

# HOMEROOM SERVER USER GUIDE

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# 1. Introduction

Getbusi is excited to provide you with the very best of today's technology. Getbusi's Homeroom is fast, flexible, user and eco-friendly. Student timetabling, notifications, notices, notes and personal scheduling is easier than ever with Getbusi's Homeroom. No more excuses for students forgetting when subjects are scheduled or assignments are due.

Homeroom replaces the old paper based student diary with mobile devices like the iPod and iPad. The app is a student oriented utility application that is able to display information from the school's databases. Key resources it can display include timetabling, notifications, notices and notes, in combination with local data such as diary notes and personal scheduling.

The Homeroom Suite includes Homeroom Server and the Homeroom App for iOS. Homeroom Server manages interactions with your school's pre-existing management systems, the Homeroom database and the Homeroom web interface which is accessible from any JavaScript-enabled browser on any device. The Homeroom App can be installed onto iOS devices (iPhone, iPad and iPod Touch) which have iOS 5.1 or later, to provide full interaction with the Homeroom Server including push notifications and full synchronisation of data.

Welcome to Homeroom.

# 2. About this Manual

This manual is intended for your organisation's designated Homeroom Administrator. An in-depth knowledge of IT concepts is not required to administer the Homeroom Server software, however the Administrator should read this guide to understand the full capabilities of the software. This manual assumes that Homeroom Server has been successfully installed, and the interface is accessible via a web-browser. If that is not the case, please refer to the **Installation and Network Configuration Guide**, which can also be found [online](#).

For assistance in the configuration of Homeroom Server, please first refer to the step-by-step instructions contained in this guide. You may also contact Getbusi support for additional assistance, if required:

Via web: <http://help.getbusi.com/>

Via email: [support@getbusi.com](mailto:support@getbusi.com)

Telephone: +61 3 6165 1555

## 3. Initial Software Configuration and Setup

This section documents the necessary steps to configure your Homeroom Server for the first time. The software should be installed on your Getbusi server, and the server properly configured for your network as per the Installation and Server Configuration Guide.

### 3.1. Pre-installation Checklist

Prior to configuring your Homeroom Server you should have at your disposal some information about your organisation's directory service, if any. Several different implementations of LDAP (Lightweight Directory Access Protocol) are supported:

- Windows Server 2003 / 2008 / 2008 R2 Active Directory
- OS X Server 10.5 or later Open Directory

#### 3.1.1. LDAP Checklist

All supported Directory Service types use an underlying variation of LDAP. Therefore the same information is required for each type.

In Windows Active Directory the LDAP information is not readily apparent. To view this information you may use the Windows Server utilities *LDP* or *ADSIEDIT.msc*, which can be opened from *Start -> Run*. For more information please see [this how-to](#).

LDAP Server IP Address:	192.168.1.2
Search Base:	e.g. DC=getbusi,DC=local
Bind Distinguished Username:	e.g. CN=Domain user,CN=Users,DC=getbusi,DC=local
Password for distinguished user:	e.g. domainuserspassword275!

Please focus your search base as to limit the number of groups that will be loaded from your domain. This will allow for much easier group management within Homeroom. You may optionally specify two additional search bases within the same directory.

### 3.2. Connecting to the Homeroom Server

You can access the Homeroom Server administration interface from any desktop computer on your local area network (LAN). You can connect to server either by its IP address, or by hostname, if there is an entry for the Homeroom Server server in your DNS.

To begin the wizard you must login with the default credentials of the built-in *admin* user:

- **Username:** admin
- **Password:** test

Open a web browser and connect to:

- When navigating by IP address: http://<your Homeroom Server server's IP address>
- When navigating by name: http://<your Homeroom Server server's DNS name>

You will be presented with the first page of the Initial Setup Wizard, the *End User Licence Agreement*.

### 3.3. End User Licence Agreement

The next screen you are presented with is a Licence Agreement. You should carefully read the terms of the Homeroom Server Licence Agreement. If you accept the terms of the licence, click the button that corresponds with: **Agree and Continue**. If you do not accept the terms of the licence agreement, you will not be allowed to continue.

### 3.4. Licensing

The *Licensing* screen allows you to activate a Homeroom Server licence. If you have recently purchased Homeroom Server or are an existing customer who is migrating to a new Homeroom Server you should have received your Licence Activation Key via Email. If not, please contact our Accounts team via [accounts@getbusi.com](mailto:accounts@getbusi.com).

