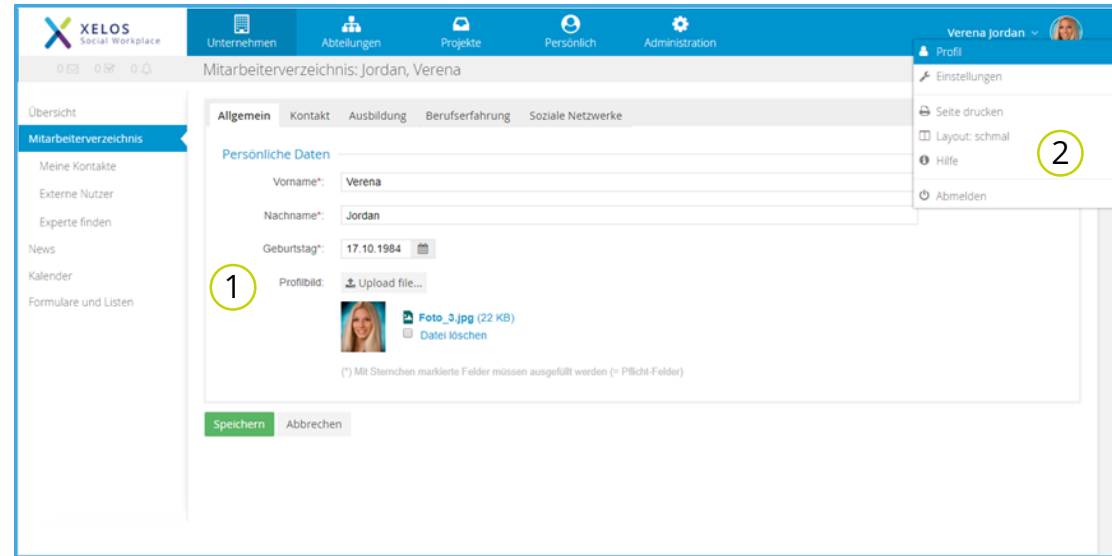
As a new user to the intranet you should first of all edit and complete your personal profile.

Click on your name in the top navigation to open your personal profile and settings. Here you can edit your name, user picture, contact information as well as details about your education and professional experience.

XELOS Social Workplace

1   Personal settings

2   Dropdown to the
      personal settings
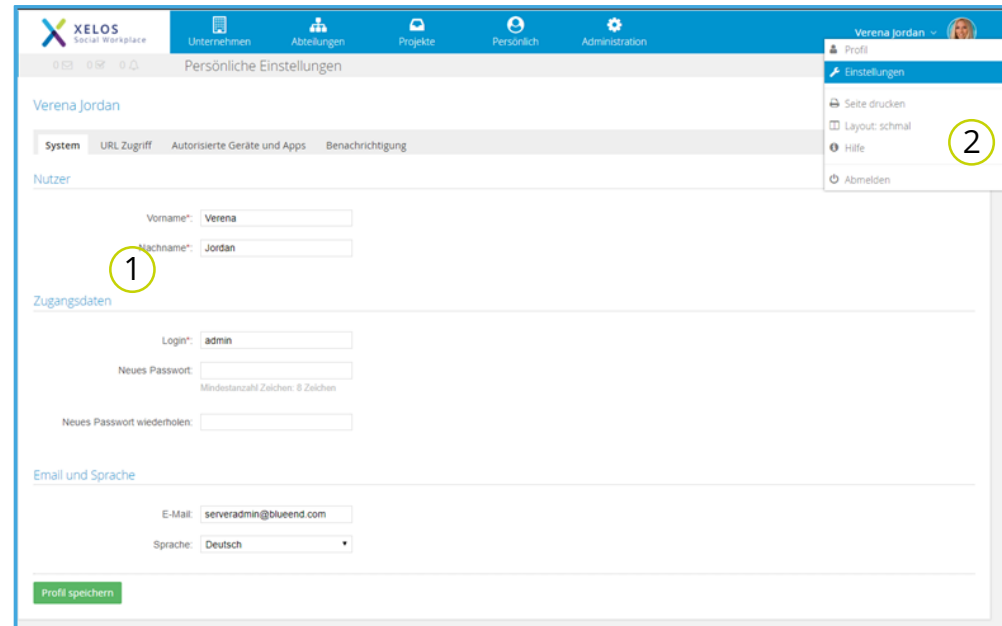
On the personal settings page your can customize your login information, email address and user language. In the notifications tab you can choose how the system should inform you about new developments. E.g. you can choose to only receive one daily digest as email, showing a summary of all the recent changes and new posts.

