Parallels® Panel

Parallels Small Business Panel 10.0: Quick Start Guide
Copyright Notice

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Patents pending in the U.S.

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Using Parallels Small Business Panel

Parallels Small Business Panel (hereinafter referred to as the Panel) is designed to address the following needs of small to medium sized businesses:

- **Online presence.** You can set up a company website for sharing information with business partners and customers, or selling goods and services online.
- **Company e-mail addresses.** You can set up e-mail accounts for the employees with protection from spam and viruses, and use mailing lists.
- **Intranet for employees.** You can set up an Intranet (an internal website inside a company's network) for company’s employees with password-protected access to collaboration tools and business applications: accounting, inventory, customer relationship management (CRM) solutions, databases, and more.
- **Cost-effective IT infrastructure.** You can reduce the cost of hardware and software licenses and maintenance efforts: simplified deployment and administration of the Panel and business applications on a single server does not require experienced IT staff.

When you are logged in to the Panel as administrator, in the top navigation area, you see the following tabs with icons and links:

- **Home.** Provides shortcuts to the most frequently performed operations:
  - Manage user roles and user accounts.
  - Register a domain name for a new website; add a website; fill it with text, graphics, and style templates using Site Editor.
  - View website visitor statistics.
  - Set up and manage e-mail addresses and mailing lists.
  - Upload files to the server and make them accessible to authorized users.
  - Select and install applications to websites.
- **My Services.** Provides shortcuts to the applications installed on the server, webmail, file management, and contact information of users.
- **Users.** Provides access to functionality for creating, modifying, deleting user accounts and user roles.
- **Mail.** Provides access to functionality for creating, modifying, deleting e-mail addresses and mailing lists.
- **Websites & Domains.** Provides access to functionality for registering domain names, creating, modifying, deleting websites, setting up hosting features, databases, subdomains, domain aliases, viewing website visitor statistics, and managing files published at the websites.
- **Applications & Scripts.** Provides access to functionality for installing, configuring, and removing Web applications that add useful features to your site, such as blog, photo gallery, online store, and other business applications.
- **Files.** Provides access to functionality for managing directories and files stored on the server.
• **Settings.** Provides access to functionality for configuring the settings that affect all services running on the server.

Above the tabs, the following icons are located:

• **My profile.** Specify your contact information, e-mail address, and set a new password for accessing the Panel. Here you can also set up mail forwarding and auto-reply for your e-mail address.

• **Log out.** Close your session when finished working with the Panel.

• **Help.** View the context-sensitive Administrator's Guide.

• **Getting Started.** This opens Quick Start Guide (this document) that will guide you through your first steps in the system: brand the Panel, set up a website, create user accounts, and install applications on a site.

In this document, you will find instructions that will help you accomplish the following essential tasks:

• Create a website.

• Add user accounts for your employees and provide them with e-mail addresses.

• Install business applications.

• Provide users with access to these applications.
To set up a website:
1. On the Home tab, click Create Website.
2. Type a domain name that you received as a part of your hosting package or previously registered with a domain name registration company.
   If you have not registered a domain name yet, click Register Domain Name and follow the onscreen instructions.
3. Specify the username and password that will be used for accessing the Web space over FTP.
4. Click OK.

To check if your website can be accessed by visitors:
1. Open the command-line interface on your local workstation (Start > Run... if you are using Microsoft Windows OS) and run the following command:
   \[ \text{nslookup } \text{<domain.name> } \text{<host.name>} \]
   Specify the domain name used by your website instead of \text{<domain.name>} and host name of your server instead of \text{<host.name>}. Host name of your server is the address you type in your browser to access the Panel. For example: nslookup example.com myserver.com.
2. If your website does not resolve after running this command ("Non-existent domain" or similar errors are displayed), contact your hosting service provider with the command above and the results of its execution, and request support assistance. If your website resolves after running this command, then run the following command:
   \[ \text{nslookup } \text{<domain.name>} \]
3. If your website resolves after this command, it means that your website can be accessed by visitors. If your website resolves after running the first command, but does not resolve after the second one, wait for 48 hours in order for DNS zone records of your domain to propagate in the Domain Name System. If your website does not resolve after 48 hours, contact your Hosting Service Provider with the commands above and the results of their execution, and request support assistance.