If you have not purchased Homeroom Server and are interested in trialling it, please contact our Sales team via [sales@getbusi.com](mailto:sales@getbusi.com).

#### 3.4.1. Activate Your Homeroom Server Licence

To activate your licence click the **Activate licence** button. A dialogue window will appear. Copy and paste the **Licence activation key** from your email and then click the **Activate** button.

If there is any problem with activating your licence an error message will be displayed. If this occurs please contact Getbusi Support and provide the error message.

Click **Save and Continue** to proceed to the Administrator Password Reset.

### 3.5. Admin Password

For security reasons, you should change the Homeroom Server administrator password. On this screen you will be prompted to enter the new password to use for the built-in Homeroom Server admin user.

Click **Save and Continue** to proceed.

### 3.6. Customisation Settings

These settings allow you to modify your Homeroom Server's user interface. There are a number of visual customisations available to tailor the branding to your organisation.

- The **School Title** value will be used in main header at the very top of the interface where, by default, it says *Homeroom Server*.
- The **Timetable Scale** options allow you to configure the daily scale on which timetable events will be aligned. You may choose between *Periods* or *Hours*. Selecting *Periods* will require that you also configure the number of periods for the day. Selecting *Hours* will use the built-in start and end times of 8AM and 6PM, respectively.
- **Today Page URL** sets the webpage that will display in a narrow iFrame on the Today page where all users land after logging in. This is designed to display an external "bulletin" type webpage which is updated daily.
- The **Custom Logo** field allows you to upload a logo for your organisation that will replace the built-in Homeroom logo in the main header of the user interface. For best results, use a high-resolution square shaped *PNG* image with a transparent background.
- The **Base Header Colour** option allows you select which colour will form the radial gradient background of the main header. You may either enter your organisation's main colour in hexadecimal format or manually select one using the sliders.

Click **Save and Continue** to proceed.

## 3.7. Directory Settings

The next step in configuring your Homeroom Server is adding the details of your organisation's directory service. The service that is configured will be used to retrieve user and group information. Homeroom Server communicates with directory servers using Lightweight Directory Access Protocol (LDAP).

Please use the information identified in your [LDAP Checklist](#) to help you configure your directory settings.

### 3.7.1. Configure your directory service

1. Enter a **Server Description**. This is simply used as a unique label to distinguish this server from others that you may add to the Homeroom Server.
2. From the drop-down menu, select the **Directory Type** that matches the LDAP server you wish to authenticate with.
3. Enter the **Server IP Address** for this directory server.
4. Next enter the **Search Base** information for this LDAP service. The search base should be the full distinguished name of the domain. For example, a domain such as *getbusi.local* would have the distinguished name: *DC=getbusi,DC=local*
5. The **Username** field must also be fully distinguished. This user DOES NOT necessarily need to be an administrator. Note that the password will be stored as clear text in the filesystem so it's best to create a specific user for this role.
  - (a) By default Active Directory uses the *Display Name* field for its primary context so if you were using an account with the display name "Getbusi Auth" in the built-in "Users" folder, the distinguished name would be: *CN=Getbusi Auth, CN=Users, DC=getbusi, DC=local*
  - (b) By default Open Directory uses the *short name* field for its primary user context and *users* as the default container so if you were using an account with the short name "getbusi.auth" the distinguished name would be: *uid=getbusi.auth, cn=users, dc=getbusi, dc=local*
6. Enter the **Password** for the username you defined in the previous step. This password is stored in plain text in the filesystem, so do not use high-value credentials for this purpose.

When you have entered all the settings for your directory services you may click the **Save and load groups** button. The groups that were loaded from your search base will be displayed in the **Group Properties** area.

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We strongly recommend that a test user be created in your directory service to facilitate testing and troubleshoot any issues that may occur with directory synchronisation.

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### 3.7.2. Group Properties

The Group Properties area allows you to set permissions for each of your directory groups. These define which features the members of each group will have access to in the Homeroom Server. There are three levels of access privileges:

1. **Is Active** is the base level of access designed for student users. This will give access only to the Today, Diary, Timetable and Info menus.
2. **Is Staff** is designed mainly for teachers and will grant access to the same menus as Is Active as well as the Teacher section. The Teacher section provides management of Teacher Notes including creation, editing, reporting and managing custom recipient groups.
3. **Is Admin** will grant members access to the Global Settings and Information Items administration. These sections of the interface control crucial settings pertaining to how the server operates. Only groups of very select users (generally technical / I.T. staff) should have this level of access.

