SYBASE®

Portal Interface User’s Guide

Enterprise Portal

6.0

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Contents

About This Book

Audience

This book is for anyone who uses Sybase® Portal Interface.

How to use this book

This book contains these chapters:

- Chapter 1, “Introduction,” is an overview of Portal Interface.
- Chapter 2, “Getting Started,” tells how to set up and begin using your Portal Interface account.
- Chapter 3, “Creating and Using Page Groups and Pages,” tells how to create your own pages and page groups.
- Chapter 4, “Creating and Using Portlets,” explains how to create and add portlets.
- Chapter 5, “Searching the Portal,” tells how to use basic and advanced search, and how to use search agents.

Related documents

Enterprise Portal printed documentation The following Enterprise Portal documents are available in hard copy in the Enterprise Portal 6.0 product container:

- The Enterprise Portal installation guide for your platform explains how to install the Enterprise Portal software.
- The Enterprise Portal release bulletin for your platform contains last-minute information not documented elsewhere.

Enterprise Portal online documentation The following Enterprise Portal documents are available in PDF and DynaText format on the *Enterprise Portal 6.0 Technical Library* CD:

- The *Enterprise Portal Developer’s Guide* describes the Portal Studio user interface, how to use the Portal Studio’s tools to create several types of portlets that can be deployed to the Portal Interface, and how to use the Portal Studio to manage portlets, portlet templates, portlet catalogs, and portal pages.

- The *Enterprise Security Guide* explains the Enterprise Security architecture and describes how to set up both basic and advanced security models.

Note The *Enterprise Portal Administration Guide* is not being released for Enterprise Portal 6.0. Many functional changes have occurred in Enterprise Portal 6.0, and much of the Administration Guide's content is either obsolete or has been incorporated into other books in the Enterprise Portal 6.0 documentation collection.

Other sources of information

Use the Sybase Getting Started CD, the Sybase Technical Library CD and the Technical Library Product Manuals Web site to learn more about your product:

- The Getting Started CD contains release bulletins and installation guides in PDF format, and may also contain other documents or updated information not included on the Technical Library CD. It is included with your software. To read or print documents on the Getting Started CD you need Adobe Acrobat Reader (downloadable at no charge from the Adobe Web site, using a link provided on the CD).
- The Technical Library CD contains product manuals and is included with your software. The DynaText reader (included on the Technical Library CD) allows you to access technical information about your product in an easy-to-use format.

  Refer to the *Technical Library Installation Guide* in your documentation package for instructions on installing and starting the Technical Library.
- The Technical Library Product Manuals Web site is an HTML version of the Technical Library CD that you can access using a standard Web browser. In addition to product manuals, you will find links to EBFs/Updates, Technical Documents, Case Management, Solved Cases, newsgroups, and the Sybase Developer Network.

  To access the Technical Library Product Manuals Web site, go to Product Manuals at http://www.sybase.com/support/manuals/.

Sybase certifications on the Web

Technical documentation at the Sybase Web site is updated frequently.

v **Finding the latest information on product certifications**

1. Point your Web browser to Technical Documents at http://www.sybase.com/support/techdocs/.
2. Select Products from the navigation bar on the left.

3 Select a product name from the product list and click Go.

4 Select the Certification Report filter, specify a time frame, and click Go.

5 Click a Certification Report title to display the report.

v **Creating a personalized view of the Sybase Web site (including support pages)**

Set up a MySybase profile. MySybase is a free service that allows you to create a personalized view of Sybase Web pages.

1 Point your Web browser to Technical Documents at http://www.sybase.com/support/techdocs/.

2 Click MySybase and create a MySybase profile.

Sybase EBFs and software updates

v **Finding the latest information on EBFs and software updates**

1 Point your Web browser to the Sybase Support Page at http://www.sybase.com/support.

2 Select EBFs/Updates. Enter user name and password information, if prompted (for existing Web accounts) or create a new account (a free service).

3 Select a product.

4 Specify a time frame and click Go.

5 Click the Info icon to display the EBF/Update report, or click the product description to download the software.

Conventions

The syntax conventions used in this manual are:

Key	Definition
commands and methods	Command names, command option names, utility names, utility flags, Java methods/classes/packages, and other keywords are in lowercase Arial font.
variable	Italic font indicates: • Program variables, such as *myServer* • Parts of input text that must be substituted, for example: `Server.log` • File names

Key	Definition
File | Save	Menu names and menu items are displayed in plain text. The vertical bar shows you how to navigate menu selections. For example, File | Save indicates “select Save from the File menu.”
`package 1`	Monospace font indicates: • Information that you enter in a graphical user interface, at a command line, or as program text • Sample program fragments • Sample output fragments

If you need help

Each Sybase installation that has purchased a support contract has one or more designated people who are authorized to contact Sybase Technical Support. If you cannot resolve a problem using the manuals or online help, please have the designated person contact Sybase Technical Support or the Sybase subsidiary in your area.

CHAPTER 1

Introduction

Portal Interface is the graphical user interface (GUI) for the Sybase Enterprise Portal. It is an out-of-the-box portal solution that provides an intuitive Web-based interface for deploying a high-performance portal with built-in user personalization.

Features

Portal Interface provides numerous features to help you easily personalize your portal view. You can:

- Create personal pages and page groups
- Customize the layout of your pages
- Add and configure portlets and content sources
- Take advantage of search functionality:
    - Natural language search (concept-based, fuzzy, Boolean, proximity)
    - Search agents, both organization and user-defined
    - Index and search external data sources; for example Lotus Notes databases
    - Index and search internal and external Web sites

Tools and functions

Portal Interface consists of tools that help you create and manage your pages.

- Page tabs – let you name your pages so you can navigate between them. The number of page tabs in a page group varies, depending on the length of the page tab names you choose. If you run out of space, Portal Interface automatically activates the page groups feature.
- Page groups – allow you to organize your pages into sets of pages. You can add more pages to your account than you can view in a single browser window.
- Toolbar – located below your page tabs, the toolbar contains some major functions necessary to create and manage your pages. Additional functions display as icons above the page tabs.
- Portlets – display the contents you have selected from Portal Interface or the Web.

Portlets

Each user's environment consists of a series of page groups, which in turn contain pages. The pages contain portlets that provide a customized view of content.

Portlets allow users to embed customized Web-based content and applications into their portals. Portlets can provide access to enterprise applications, personal productivity tools, or any content or legacy data across the enterprise, including mainframes.

Portal Interface includes a server-resident database and utilities that store and retrieve Web content, subject to the roles assigned to the user. Portal Interface supports a wide variety of Web applications and user customization while operating under large user volume.

Security

Note Security is not applicable for Enterprise Portal – Information Edition or Enterprise Portal – Enterprise Edition running the Demo installation.

Portal Interface operates with the Enterprise Portal version 6.0 security system. When you log in to Portal Interface, Enterprise Security:

- Authenticates users based on names and passwords
- Checks to see if user passwords are nearing expiration
- Identifies user roles

This information is used during login to gain access to the system. Specifically, the administrator associates pages with security roles. Pages and portlets that are part of the user’s configuration are checked at login, and eliminated if not part of the user’s currently assigned roles.