After you set up your website, you can start creating it with Site Editor by clicking Site Editor. It will open in a new browser tab or window, depending on your browser settings.
Site Editor is a powerful, flexible and easy-to-use tool that allows you to create your company's website from scratch. You can establish your online presence quickly and efficiently with the help of user-friendly Site Editor wizard. Site Editor comes with hundreds of different site templates (sets of Web pages with predefined but customizable structure and images), providing you with a variety of visual themes and tools to make your Web site nice-looking, functional and unique. Additional templates are installed as a separate component of the Panel.

For further instructions on creating your website using Site Editor, refer to Parallels Small Business Panel: Site Editor User's Guide. It is available by clicking Help while in Site Editor interface.

**Note:** Site Editor cannot publish a website if domain name used by this website resolves to IP address different from the one you selected upon setting up your website.
User accounts are created for your employees to give them access to business applications and various services available in the Panel. Employees with user accounts can log in to the Panel and use all applications and services that were made available to them.

When creating user accounts for your employees, you can also create e-mail addresses associated with your company's website and assign them to these user accounts. Employees can use their e-mail addresses for business correspondence with the customers and for communication with other employees. They can also configure such e-mail services as auto-reply and mail forwarding.

In this chapter:

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Understanding User Roles

User accounts are set up with help of user roles that correspond to the work-related activities performed by employees. When you create a new user account, you are prompted to select the required user role. A user role defines the following:

1. Which administrative privileges are granted to a user
2. Which Web applications (on page 14) are available to a user.

There are three predefined user roles in the Panel:

- Administrator
- Manager
- Employee

You can review and modify the Manager and Employee roles to suit your needs, or you can create your own custom roles.

User Roles Comparison Chart

<table>
<thead>
<tr>
<th>Action/Role</th>
<th>Employee</th>
<th>Manager</th>
<th>Administrator</th>
</tr>
</thead>
<tbody>
<tr>
<td>View other users information</td>
<td>+</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>(Privilege) Create/Edit/Delete users</td>
<td>-</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>(Privilege) Manage roles</td>
<td>-</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>(Privilege) Manage websites and domains</td>
<td>-</td>
<td>-</td>
<td>+</td>
</tr>
<tr>
<td>(Privilege) Change server settings</td>
<td>-</td>
<td>-</td>
<td>+</td>
</tr>
<tr>
<td>(Privilege) Install/Set up/Uninstall applications</td>
<td>-</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>(Privilege) Manage mail (Create/Edit/Remove mail accounts)</td>
<td>-</td>
<td>-</td>
<td>+</td>
</tr>
<tr>
<td>Change password used to log in to the Panel</td>
<td>+</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>Set up mail forwarding and automatic reply to incoming mail</td>
<td>+</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>(Privilege) Update personal information</td>
<td>-</td>
<td>-</td>
<td>+</td>
</tr>
<tr>
<td>Upload files to the server and share them with other users</td>
<td>+</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>(Privilege) Publish files on the Web</td>
<td>-</td>
<td>-</td>
<td>+</td>
</tr>
</tbody>
</table>
What Panel Items Can Users of Different Roles Access

**Employee**

Users assigned the employee role can access the following items in their Panels:

- **My Services** tab.
  Gives access to the applications installed on the server, webmail, file management functions, and the contact information of their colleagues.

- **Users** tab.
  Displays contact information of other users registered in the system.

- **Files** tab.
  Lets upload files to the server and share them with other users registered in the system.

- **My profile** icon.
  - Displays the user's contact information.
  - Allows to change the password used to log in to the Panel.
  - Allows to set up mail forwarding, and automatic reply to incoming mail.

- **Log out** icon.
  Ends user sessions in the Panel.

- **Help** icon.
  Opens a context-sensitive online help reference.

**Manager**

Users assigned the manager role can also create user accounts, create user roles and install applications and scripts on websites. The full list of the Panel items that a manager can access is as follows:

- **My Services** tab.
  Gives access to the applications installed on the server, webmail, file management, and user accounts management functions.

- **Users** tab.
  - Displays contact information of other users registered in the system.
  - Allows creating and managing user accounts and user roles.

- **Applications & Scripts**.
  Allows to install, configure, and remove Web applications that add useful features to websites, such as blog, photo gallery, online store, and other business applications.

- **Files** tab.
  Lets upload files to the server and share them with other users registered in the system.

- **My profile** icon.
  - Displays the user contact information.
  - Allows to change the password used to log in to the Panel.
  - Allows to set up mail forwarding and automatic reply to incoming mail.
Adding User Accounts

- Log out icon.
  Ends user sessions in the Panel.
- Help icon.
  Opens a context-sensitive online help reference.