## 3.8. Authentication Settings

If you have requested a customised Authentication Module with your deployment of Homeroom you will be able to access the settings from here. Please refer to the specific documentation for the customised Authentication Module.

## 3.9. Email Settings

The Email settings allow you to define a mail configuration, including the FROM account which will be used for the following purposes:

- System Notifications
- Teacher note parent signature receipts.

To enable these features fill out the following options:

1. **SMTP Server Address:** The address of your mail sending server.
2. **SMTP Server Port:** The port your SMTP server accepts mail on.
3. **Username:** An account on your mail service that can be used to login to the SMTP server.
4. **Password:** The password for this account.

Click the **Save and Continue** button to proceed.



## 4. Homeroom Concepts

There are several different paradigms Homeroom for organising curricular and extra-curricular activities. These are used throughout the application.

The screenshot shows the Homeroom Server interface. At the top, there is a blue header with the 'HOME ROOM' logo and the text 'Homeroom Server'. Below the header is a navigation bar with links for 'Diary', 'Timetable', 'Info', 'Today', 'Teacher', 'Info Items', and 'Global Settings'. A user profile 'admin' is visible in the top right corner.

The main content area is divided into three sections:

- Left Panel:** A blue button labeled '+ Add Note' is at the top. Below it, a section titled 'EARLIER' shows a list of notes. The first note is 'Welcome to Homeroom' dated '17 Jan 2013'. A large circled '1' is overlaid on this note.
- Center Panel:** A large white box titled 'Welcome To Homeroom' contains introductory text and a list of uses for notes. A large circled '2' is overlaid on the text. At the bottom, it says 'Thursday, 17 Jan, 2013 Note created by admin'.
- Right Panel:** A calendar for 'January 2013' is displayed. A large circled '3' is overlaid on the date '17'.

### 4.1. Notes

Notes are small messages with a title and an optional URL link. All notes are recorded against a specific date and organised accordingly. Notes can be personal; created by a user specifically for their own purposes or they can be distributed to many recipients at once by a staff member with the relevant privileges.

**Teacher Notes** can be used to distribute a note to many recipients either by directory groups, directory users, classes, or a custom recipient group.

Teacher Notes may optionally include a **parent signature** requirement. A student may present a signable teacher note to their parent or guardian. If the signature form is agreed to, a confirmation email will be sent to the parent or guardian.

This versatile system can be used for many purposes such as:

- Homework schedules.
- School notices / bulletins / reminders.
- Parental consent slips.
- Class note taking.
- School events, semester dates, assemblies etc.

### 4.2. Timetables

Each Homeroom user will have a personal timetable imported from your organisation's timetabling system. Depending on your system settings, timetables will be displayed on either a timescale of 8AM to 6PM or a number of periods which you may define. Events are colour-coded by subject, where appropriate. For example, all English-related classes could be green.

Overlapping timetable events will be arranged horizontally within the day-of-the-week's column.

Users may also add personal timetable entries from within Homeroom.

### 4.3. Information Items

Information Items should be thought of like bookmarks of school web resources that are available to every user. These items can be defined by an administrator and can be viewed by any user. Where possible, the item will be displayed from within Homeroom, inside a frame, though an admin can choose to enable or disable this on a per-item basis. Typical information items could be:

- School's Homepage
- Today's Bulletin
- Library Catalogue
- School and House Prayers / Songs
- Newsletters / Communiqués
- Information to Parents

## 5. Diary

The Diary section is the home of each user's notes. Both teacher and personal notes are viewed here as well the adding and editing of new personal notes. The Diary section is split into three areas: **List (1)**, **Content (2)** and **Calendar (3)**.

The **List** area contains a list of the user's recent and upcoming notes. Each listed entry will display the title, date, colour code and a truncated excerpt of the note's message. They are sorted chronologically into *Earlier*, *Today*, *Tomorrow* and *Next Week*. Past notes will remain in the *Earlier* section for 2 days. Unread notes will be identifiable by a "new" label.