During a user’s session, customizable features allow users to add additional portlets to their pages. The list of portlets presented for addition is filtered based on the user’s assigned roles established at time of login.

Architecture

The Enterprise Portal architecture allows for the separation of presentation elements, business logic, and the data model. It supports Java ServerPages (JSP) as a means of generating presentation elements. Modules can be written in Java to extend the framework, and new portal applications can be added and configured using XML. This provides an inheritance model for the customization of presentation and business logic. The Web container-based architecture works within any Web-container that supports the version 2.3 specification for JSPs and Servlets.

The Enterprise Portal architecture allows:

- Parallel page loading
- End users to create portlets and capture their own content
- Tab-based navigation with support for groups of tabs
- Access to secure content is always authenticated
- Asynchronous rendering of portlets

CHAPTER 2

Getting Started

This chapter explains how to access Portal Interface and how to set up and maintain a user account.

Topic	Page
Starting Portal Interface	5
Logging in to Portal Interface	6
Maintaining your account	8
Changing an expired password	11

Starting Portal Interface

Note To access Portal Interface on Windows, use Internet Explorer 5.5 + or Netscape Navigator 7.01+.

To access Portal Interface on Solaris, use Netscape 7.0.

To access Portal Interface, enter the following URL in a Web browser, substituting your portal's host and domain name.

`http://HOSTNAME.PORTALDOMAIN:8080/onepage/index.jsp`

In a production environment, it may not be necessary to use the port number in the URL.

For example, if your machine name is "mymachine," and your portal domain is "sybase.com," enter:

```
http://mymachine.sybase.com:8080/onepage/index.jsp
```

If you are running the Demo version of Enterprise Portal, enter this URL:

```
http://demo.sybase.com:4040/onepage/index.jsp
```

Logging in to Portal Interface

After Portal Interface starts, you see the Guest page, where you sign in to your existing account or create a new account.

Figure 2-1: Guest page

Last refreshed: Oct-29 01:16 PM (PST)

Welcome to the Sybase Portal

The only portal to focus on ease of use for end-users, developers and administrators. It provides end-users an intuitive and flexible user interface. Developers and administrators have a web-based point and click interface to develop, maintain and deploy portlets and portals. This unique, integrated environment benefits portal customers by reducing the time and cost associated with portal projects.

We hope you enjoy it.

Last refreshed: Oct-29 01:16 PM (PST)

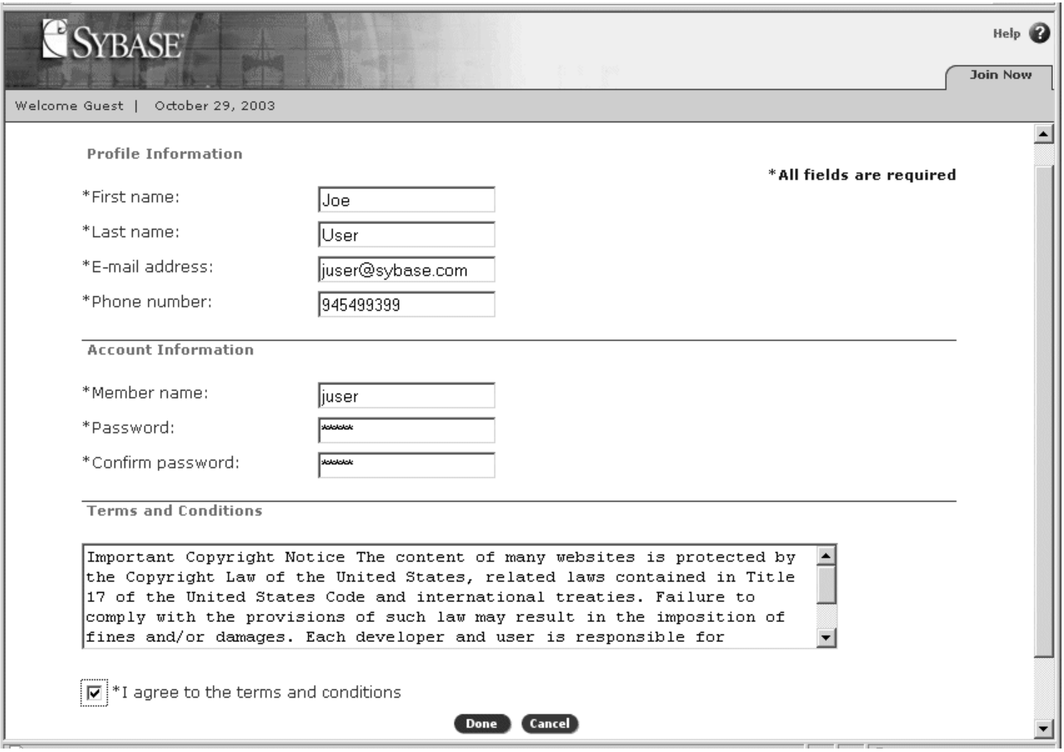
If you already have an account, enter your Member Name and Password, then click Sign In.

If you do not have an existing account, click Join Now.

v **Creating your account**

After you click Join Now, you see the self-registration page shown in Figure 2-2.

Figure 2-2: Self-registration



*All fields are required

*First name: Joe

*Last name: User

*E-mail address: juser@sybase.com

*Phone number: 945499399

*Member name: juser

*Password: *****

*Confirm password: *****

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☑ *I agree to the terms and conditions

Note When you self-register in Portal Interface, use a different user name and password for different portal co-brands.

---

1 Enter your profile information:

  - First name
  - Last name
  - E-mail address
  - Telephone number

2 Enter the account information:

  - Member name – your user name for logging in to Portal Interface.
  - Password
  - Password again for confirmation

3 Read the terms and conditions. Select the “I agree to the terms and conditions” option, and click Done.

You see the Portal Interface default page group. To add pages and portlets, you must first add a new page group. See “Adding page groups” on page 13.

Resetting your password

If you have a Portal Interface account, but have forgotten your password, click Reset Password beneath the Password text box on the Guest page. You see the Reset Password dialog box.

Enter your member name and click Done. An e-mail message is sent to the portal administrator, who will reset your password and notify you of the new password.

Maintaining your account

After you create your Portal Interface account, you see the Default page group. Portal users cannot make changes to the Default page group.

Click the My Info icon at the top of any page to view and change your account information, including your password.

The My Info page contains the information you provided when you created your Portal Interface account. Check your personal information from time to time to verify that it is current.