Administrator

Users assigned the admin role can perform all operations available in the system. The items available to the administrator are described in the section Using Parallels Small Business Panel (on page 4).

Creating User Account

➢ To create a user account with an e-mail address for your company’s employee:

1. On the Home tab, click Create User Account and specify the employee’s contact name (for example, John Doe).
2. Create an e-mail address for this user account:
   a. Select Create e-mail address on this server.
   b. Type the desired address.
   c. Select the domain name under which the e-mail address should be created.

   If you want to associate an external e-mail address (not served by mail server of your information system) with this user account, select the option Use an external e-mail address instead and specify an existing external e-mail address.
3. Select a user role that corresponds to the position of the employee.
   User roles are used for assigning privileges and access rights to users. There are three predefined user roles: admin, manager, and employee. Admin role is allowed to perform all operations available in the system. Manager role can manage user accounts and user roles, install and manage applications on the server. Employee role is not allowed to perform any administrative tasks in the system.
4. Specify username and password used for accessing the Panel and its services.
5. Leave the User is active check box selected. Otherwise, the user will not be able to access and use applications within your information system.
6. Click OK to finish creating the user account.

After you have created user accounts for all your employees, you can notify them about creation of their accounts and the ability to access the Panel. Provide the employees with the address to open in their browser, the username and the password that you specified in the account properties.
You can install on a site one or several Web applications that will add the required services or functions to the site. This way you can easily add a photo gallery, a blog, an online store, or a specialized accounting or inventory application.

Let's install an online store application, such as, for example, Pinnacle Cart.

➢ To install Pinnacle Cart:

1. On the Home tab, click the Pinnacle Cart shortcut under Applications & Scripts.
2. Click Buy now.
   The Marketplace will open in a new browser window or tab.
3. Select the licensing options, specify your contact and billing information, and confirm the purchase. Your software activation code will be sent to your e-mail address.
4. When you receive the activation code, save it in a text file on your computer: You will need to enter this activation code during or after installation of the application.
5. Return to the Panel and click the Install button corresponding to Pinnacle Cart.
6. Read the license agreement for the application. If you accept the terms of the license agreement, select the I accept the terms of the license agreement check box, and click Next >.
7. Specify the following installation settings:
   - Software license activation code.
   - Path to installation directory. Select the website where you want to install the application, and type the desired directory name, if you want to install it into a specific directory.
   - Application title or site name. This will be shown to site visitors in the title bar of their Web browsers.
   - Administrator's username and password for access to the application. Select an existing user account to assign administrative rights to the application, or select the option Use administrative credentials not connected to any particular user, and type the application administrator's username and password.

If you select an already existing user account, then the user will be able to log in to the application management interface by clicking an icon that will appear in the user's Panel (on the My Services tab), or by visiting the Internet address shown on this screen.
If you set a custom username and password, then the user will be able to log in to the application management interface only by visiting the Internet address shown on this screen.

- Database administrator's username and password.

8. Click **Install**. After installation is finished, you will be prompted to customize shortcuts to the application.

9. If you want to set a custom application name and description that will show below the icon in the user's Panel (on the **My Services** tab), select an image for the icon, or remove the shortcut to the application from the user's Panel: click **Customize shortcut**, and make the necessary changes. Selecting the **Hide shortcut** check box removes the shortcut from the user's Panel.

**Note:** The changes made under the **Administrative access** group will affect how the shortcut to the application will appear in the Panel of the user who was appointed as application administrator.

The changes made under the **Public access** group will affect how the shortcut to the application will appear in the Panels of all other users who were granted access to the application.

10. Click **OK**.

After the installation of Pinnacle Cart is finished, the user who will administer the online store should be notified that new shortcuts to Pinnacle Cart administration are available in this user's Panel, on the **My Services** tab.
Providing Users with Access to Applications

After you have installed the required applications, you need to provide your users with the access to these applications.

➢ To grant access to application to users registered in the system:

1. On the Home tab, click User Roles.

2. Click Create User Role to create a new user role, or select an existing role from the list by clicking the role name.

3. Under the Access to applications group, locate the application you need, and select the corresponding Granted option.

4. Click OK.

Now all users who are assigned this role will be able to access this application by clicking the corresponding shortcuts in their panels (located on the My Services tab), and specifying their user account names and passwords.

5. If you decided to create a new role and assign it to the existing users who need access to the application, go to Users > User Accounts, click the user’s name you need, select the newly created role in the User role menu, and click OK.