Inviting new users

① User administration

② Dropdown to system administration
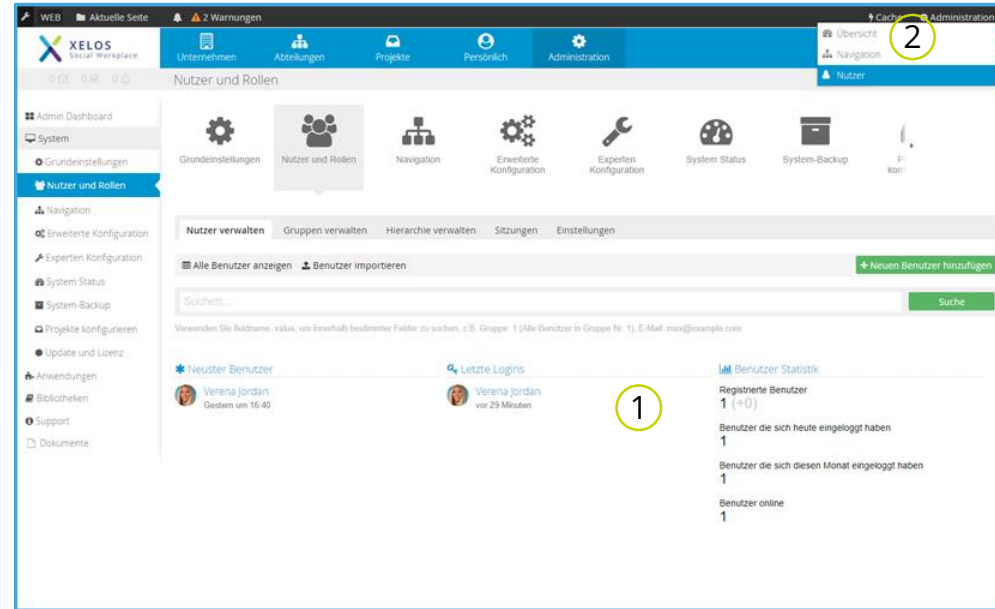
You can invite new users to the system from within the user administration:

In the administration bar click on "System Administration" and then choose "Users". The user administration shows you information on all users of your intranet as well as options to invite new users.

1 Inviting new users

2 Choose a security group for the new user
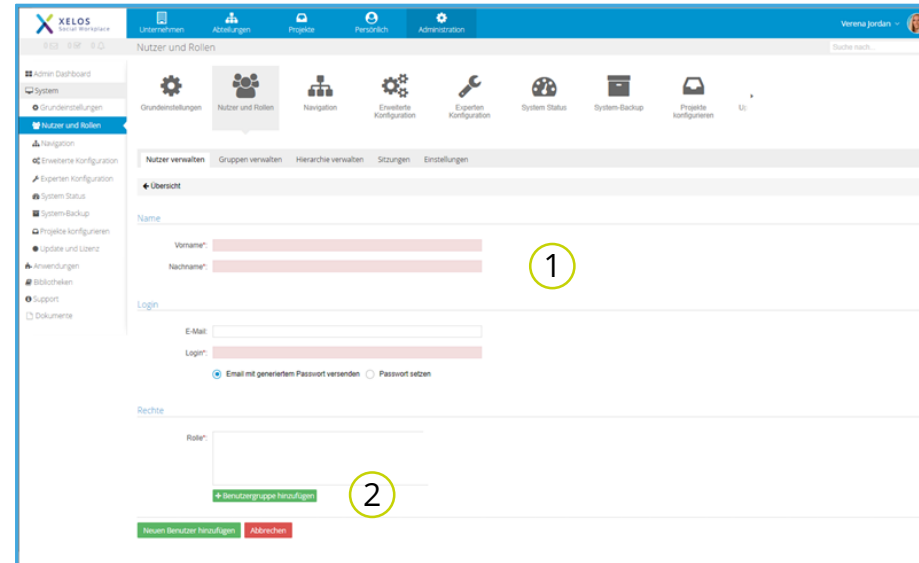
Input the name, email address as well as login data for the new user. The system can send him/her an invitation email with a random password. Alternatively, you can set a password manually and send him/her an invitation personally. **Important: Set the security group for the new user! This will ensure the user gets access rights to the correct contents.**
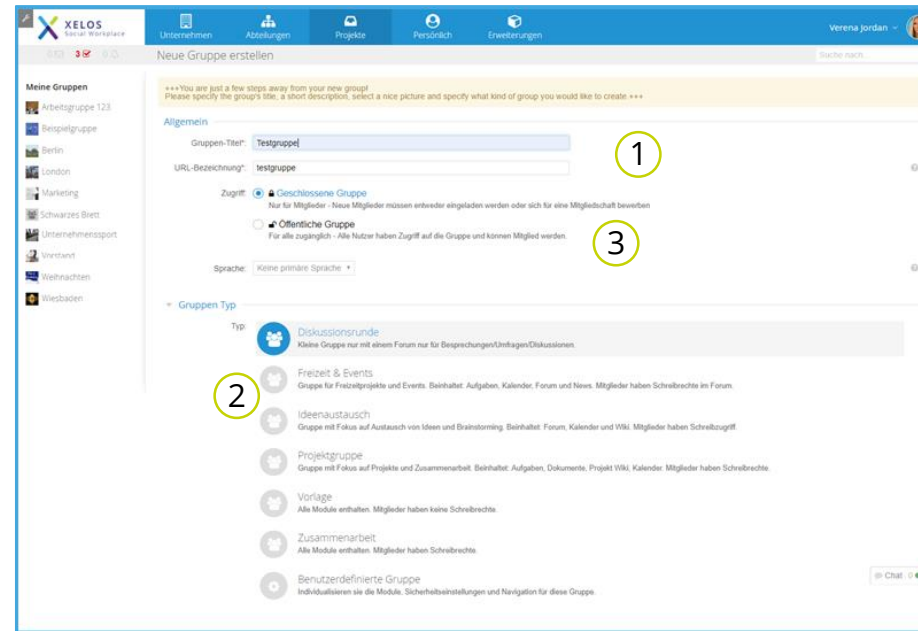
Creating a new project group