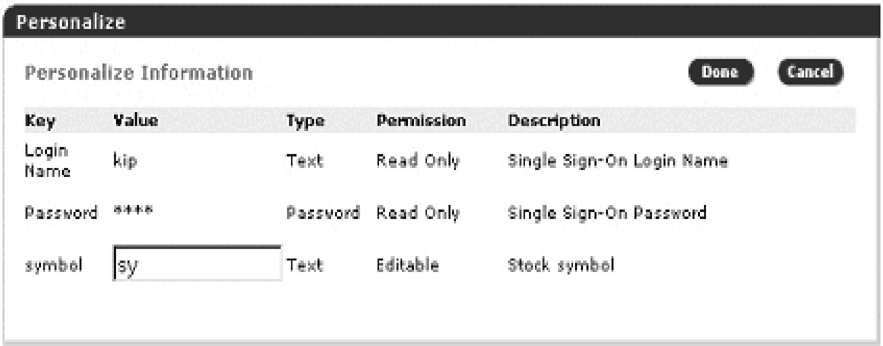
Personalize

If you add portlets to your pages that use personalization keys, you see the Personalize tab on the My Info page.

Personalization keys allow developers to create portlet input fields. For example, a developer creates a weather portlet where users enter a zip code or select from a list of zip codes. This allows the user to automatically see the weather they want whenever they access the weather portlet.

Click Personalize to show all keys and their values for all the portlets to which you have access. Only keys that are used by portlets that you have access to are shown. See Figure 2-3.

Figure 2-3: Personalize



Key	Value	Type	Permission	Description
Login Name	kip	Text	Read Only	Single Sign-On Login Name
Password	****	Password	Read Only	Single Sign-On Password
symbol	sy	Text	Editable	Stock symbol

The fields shown in the Personalize window are:

- Key – the key that is used by the portlets to look for personalized input values for different users based on who is using the portlet.
- Value – you can set this to show different values. This field is not editable if the Permission field is “Read Only.”
- Type – indicates the type of the value field. The different types for the value field are:
    - Text – any string type data.
    - Password – password type value. This displays as asterisks when entered.
    - Select – you can specify a set of items to show in a drop down list. The list of values must be delineated by commas in the text box.
- Permission – this indicates whether you can change the value of the field.
- Description – a text description of the key.

Proxy server

A proxy server is a server that acts as an intermediary between an internal user and the Internet. A proxy server is associated with all, or part, of a gateway server that separates the Enterprise Portal network from the outside network, and a firewall server that protects the Enterprise's network from outside intrusion.

If you use a proxy server, Enterprise Portal routes HTTP requests and responses between clients and the proxy server unless the host name is on a list that can bypass the proxy server.

If you use a proxy server, you must get a proxy user name and password from the proxy server administrator and register them with Portal Interface.

v **Registering proxy user names and passwords with Portal Interface**

1. Log in to Portal Interface. See “Logging in to Portal Interface” on page 6.
2. Click My Info at the top of the page.
3. In the My Info window, click the Proxy tab.
4. In the Proxy Information window, enter:
    - Password – the password you use to log in to Portal Interface
    - Proxy User Name – the proxy user name
    - Proxy Password – the proxy password
    - Confirm Proxy Password – enter the proxy password again to confirm
5. Click Done.

Changing an expired password

If your company has implemented the password expiration feature, you must change your password every *n* number of days; where *n* is the number of days in which system passwords expire. The Portal Security Officer (PSO) or system administrator configures this value when they customize Enterprise Portal for your enterprise.

When password expiration is enabled, the portal checks your password’s expiration time each time you log in.

Changing your password when it is set to expire

If the portal detects that your password is about to expire, you see this message when you log in:

```
Your password will be expiring in 1 days.
Use the MyInfo button to change it before then.
```

Click My Info at the top of any page. When the My Info page appears, enter your existing password, enter your new password, enter the new password again for confirmation, then click Done.

Changing your password after it expires

If the portal detects that your password has expired, and the account is still within the time period where you are allowed to change your password, the Change Password form displays and you are prompted to complete these fields:

- Current Password – your current password displays as asterisks.
- New Password – enter your new password.
- New Password – enter the same password you typed in the previous New Password field.

Click Continue.

If the password change is successful, you are authenticated using the new password and sent to your Portal Interface pages.

If the password change is unsuccessful, you return to the login form and receive a warning message that describes the error.

Note If your password goes beyond the grace period during which you can change it, your login fails and you see a message telling you to contact your system administrator.

CHAPTER 3

Creating and Using Page Groups and Pages

You can create new page groups, pages, add predefined pages, change existing pages, or delete pages you no longer want.

The first time you log in to Portal Interface, you see the default page group. You cannot make any changes to the default page group. To personalize Portal Interface, you must first add new page groups. See "Adding page groups" on page 13.

Topic	**Page**
Managing page groups and pages	13
Sharing user pages	20

Managing page groups and pages

Use Manage Pages to edit, delete, and add pages and page groups. You can also sort pages within page groups. Choose the page group you want to manage from the page group drop-down list on the right of the toolbar, and click Manage Pages.

Adding page groups

A page group is a set of pages that are grouped together. All pages are organized within page groups, which appear in the browser window. When you create pages, you can choose the page group you want your page to appear in. The current page group is shown in the box on the far right in the toolbar.

v **Creating new page groups**

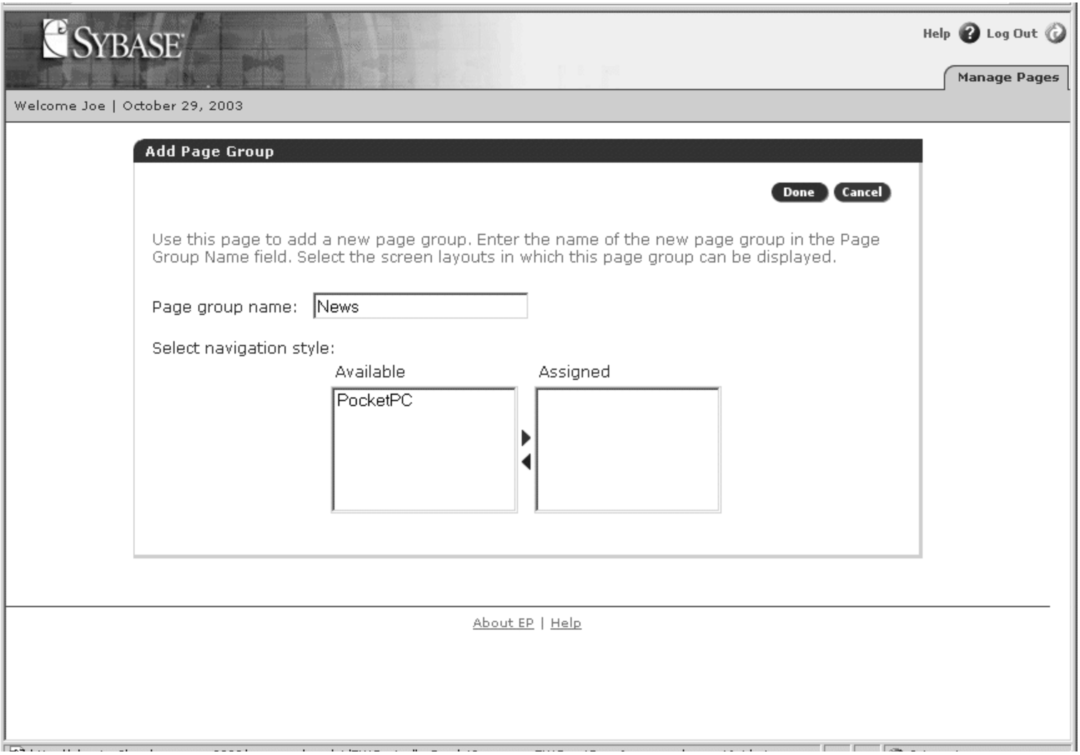
You can create new page groups at any time.