Once a note is selected it will be displayed in the **Content** area. Here, the note title and message will be displayed in full as well as the date and the author. If it is a teacher note that requires signing This form will be displayed inline with the message as well. Users may also edit and delete notes from the content area using the corresponding buttons.

The **Calendar** area features an interactive calendar that allows a user to browse through all past and future notes by date and open them in the content area.

### 5.1. Adding and Editing Personal Notes

To add a new personal note click the **Add Note** button a the top of the List area. Or if you wish to edit a note, simply open in it up in the Content area and then click the corresponding **edit** button. Either way, you will be presented with the **Note Edit** form with the following fields:

- **Title**
- **Message**
- **Date**
- **URL** (this will create clickable link at the bottom of the note).

### 5.2. Deleting Personal Notes

To delete a personal note simply select it from the list or calendar and then click the corresponding **Delete** button in the content area. You will be prompted to confirm the permanent deletion of the note.

## 5.3. Parent Signing

Teacher notes that require a parent's signature will be displayed in the content area with an extra blue form. A parent/guardian may sign these forms by (optionally) adding feedback and then selecting the **Yes** button. The parent's signature and message will be recorded for the teacher who created the note.

## 6. Timetable

The Timetable section is available to all active users. From here a user may view their timetable for the current week as imported from your organisation's timetabling system. Users may also add personal timetable events from this section.

Events will be displayed for all 5 days of the current school-week; Monday - Friday. Depending on your Customisation Settings, each day's column of events will be rendered on a scale of periods or by hour (8:00AM - 6:00PM).

### 6.1. Adding and Editing Personal Timetable Items

To add a new personal timetable item click the **Add Timetable Item** button in the top-left corner. Or if you wish to edit a personal timetable item, click on it and you will be presented with a dialogue box where you may edit or delete the item.

In either scenario you will be presented with the **Timetable Item Edit** form with the following fields:

- **Room**
- **Day**
- **Period**
- **Teacher**
- **Class description**

Click the **Save** button to commit your changes to the timetable item.

## 7. Info

The Info menu is where all users can access your organisation's Information Items. This list of resources can be edited by users with the *Is Admin* privilege level.

Info Items will usually be displayed inside a frame within the Homeroom interface. However, not all websites will load correctly this way. If the frame is blank then you may use the **Open in new window** button.

For more on Information Items please read [section 4.3](#).

## 8. Teacher

The Teacher section is where all the management of Teacher Notes takes place. Only users with the *Is Staff* privilege level will have access to this section. From here, users may create, edit and report on teacher notes as well as manage groups of recipients to which the teacher notes can be sent.

Custom recipient groups may contain any combination of directory groups, directory users, or classes. This is intended to make the distribution of teacher notes and flexible as possible. For example, a teacher may like to send a note only student council members or members of a particular club that is not tracked as directory group or a class.

## 8.1. Creating and Editing Teacher Notes

To create a new teacher note click the **Create new note** button or to edit an existing note, click the **edit** button that corresponds to the note in the table below.

In either scenario you will be presented with the **Teacher Note Edit** form with the following fields:

- **Title**
- **Message**
- **Date**
- **Link** Clickable URL link at the bottom of the message.
- **Require Parent Signing** check box
  - **Question** A short message, separate from the main note message
  - **Signature Type** Read Confirmation or Yes/No Question
  - **Verify Parent signature** Yes or No. Parent will be emailed upon form confirmation

### Recipients

- **Users** Auto-completing list of active users.
- **Classes** Auto-completing list of classes loaded from your external management systems.
- **User Groups** Auto-completing list of active directory groups.
- **Custom Groups** Auto-completing list of your

## 8.2. Creating and Editing Custom Recipient Groups

To create a new custom recipient group click the **Create Custom Group** button or to edit an existing note, click the **edit** button that corresponds to the group in the table below.

In either scenario you will be presented with the **Custom Group Edit** form with the following fields:

- **Title** A short descriptive name for the recipient group.
- **Users** Auto-completing list of active users.

Simply give the group a descriptive name, select the members from the auto-complete field and then click the **Save** button.

## 9. Global Settings

The **Global Settings** menu in the primary navigation bar provides access to the global system settings pages. This menu is only accessible by users with admin privileges.

### 9.1. Licence

The Licence page displays the system's current licensing details and how they relate to the system. A valid licence:

- Must not have expired.
- Must have a hardware hash that matches the system.