① Group index

② Button to create a new group
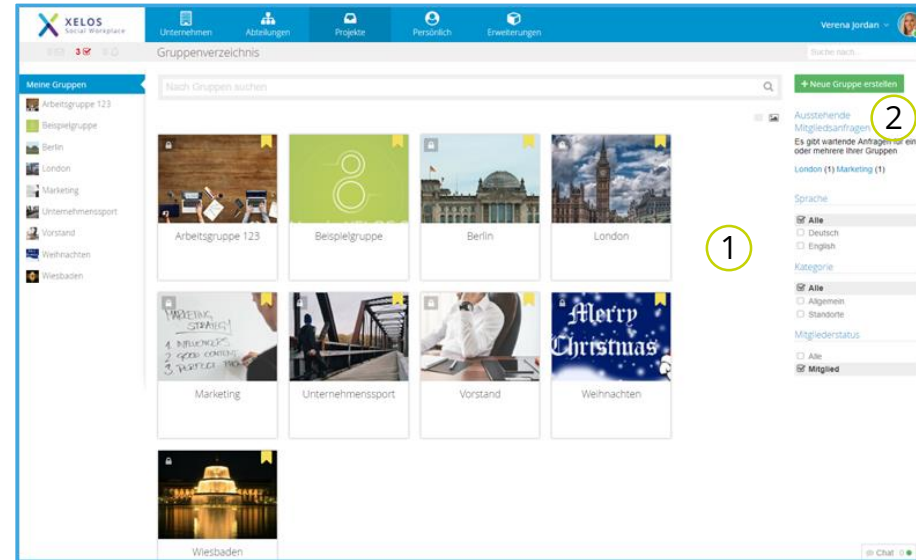
Creating new project groups in your new intranet is very easy. Simply navigate to the "Projects" page to see a listing of all available project groups. Here you can also create new project groups.

1 Name and description of your new project group

2 The group type defines the access rights and features available inside the group

3 Settings for the access to the group

To create a new project group, you only need to choose a name for the group and define the group and access types. The choice of group and access types define who will have access to the group and what features will be available to the different group members and how they will be able to collaborate. This choice can be adjusted afterwards as well.