1 Click Manage Pages.

2 In the Manage Pages window, click Add Page Group.

3 In the Add Page Group window, enter a name for the page group.

Figure 3-1: Add page group



Use this page to add a new page group. Enter the name of the new page group in the Page Group Name field. Select the screen layouts in which this page group can be displayed.

Page group name: News

Select navigation style:

Available	Assigned
PocketPC	

4 Optionally, you can select additional devices from available navigation styles. The navigation style allows you to specify how you navigate pages based on your operating system and browser.

When you create a page group, select the navigation style from the Available list, then click the right arrow to move it to the Assigned list. Click the left arrow to remove the navigation style from the Assigned list.

5 Click Done.

You see the first page of the page group you just created. The first page of the new group is automatically assigned the same name as the page group.

The new page group now appears in the page group drop-down list on the toolbar.

Personalize Portal Interface by adding pages and portlets. See “Creating pages” on page 16, and “Adding portlets to pages” on page 25.

Manage pages options

Once you create page groups, you can manage those page groups. From the Manage Page window, you can:

- Edit page groups
- Add page groups and pages
- Delete page groups and pages

v Editing page groups

1 From the page group you want to edit, click Manage Pages.

2 Click Edit to the left of the page group name.

3 In the Edit Page Group window, you can:

   - Change the name of the page group by entering the new name in Page Group Name, and clicking Done.
   - Choose devices for the navigation style of the pages within the page group:
     - a Select the navigation style for the page group, click the right arrow to move it to the Assigned list.
     - b Click Done.
   - Change the order of the way pages appear within the page group:
     - a In the Select Page Order box, select the page name from the list, and click the up or down arrow to the right of the box to change the order of the pages.
     - b Click Done.

v Deleting page groups or pages

1 From the page group you want to manage, click Manage Pages.

2 In the Manage Pages window, you see the page group, and the pages within that page group. To delete the page group, click the trash can icon to the left of the page group. Deleting a page group deletes all of the pages within the page group, and the action cannot be undone.

To delete a page from the page group, click the trash can icon to the left of the page name.

Note You cannot delete the last page in a page group. Every page group must contain at least one page.

A pop-up window appears asking you to confirm the deletion. To proceed with the deletion, click OK. Click Cancel to cancel the deletion and return to the Manage Pages window.

3 When you have completed the deletions, click Done.

v **Adding pages to a page group**

- Add a page to the page group from the Manage Pages window by clicking the Add Page link to the right of the page group name. The Add Page window displays. See “Creating new pages” on page 17.

Creating pages

There are four types of pages used by Portal Interface.

Note Default pages, catalog pages, and guest pages are created in Portal Studio. User pages are created in Portal Interface.

- Default – active approved default pages are automatically added to new Portal Interface accounts. Default pages are typically called “home pages.” You can have one or more home pages.

  You see one or more default (home) pages based on your roles. The way the portlets display on the pages is also based on your roles. You cannot make changes to the default page groups and pages.
- Catalog – created by the administrator in Portal Studio. You can add catalog (predefined) pages by selecting Add Page in Portal Interface. You cannot make any changes to catalog pages.

  Add catalog pages by selecting Add Page in Portal Interface.
- Guest – guest pages appear when anyone accesses the Portal Interface URL. This is where you log in, or create your Portal Interface account if you do not have one. You cannot make any changes to guest pages.

- User pages – personal pages created by a user in Portal Interface. User pages do not display in Portal Studio.

You can add pages using Manage Pages (see “Adding pages to a page group” on page 16), or by using Add Page located at the top of the window. See “Creating new pages”below.

v Creating new pages

1 Select the page group where you want your page to appear. Click Add Page at the top of the window.

2 Select “Add new page,” and enter a name for your new page. Choose a unique name for your new page; if the page name already exists within that page group, you cannot create the new page.

3 Select the Page Layout, and click Done. See “Changing the page layout” on page 18.

4 If the current page group is full, the Add Page Group window appears, and you must add a new page group to continue. Select the page group where you want your page to appear, or create a new page group. See “Adding page groups” on page 13.

Click Done.

Your new page name appears in the page tabs, at the far right. You can change the order of the page tabs by editing the page group. See “Editing page groups” on page 15.

v Adding premade (catalog) pages

1 Select the page group where you want your page to appear. Click the Add Page icon at the top of the window.

2 Select “Add pre-made page,” then select the page you want to add from the pages listed in the box. Click Done.

Note If you already added the page, you are prompted to give the page a new name. Pages must have unique names within the page group.

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3 If the current page group is full, the Add Page Group window appears. Select the page group where you want your page to appear, or you can create a new page group. See “Creating new page groups” on page 13.

Click Done.

Your new page name appears in the page tabs, at the far right. You can change the order of the page tabs by editing the page group. See “Editing page groups” on page 15.

v **Deleting pages using the toolbar**

1 Click Delete Page from the toolbar.

2 At the Confirm Delete window, click OK to delete the page, or click Cancel to cancel the deletion. Once you click OK, deletions cannot be undone.

You can also delete pages using the Manage Pages window. See “Deleting page groups or pages” on page 15.

Changing the page layout

You can rename pages, change the column layout of pages, or change the order of the portlets on a page.

Note The way the portlets display on the pages is based on your roles. You cannot make changes to the layout of the default pages.