If one of the above requirements is not met the licence will become invalid. If your licence becomes invalid a warning will be displayed throughout the web admin interface for 30 days or until a valid licence is activated. After the 30-day grace period the system will lock-out the entire web admin interface except for the *Licence* page.

#### 9.1.1. Obtaining your licence

You will need to contact either Getbusi, or your Getbusi reseller to obtain a licence. Once you have requested a licence, a licence will be generated for you. You will receive an email with an activation key and instructions on how to activate your licence from the Homeroom Server web admin interface. If you purchased Homeroom Server through a reseller, you should receive directions from them on how to obtain your licence activation key.

#### 9.1.2. Activating your licence

To activate your licence click the **Activate licence** button. A dialogue window will appear. Copy and paste the **Licence key** from your email and then click the **Activate** button.

If there is any problem with activating your licence an error message will be displayed. If this occurs please contact Getbusi Support and provide this error message.

## 9.2. Customisation Settings

These settings allow you to modify your Homeroom Server's user interface. There are a number of visual customisations available to tailor the branding to your organisation.

- The **School Title** value will be used in main header at the very top of the interface where, by default, it says *Homeroom Server*.
- The **Timetable Scale** options allow you to configure the daily scale on which timetable events will be aligned. You may choose between *Periods* or *Hours*. Selecting *Periods* will require that you also configure the number of periods for the day. Selecting *Hours* will use the built-in start and end times of 8AM and 6PM, respectively.
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- The **Custom Logo** field allows you to upload a logo for your organisation that will replace the built-in Homeroom logo in the main header of the user interface. For best results, use a high-resolution square shaped *PNG* image with a transparent background.
- The **Base Header Colour** option allows you select which colour will form the radial gradient background of the main header. You may either enter your organisation's main colour in hexadecimal format or manually select one using the sliders.

## 9.3. Directory Settings

In this section you may configure your Homeroom Server to integrate with your organisation's directory service. The service that is configured will be used to retrieve user and group information. Homeroom Server communicates with directory servers using Lightweight Directory Access Protocol (LDAP).

End users may then use their directory credentials to login to the Homeroom App (web / iOS / Android).

Please use the information identified in your [LDAP Checklist](#) to help you configure your directory settings.

### 9.3.1. Configure your directory service

1. Enter a **Server Description**. This is simply used as a unique label to distinguish this server from others that you may add to the Homeroom Server.
2. From the drop-down menu, select the **Directory Type** that matches the LDAP server you wish to authenticate with.
3. Enter the **Server IP Address** for this directory server.
4. Next enter the **Search Base** information for this LDAP service. The search base should be the full distinguished name of the domain. For example, a domain such as *getbusi.local* would have the distinguished name: *DC=getbusi,DC=local*
5. The **Username** field must also be fully distinguished. This user DOES NOT necessarily need to be an administrator. Note that the password will be stored as clear text in the filesystem so it's best to create a specific user for this role.
  - (a) By default Active Directory uses the *Display Name* field for its primary context so if you were using an account with the display name "Getbusi Auth" in the built-in "Users" folder, the distinguished name would be: *CN=Getbusi Auth, CN=Users, DC=getbusi, DC=local*
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6. Enter the **Password** for the username you defined in the previous step. This password is stored in plain text in the filesystem, so do not use high-value credentials for this purpose.

When you have entered all the settings for your directory services you may click the **Save and load groups** button. The groups that were loaded from your search base will be displayed in the **Group Properties** area.

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We strongly recommend that a test user be created in your directory service to facilitate testing and troubleshoot any issues that may occur with directory synchronisation.

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The Group Properties area allows you to set permissions for each of your directory groups. These define which features the members of each group will have access to in the Homeroom Server. There are three levels of access privileges:

1. **Is Active** is the base level of access designed for student users. This will give access only to the Today, Diary, Timetable and Info menus.
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## 9.5. Email Settings

The Email settings allow you to define a mail configuration, including the FROM account which will be used for the following purposes:

- System Notifications
- Teacher note parent signing receipts.

To enable these features fill out the following options:

1. **SMTP Server Address:** The address of your mail sending server.
2. **SMTP Server Port:** The port your SMTP server accepts mail on.
3. **Username:** An account on your mail service that can be used to login to the SMTP server.
4. **Password:** The password for this account.