1. Features available in the project group

2. Administration of the project group

3. Tabs of the group administration
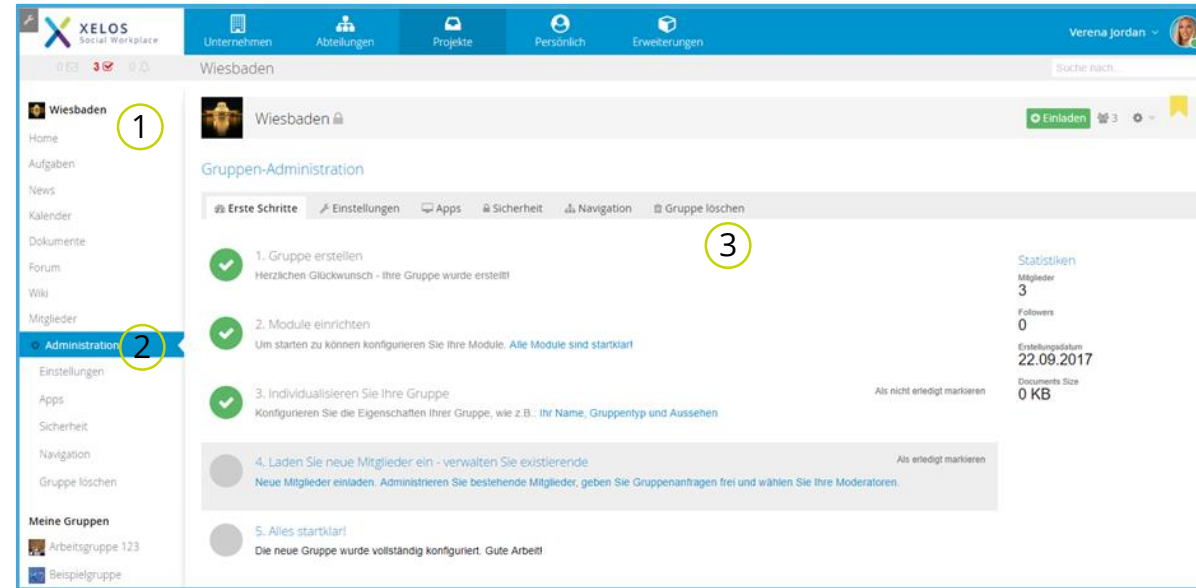
The system creates the new project group and will redirect you to the group administration of the newly created group. You will be shown the first steps of administrating the group, e.g. customizing the group's design and inviting new members.
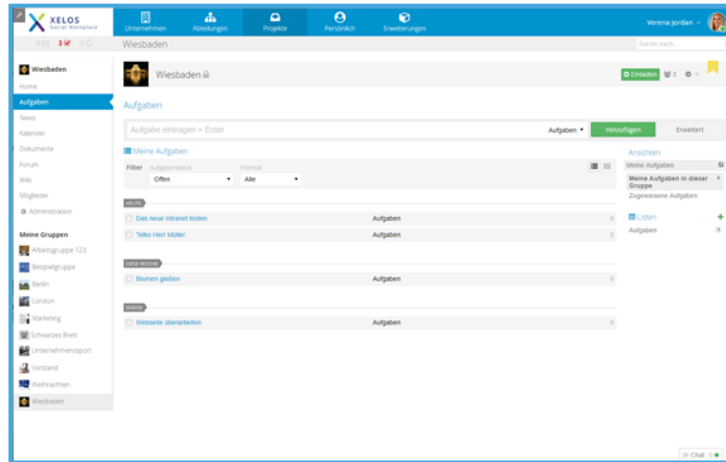
① Member administra-
tion of the group

② Overview over the
group members and
contacts.
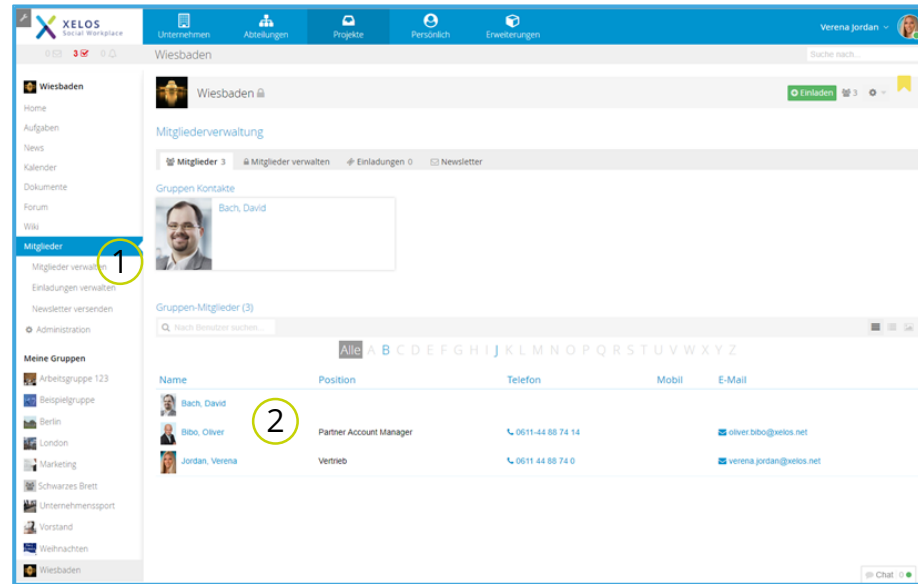
After creating the new project group, you need to invite the desired members. Click on
"Manage Invitations" to invite new members and choose the desired group role for them. You
can always adjust this under "Manage Members & Rights".