v **Changing the page name**

1 Click Change Layout from the toolbar.

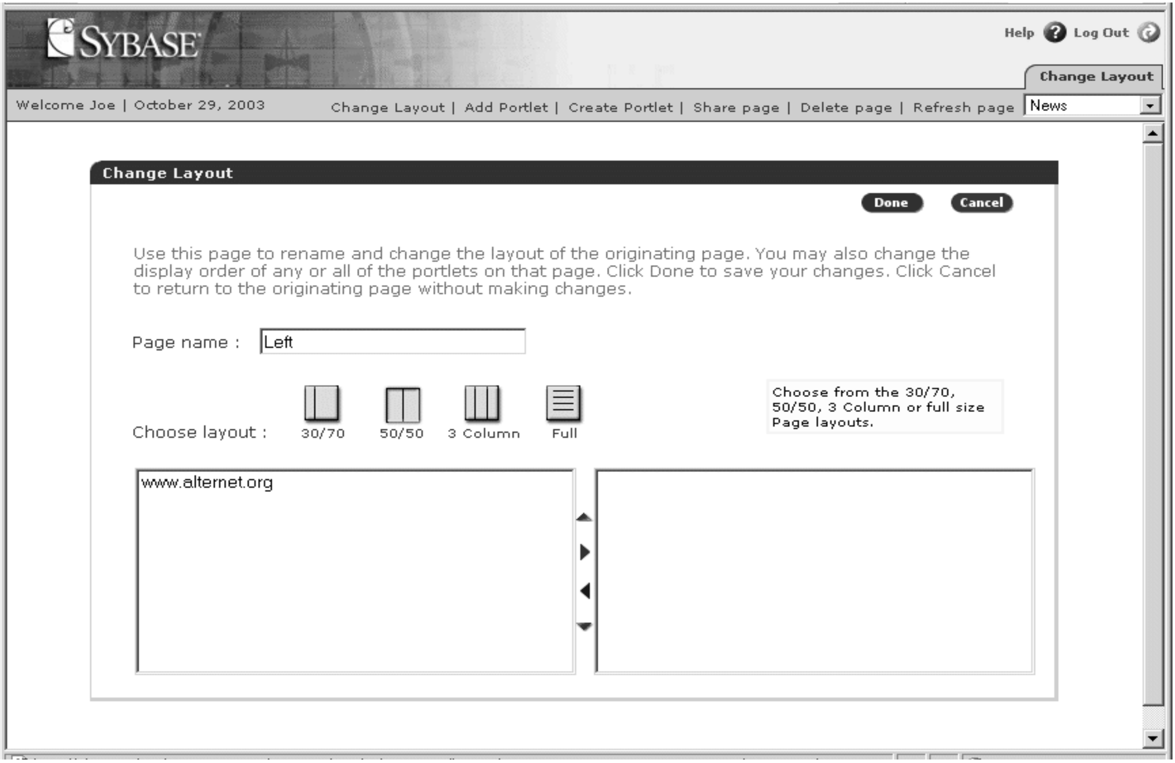
2 In the Change Layout window, enter the new name of the page in the Page Name field. You cannot give your page the same name as an already existing page, the page name must be unique.

3 Click Done at the top right of the window.

Changing the page layout

1 Click Change Layout from the toolbar.

Figure 3-2: Change layout



Use this page to rename and change the layout of the originating page. You may also change the display order of any or all of the portlets on that page. Click Done to save your changes. Click Cancel to return to the originating page without making changes.

Page name : Left

Choose from the 30/70, 50/50, 3 Column or full size Page layouts.

2 In the Page Layout window, click the icon for the layout you prefer:

- 30/70 – portlets are arranged side-by-side, with the left-side portlets using 30% of the horizontal space and the right-side windows using 70% of the horizontal space.
- 50/50 – organizes your page with portlets side-by-side, each side using 50% of the horizontal page space. This is the default layout format.
- 3-column – organizes your page in three columns. Portlets are arranged side-by-side, with the left column using 25% of the horizontal page space, the middle column using 50% of the page space, and the right column using 25% of the page space.

When you select the 3-column layout, the default widths of the columns can be changed by clicking the Width drop-down list above each column to set the desired width of each column.

Note When changing column width in Portal Interface, columns must occupy a range of width between 20% and 60%. For a greater range of width, use Portal Studio to design three-column page layouts.

- Full page – the portlets are arranged vertically, with each window using 100% of the horizontal space.

3 Click Done when you have the desired layout, or click Cancel to return to your page without making changes.

v **Changing the layout of the portlets on a page**

1 Click Change Layout from the toolbar.

2 Select the portlet you want to move, and use the arrows to change its location on the page.

Use the up arrow to move the portlet up on the page. Use the down arrow to move the portlet down on the page. Use the right and left arrows to move the portlet to a different column on the page.

3 Click Done when you have the desired layout, or click Cancel to return to your page without making changes.

Sharing user pages

Enterprise Portal allows Portal Interface users to share pages of content (portlets) with other valid, registered Portal Interface users. Only user-created pages can be shared; that is, catalog pages and default pages cannot be shared.

This feature requires the use of e-mail to send the shared page links—Universal Resource Locators (URLs).

When sharing user pages:

- Users can share user pages across portal installations that use the same portal database. Recipients select the resource from which they want to receive pages from a drop-down list, before they preview and accept a shared page.

- You cannot share pages that contain secure portlets; that is, portlets with content captured from secure Web sites.
- You cannot share default pages.
- When you send a page to someone who has never logged in to Portal Interface, the recipient must first self-register, then accept or decline the shared page.

  Note Users cannot self-register through the shared page accept or decline function.

- If the recipient does not have the appropriate role to see a portlet on the shared page, that portlet is not visible to the recipient.

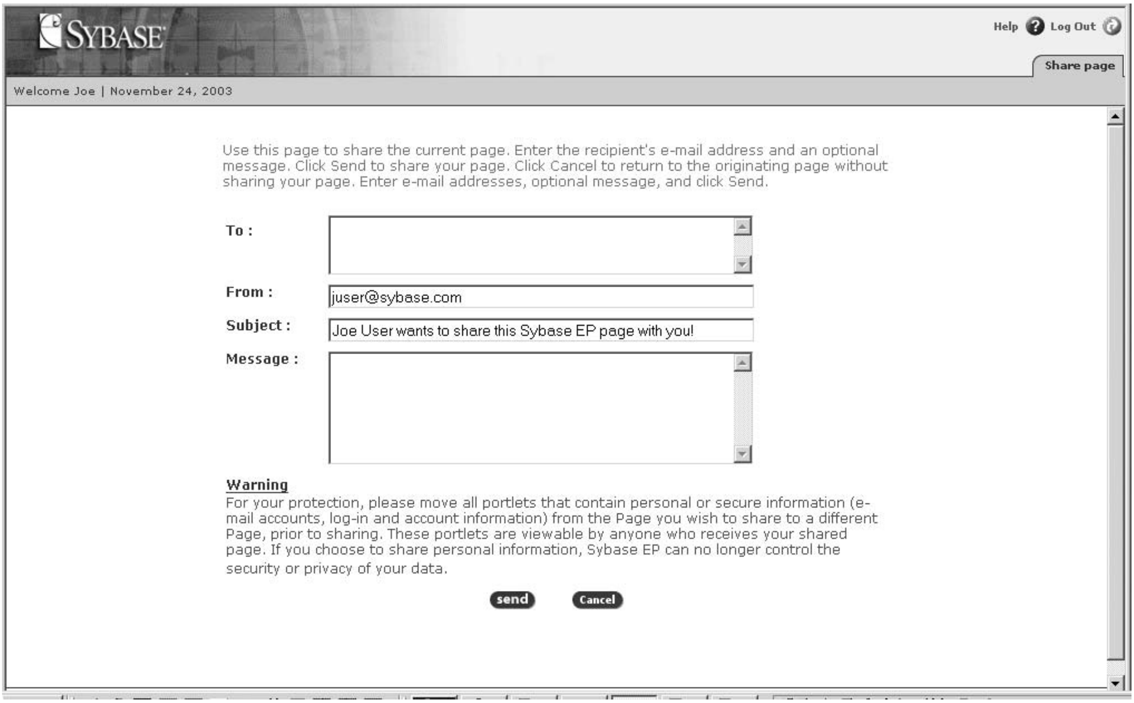
Example

This section illustrates how to share user pages.

v **Sending a page**

1. A valid Portal Interface user (User S) decides to share a page of portlets with a friend who is also a valid Portal Interface user.
2. User S selects the page to share and clicks the Share Page link on the secondary navigation control in Portal Interface.
3. User S fills out the requested share page information, including an optional text message and clicks Send.

Figure 3-3: Sharing a page



Welcome Joe | November 24, 2003

Use this page to share the current page. Enter the recipient's e-mail address and an optional message. Click Send to share your page. Click Cancel to return to the originating page without sharing your page. Enter e-mail addresses, optional message, and click Send.

To :

From : juser@sybase.com

Subject : Joe User wants to share this Sybase EP page with you!

Message :

Warning
For your protection, please move all portlets that contain personal or secure information (e-mail accounts, log-in and account information) from the Page you wish to share to a different Page, prior to sharing. These portlets are viewable by anyone who receives your shared page. If you choose to share personal information, Sybase EP can no longer control the security or privacy of your data.

4. A message displays to the sender (User S) stating that the shared page has been sent. User S acknowledges the confirmation and clicks Done.

v **Accepting a shared page**

1. The recipient (User R), receives an e-mail message indicating that another portal user has shared a page with them. User R opens the message and clicks the provided link.

2 The portal displays the window.

3 User R, the recipient, enters his or her user name, password and the resource from which they want to receive and save shared pages, then clicks Sign In.

4 User R sees the Share Page Preview window. A Share Page tab displays, listing the page being shared and the options to accept or decline the shared page.

   - Accept – you see the shared portal page you accepted.
   - Decline – removes the shared page. When you decline the shared page, you return to your default portal page.

   Once the recipient accepts the shared page, the system adds it to the shared page group. The recipient of the shared page returns to the portal and to the shared page that they just accepted.

CHAPTER 4

Creating and Using Portlets

Portlets are small windows that users see on their Portal Interface pages. Portlets contain information that is specified by the user and drawn from various data sources, like newsfeeds and databases.

Adding portlets to pages

You can personalize your pages by adding portlets from the catalog provided by Portal Interface, or by creating your own portlets by capturing the information you want from the Web.

Note You can only add portlets to your personal pages. You cannot add portlets to the default pages.

The catalog

The catalog contains predefined portlets that you can add to your Portal Interface pages. The catalog is organized by category and subcategory. The available pre-defined portlets are listed beneath the subcategory.

For example, there might be a category called “Local.” Click “Local” to see a list of subcategories, such as “weather,” “news,” and “real estate.” Click any of the subcategories to see a list of available portlets.

v **Adding portlets from the catalog**

1 Click Add Portlet from the toolbar.

2. In the Add Portlet window, click the category of interest. A list of available portlets appears beneath the main category.
3. Click the portlet you want to add to your page. You can add duplicate portlets to the page by clicking the portlet multiple times.
4. Click Done to close the Add Portlet window.

v **Creating portlets from the Web**

1. Click Create Portlet from the toolbar.
2. In the Create Portlet, Step 1of 3 window, enter the URL of the Web site from which you want to get your portlet, and click Go.

Warning! The content of many Web sites is protected by the Copyright Law of the United States, related laws contained in Title 17 of the United States Code, and international treaties. Failure to comply with the provisions of such law may result in the imposition of fines and/or damages. Each developer and user is responsible for compliance with applicable law in the use and reproduction of copyrighted content.

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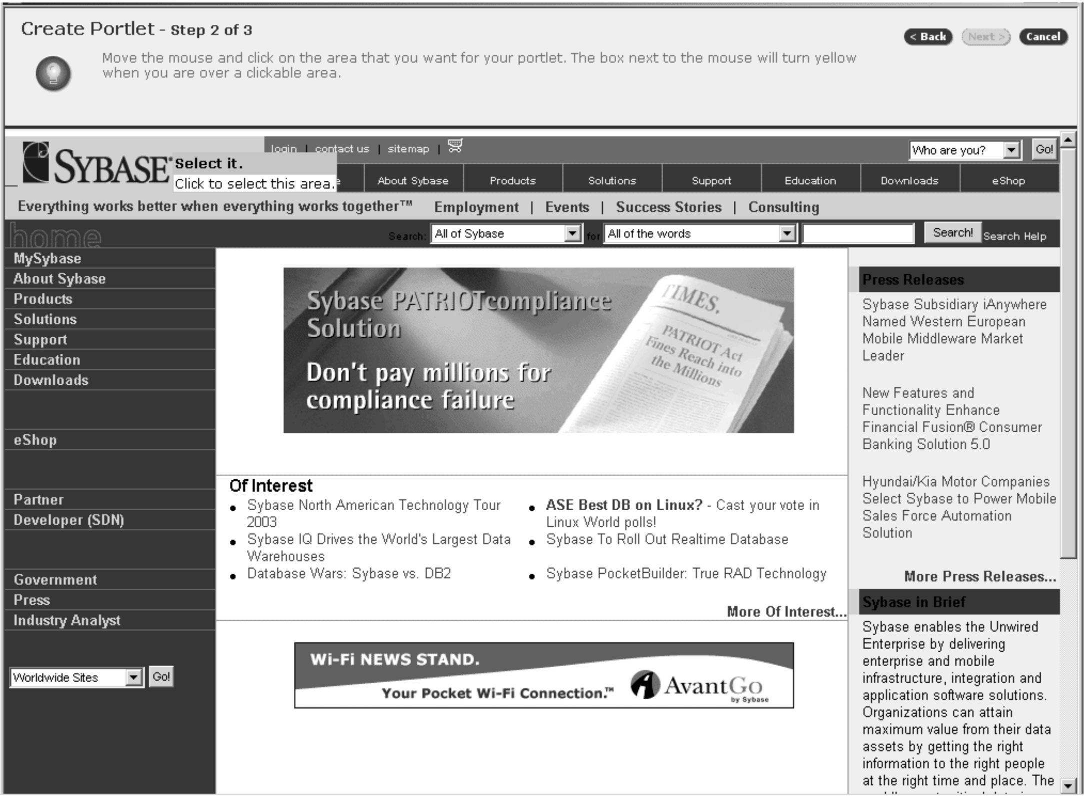
3. The Web site whose URL you entered appears in the Create Portlet – Step 1 of 3 window. Browse the site for the content you want to add to your page, and click Next, at the top right corner of the window.
4. In the Create Portlet, Step 2 of 3 window, move the mouse around the Web site until you find the object you want to use in your new portlet.

   This can be an image, a list, a table cell, or some other entity. Not all objects on a page are clickable because of the way a site constructs its pages. You can tell if an object is clickable by looking for the box next to your cursor to turn from orange to yellow.

   When the box turns to yellow, left-click the object to select it.

Figure 4-1: Creating a portlet step 2



Move the mouse and click on the area that you want for your portlet. The box next to the mouse will turn yellow when you are over a clickable area.

Select it.
Click to select this area.

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Hyundai/Kia Motor Companies Select Sybase to Power Mobile Sales Force Automation Solution

Sybase enables the Unwired Enterprise by delivering enterprise and mobile infrastructure, integration and application software solutions. Organizations can attain maximum value from their data assets by getting the right information to the right people at the right time and place. The

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Note When you create a portlet using one-click capture, and the portlet content contains numerous links, some of the links may not work properly due to underlying JavaScript or redirect code in the link content.