Cooperation inside a group

Stay on top of your tasks

- Create and edit tasks.

- Manage tasks and task lists.

- Tasks can be delegated, contain a deadline as well as additional information, links and attachments.

News – always up to date

- Post new news articles and comment existing ones.

- Create and manage news categories.

- Tags are supported in news articles.

- Edit new articles comfortably in a WYSIWYG editor.

## Work together on documents
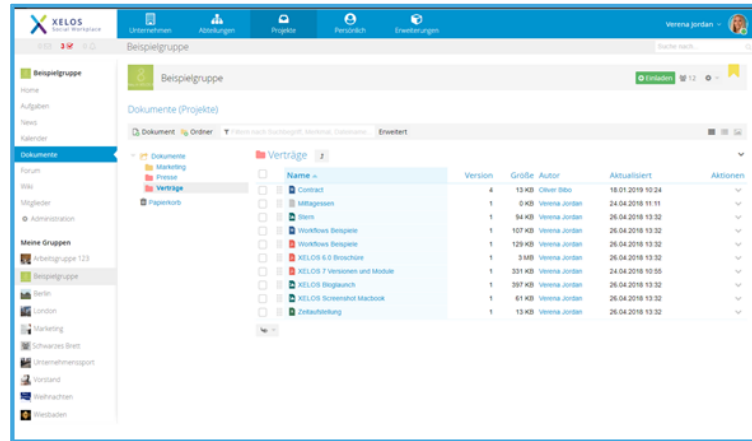
- Upload and manage large amounts of documents inside the DMS.

- Documents are saved with all important details.

- Set access rights for individual document folders.

- Full-text searching and tagging are supported.

## Overview over important appointments
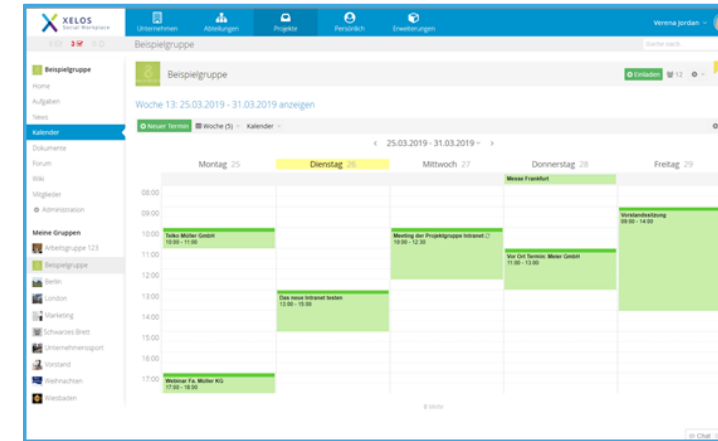
- Share calendars to organize your appointments with others.

- Several calendar views offer a great overview.

- Combine several calendars for a better overview.

- Search for and subscribe to public calendars.

Come to an agreement in the forum
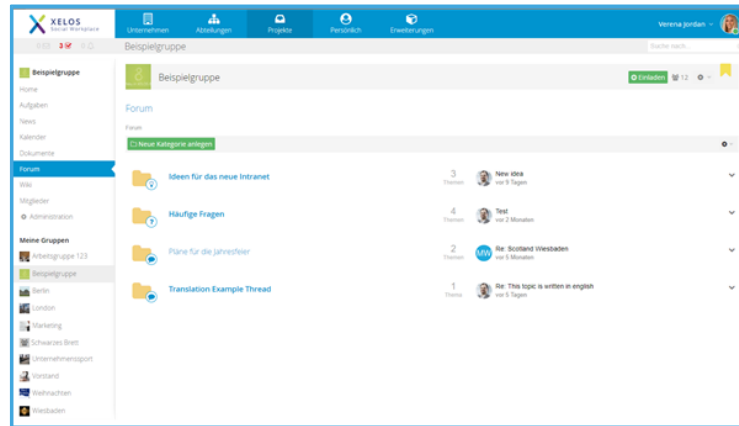
- Create new categories in the forum and allow access for individual users or groups of users.