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5 In the Create Portlet, Step 3 of 3 window, a preview window opens to show all objects that are nested within, and associated with, the selected object. Each one of these groups of objects is a window.

If the preview window contains more than one page of possible portlets, the Show More button appears. Click Show More to see the next page of portlets. As you look through the portlets, the Show Less button appears, so you can move back through the previously viewed pages of portlets.

Click Add, located to the left of the content you want to add to your page. You can add the entire page, or choose selected objects from the page.

Figure 4-2: Creating a portlet step 3

Create Portlet - Step 3 of 3

Select the option you like best. Select Show More to display more content options.

Display this whole page in portlet.

6 If you are adding a portlet from a secure site, you are prompted for your Portal Interface secure password. If you have not set one up, you can create one now.

When you add a secure portlet to a page, you are prompted for its secure password before the page displays.

Note Do not add secure portlets to guest pages. To access secure portlets, you must use HTTPS.

Editing portlets

You can rename portlets, choose different display options for portlets, and move portlets to different pages. You can also refresh, minimize, delete, or edit portlets on your pages.

v **Renaming portlets**

1. Click the Edit link at the top right of the portlet you want to rename.
2. Enter the new name for the portlet in the Rename Portlet field.
3. Click Done.

Refreshing portlets

You can refresh your portlets to get the most current information from the portlet host. For example, you may want to get current stock quote information. Refresh your portlets by clicking the Refresh link in the portlet title bar. You can refresh all of the portlets on a page by clicking the Refresh link in the page toolbar.

You can also choose an automatic refresh rate so that the portlet refreshes at the intervals you specify.

v **Setting the automatic refresh rate**

1. Click the Edit link located at the top right of the portlet you want to set the refresh rate for.
2. From the Edit Portlet window, choose the refresh rate from the drop-down menu.

   You can choose from these automatic refresh rates:

   - Daily (default)
   - 6 hours
   - 2 hours
   - 1 hour
   - 30 minutes
   - 15 minutes
   - 5 minutes
   - 1 minute

3 Select Display Last Refreshed to display the date and time the portlet was last refreshed.

4 Click Done to save your changes.

Changing the way the portlet displays on the page

If you put many portlets, or large portlets, on your page, you may not see the entire page on one screen, or your page may load slowly. You can selectively minimize or maximize the portlets on a page by clicking the minimize or maximize icon on the right of the portlet title bar.

Note Available display options vary, depending on the browser you are using.

v Setting the default height

You can force your window height to be a specific size, or you can show the entire window. The default value is to “show all,” which means the entire portlet displays on the page.

1 Click the Edit link located at the top right of the portlet you want to change the height for.

2 From Set Default Height, select the height you want the portlet to display at from the drop-down menu. The available default heights change according to whether or not you are using the iFrame option.

With the iFrame option selected, you can choose from these portlet heights:

- Small
- Medium
- Large
- Full page
- one and a half
- Two pages
- Show all (default)

The non-iFrame option has these heights available:

- Small

- Medium
- Large
- Show all (default)

v **Setting display options**

1 Select from these display options:

  - iFrame – select this option to have new windows open when you click links.
  - No Pop-ups – select this option so when you click links within the portlet, the information displays in the same window. This option is available only if the iFrame option is selected.
  - Display CGI Parameters– allows you to submit your own parameter values to return personalized content. This option is available only if the iFrame option is selected and you are editing a portlet that has parameters.

2 Click Done to save your changes.

v **Moving portlets to different pages**

1 Click the Edit link located at the top right of the portlet you want to move.

2 In the Edit Portlet window, select the page you want to move the portlet to from the “Move to a different page” drop-down list. This option appears only if you have more than one page in the current page group.

3 Click Done.

Deleting portlets

You can delete portlets from your page by clicking the delete icon in the portlet title bar. A Confirm Delete window appears. Click OK to continue with the deletion, or click Cancel to cancel the deletion and return to the originating page.

Note You cannot delete default portlets from default pages. You can only delete portlets you have created on your personal pages.

Once you delete a portlet, it is removed from your account. If you want the portlet on the page after you have deleted it, you can add it again. See “Adding portlets to pages” on page 25.

To move the portlet to another page, use the Edit link. See “Moving portlets to different pages” on page 31.

CHAPTER 5

Searching the Portal

The Portal Interface search portlets allow you to execute a search across multiple sites at one time and then to show the search results from each site in separate portlets, all on the same page.

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Agent search	37
Channel search	38

The basic search and advanced search portlets and pages are available from the catalog (pre-defined) pages. You can select the search portlets and pages after you complete your registration. See “Adding premade (catalog) pages” on page 17.

Basic search

To perform a basic search:

1 Enter your search criteria in the “Search the portal for the following words” field.

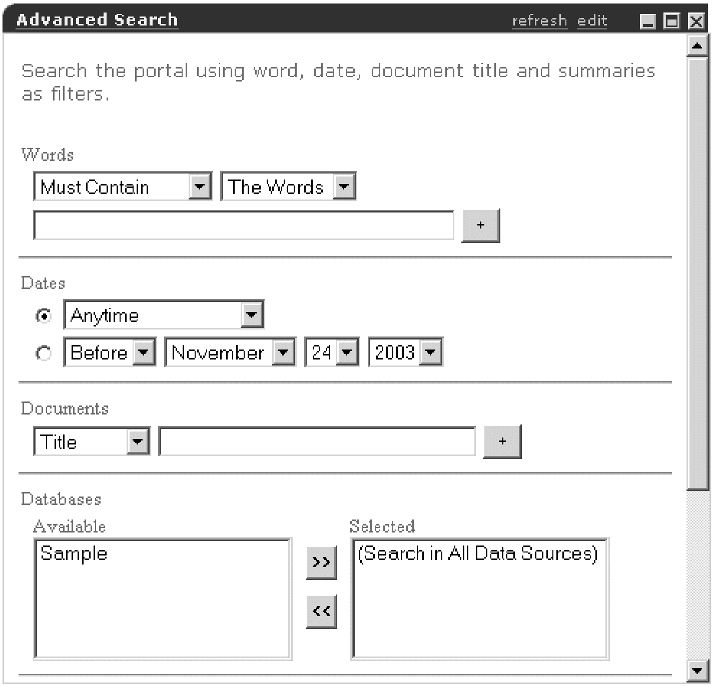
2 Click Search.

3 The results display in a separate window. Select the box next to one or more documents, and click Suggest More to retrieve similar documents from the source of the search you performed.

Advanced search

Advanced search allows you to specify a more detailed search criteria. Once you select the criteria, verify the Data Source and Results entries, then click Search. Click Clear to remove the currently displayed search criteria.

Figure 5-1: Advanced search



Search the portal using word, date, document title and summaries as filters.

Words

Must Contain ▾ The Words ▾

Dates

● Anytime ▾

○ Before ▾ November ▾ 24 ▾ 2003 ▾

Documents

Title ▾

Databases

Available: Sample

Selected: (Search in All Data Sources)

Word filter search

Word Filter search – select “Must contain,” “Should contain,” or “Must not contain” from the drop-down list on the left to specify whether your search result must, should, or must not contain what you select in the next drop-down list.

Choose one of the following from the drop-down list box on the right:

- The words – a sequence of characters to search for in the dynamic reasoning engine (DRE) databases. Enter the sequence of characters on which you want to search in the entry field below the drop-down lists.

- The person – this has a special meaning based on Autonomy's implementation. Any two or more consecutive words starting with capital letters are considered to be the name of a person. A one-word name receives the same treatment as a single word. Enter the sequence of characters on which you want to search in the entry field below the drop-down lists.
- The phrase – a sequence of words. All the words are searched for in the same order in the DRE databases. Enter the sequence of words on which you want to search in the entry field below the drop-down lists.

Note Clicking the plus (+) sign replicates the Word Filter section so that you have multiple entry fields (up to a maximum of 32) for a search. Clicking the minus (-) sign deletes the most recently added entry field.

Date search

Date search allows you to restrict searches by date. Choose "Anytime," "in the last week," "in the last 2 weeks," "in the last month," "in the last 3 months," "in the last 6 months," "in the last year," or "in the last 2 years."

The bottom left field lets you search after or before a date that you select from the drop-down list. For example, to search for information after January 1, 1999, select After and use the drop-down lists to specify January 1, 1999.

Document search

Document search allows you to select the title of a document or a summary, then enter the title or summary for your search choice. The duplicate fields allow you to perform two completely different searches. For example, you could select title for one search and summary for the second.

Note Click the plus (+) sign to replicate the Document Search section so that you have multiple entry fields (up to a maximum of 32) for a search. Click the minus (-) sign to delete the most recently added entry field.

Database search

The Databases Available field is populated with databases available to the search engine. You can select 0 or more database. If you select 0, all databases are queried.

To restrict the search to a specific set of databases, click a database name in the Available list, then click the right arrow to move that database to the Selected list.

To remove a database from a search, click the database name in the Selected list, then click the left arrow to remove that database name from the list.

Results

You can specify the maximum number of returns for your search and the relevancy by percentage of your search:

- # of Results – enter the maximum number of search results returned. Enter only a numeric value. The default is 10. If you set this field to 0 (zero) or leave it blank, the number of results is unrestricted.
- Min. Relevancy – enter the percentage of how closely you want the returns for your search to match your query. Enter only a numeric value. The default is 80%. If you leave this field blank, then 0 (zero) is used as the minimum relevancy.

In the Sort Search Results By drop-down list, choose to sort your search results by either Date or Relevancy.

Click Search to perform the search; click Clear to clear the contents of all the search fields. Clicking Clear also removes any additional entry fields you created by clicking the plus (+) button in the Word Filter and Document Search sections.

The results matching your search criteria display. Select the box next to one or more documents and click Suggest More to retrieve similar documents from the selected databases.

Click the Back button on your browser to return to the original search screen.

Agent search

An agent is a saved query, an automated search process. When you create an agent, you “train” the agent to retrieve a list of links matching the criteria you entered.

v **Performing an agent search**

1. To activate an agent, select the agent from the List of Agents, and click Execute. The search results display in the Search Agents portlet.
2. Refresh the portlet to return to the list of agents.

v **Creating a new agent**

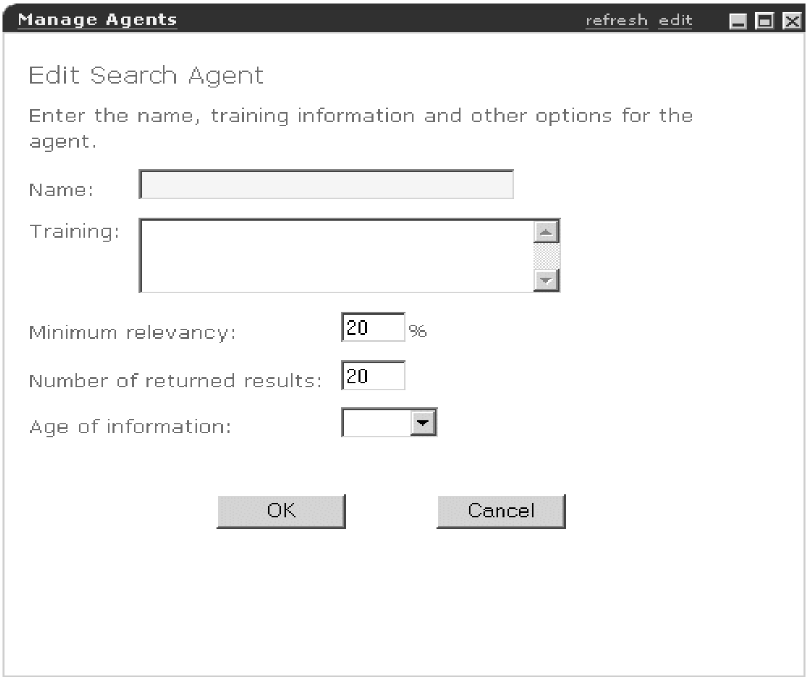
1. In the Manage Agents portlet, click New. The Edit Search Agent page displays.
2. Complete:
   - Name – enter a name that describes the type of job this agent will retrieve for you. Be specific so you can distinguish between agents if you choose to use more than one (for example, “Programs, C++” for one, and “Programs, Java/Java Script” for another).
   - Training – type a word or phrase in the text box that defines the results you want to see.

   Note To get fewer results, use a minus sign (-) before a word to exclude pages containing that word. Include a space before the minus sign but not after. For example, type “animals -cats” to find pages that contain the word “animals” but not the word “cat.”

   To get more results, use wildcards. Type an asterisk (*) at the end of a word or partial word. For example, typing “part*” returns pages that include “partner,” “particle,” “participate,” and so on.

   - Min. Relevancy of Returned Results – returns results based on a minimum ranking of the percentage you enter here.
   - Number of Returned Results – choose the number of results you want to display each time you activate this Agent’s predefined search.
   - Age of Information Returned – select a time period to search for Web results that are within that time period. Leave this option blank to see results from any time period.
3. Click OK.

Figure 5-2: Manage Agents



Edit Search Agent

Enter the name, training information and other options for the agent.

Name:

Training:

Minimum relevancy: 20 %

Number of returned results: 20

Age of information:

You return to the Manage Agents page. Click Refresh next to the List of Agents drop-down list to see your new agent.

Channel search

Channels—created by the administrator—are containers you can use to group predefined searches together in a way that is significant to the enterprise or administrator. For example, there might be a channel called “Company Information” with subchannels for “Finance,” “HR,” and “Administration.”

When you click a channel’s name, you see a list of subchannels. Click on a subchannel to select it. Click Run to activate the search according to the criteria defined by the administrator for the selected subchannel.

The results from an activated subchannel search display in a new window.

Channel results

The results of an activated subchannel search display in a new window as follows:

- Weight – the percentage ranking of the results.
- Title – the title of the result.

Index