- The group admin can appoint moderators to help with the forum.

- Threads can be either open, closed (with people unable to post) or "stay on top".

A wiki full of knowledge and infos
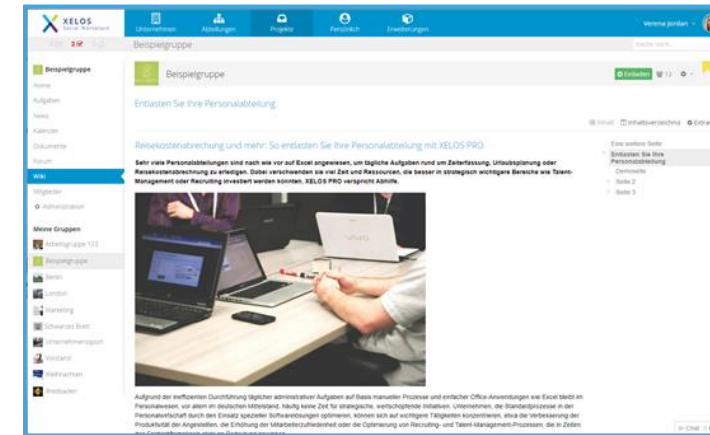
- Create wiki pages including attachments and links to other content.

- The WYSIWYG editor makes editing wiki pages a breeze.

- Contents of attachments (e.g. PDFs and Office documents) will also be indexed and are searchable from anywhere in the system.
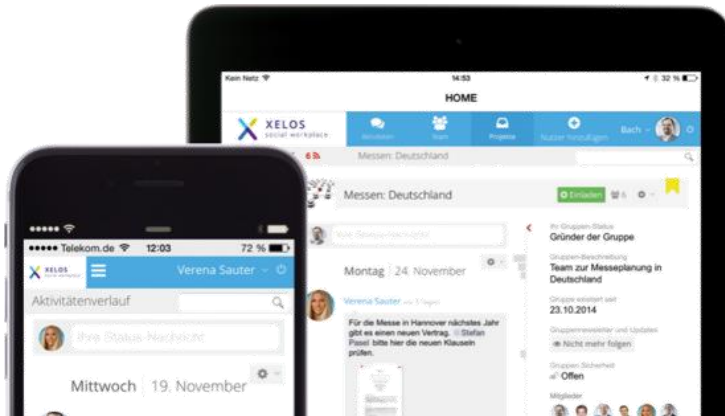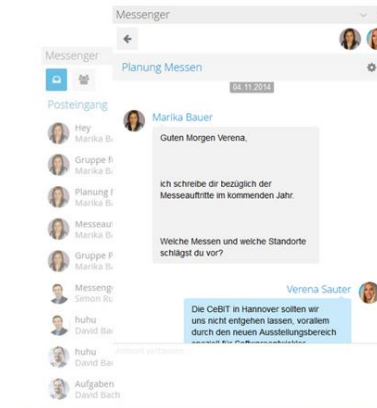
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Direct MS-Office integration
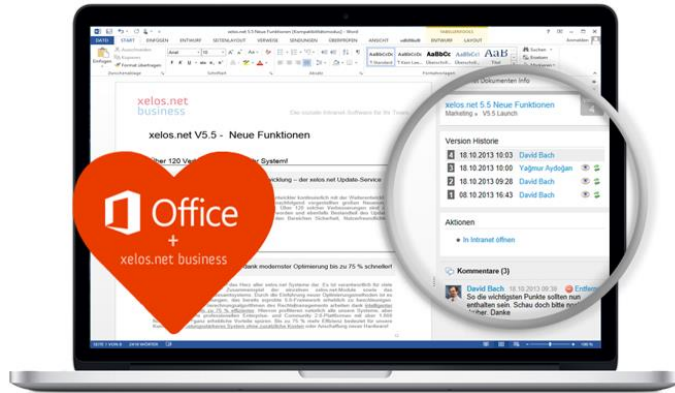
Multi language support (utf-8)

Mobile app

Secure team messaging

XELOS Social Workplace

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