



Portal Interface User's Guide

Enterprise Portal

6.1

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Sybase, Inc., One Sybase Drive, Dublin, CA 94568.

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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.

Related documents

Enterprise Portal documentation The following Enterprise Portal documents are available in the Enterprise Portal 6.1 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 6.1 Technical Library CD:

- The *Enterprise Portal Developer’s Guide* describes the Web Studio user interface, how to use the Web Studio’s tools to create several types of portlets that can be deployed to the Portal Interface, and how to use the Web Studio to manage portlets, portlet templates, portlet catalogs, and portal pages.
- The *Enterprise Portal Feature Guide* provides an overview of the features.
- The *Mobile Application Development Tutorial* provides tutorials for using the features included in Unwired Accelerator for users who have an Unwired Accelerator license.

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.

❖ 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.

❖ 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

❖ 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.
<i>variable</i>	Italic font indicates: <ul style="list-style-type: none"> • Program variables, such as <i>myServer</i> • Parts of input text that must be substituted, for example: <div style="text-align: center;"><i>Server.log</i></div> • File names
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.”

Key	Definition
package 1	Monospace font indicates: <ul style="list-style-type: none"><li data-bbox="751 267 1201 354">• Information that you enter in a graphical user interface, at a command line, or as program text<li data-bbox="751 366 1040 392">• Sample program fragments<li data-bbox="751 404 1020 430">• 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.

Introduction

Portal Interface is the graphical user interface (GUI) for Sybase Enterprise Portal.

Topic	Page
Features	1
Tools and functions	2
Portlets	3
Security	3

Note This guide is for both Enterprise Portal – Information Edition users and Unwired Accelerator users. The term portlet is synonymous with the term application.

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
- Unwired Accelerator:
 - M-Business – create applications to deploy through M-Business Anywhere
 - Alerts – automate application functionality through alerts

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.
- 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 – allows you to navigate Portal Interface. The primary navigation controls are located at the top of the page and include:
 - MyInfo – click to manage your profile and account information. See “Maintaining your account with My Info” on page 7. The secondary navigation controls include:
 - MyInfo
 - Personalize
 - Alerts (if you have an Unwired Accelerator license)
 - M-Business (if you have an Unwired Accelerator license)
 - Proxy server (if you are using a proxy server)
 - Add Page – click to add a new page. See “Adding pages” on page 17.
 - Manage Pages – click to manage your pages. See “Managing pages” on page 15.
 - Help – click to display a list of help topics.
 - Log Out – click to log out of Portal Interface.

The secondary navigation controls are located below the primary navigation tabs and include:

- Change Layout
- Add Portlet
- Create Portlet
- Share Page
- Delete Page
- Refresh Page
- Portlets – display the contents you have selected from Portal Interface or the Web.

- Drop-down list of page groups – located to the right of Refresh Page on the secondary navigation control. From the drop-down list, you can select the page group you want to display.

Portlets

Note This guide is for both Enterprise Portal – Information Edition users and Unwired Accelerator users. The term portlet is synonymous with the term application.

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.

Security

Enterprise Portal access is password protected. For information about the security procedures used in Enterprise Portal, see the *Feature Guide*.

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

Topic	Page
Accessing Portal Interface	5
Logging in to Portal Interface	6
Maintaining your account with My Info	7

Accessing Portal Interface

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

```
http://hostname.portaldomain:port/onepage/index.jsp
```

For example, if your machine name is "mymachine," your portal domain is "sybase.com," and the port number used to access the portal is "4040," enter:

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

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

Accessing portal interface through mobile applications

Note This functionality is available only if you have purchased the Unwired Accelerator (UA) license. Contact your Sybase sales representative or customer service about obtaining a license for UA.

Unwired Accelerator provides a full mobile portal solution accessible from online (connected) devices, including SmartPhones, PDAs, and desktops. Development and deployment for offline (disconnected) solutions is provided by integration with M-Business Anywhere Server 5.5. You can use disconnected mobile applications from platforms on which the M-Business Anywhere 5.5 client is available, which includes PocketPClike devices running Windows CE 2003, Palm V (PalmOne) based devices, and Symbian IUQ based devices (limited capability).

See the *Unwired Accelerator Feature Guide* for more information.

To access Portal Interface using your Smartphone or PDA device, enter the following URL in your device browser, substituting your portal's host, domain name, and port number.

```
http://hostname.portaldomain:port/onepage/mpindex.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.

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.

Note If Join Now does not appear on the page, contact the portal administrator.

❖ **Creating your account**

After you click Join Now, you see the self-registration page.

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. You cannot make changes to the default page group. To personalize Portal Interface by adding pages and portlets of your own, you must first add a new page group. See “Adding page groups” on page 13.

If you are accessing Portal Interface using a mobile application, only the page groups, pages, and applications that are selected to support the navigation of the requesting device are display. 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 with My Info

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

The Personalize tab on the My Info page lists personalization keys. Personalization keys allow developers to create portlet input fields. For example, a developer creates a weather portlet where users enter a postal code or select from a list of postal codes. This allows the user to automatically see the weather for the area they have specified.

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 2-1.

Figure 2-1: Personalize

The screenshot shows a window titled "Personalize" with a sub-header "Personalize Information". In the top right corner, there are "Done" and "Cancel" buttons. Below the header is a table with five columns: Key, Value, Type, Permission, and Description. The table contains three rows of data. The third row has an input field for the "Value" column.

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	<input type="text" value="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 cannot be edited if the Permission field is “Read Only.”
- Type – indicates the type of the value field:
 - 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 separated 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.

Alert

Note The Alert tab displays on the MyInfo page only if you have purchased the Unwired Accelerator (UA) license. Contact your Sybase sales representative or customer service about obtaining a license for UA.

Use the Alert tab to create user notifications based on an application's conditions. For example, an e-mail alert can be sent when the price of a specific stock reaches a specified value. Alerts are saved based on your member name.

Portal alerts require you to use Portal Interface with Internet Explorer 5.5 or 6.0. Netscape support is not currently available. See "Setting up alerts" on page 30.

M-Business

Note The M-Business tab displays only if you have purchased the Unwired Accelerator (UA) license. Contact your Sybase sales representative or customer service about obtaining a license for UA.

Use the M-Business tab to access public and group channels, as well as create your own personal channels. A channel lets you view a Web page offline. For example, you can view Web pages on your PDA or SmartPhone when you do not have a network or Internet connection. You can specify how much content you want, such as a page, or a page and all its links, and choose how you want to update that content on your computer.

❖ Creating personal channels

- 1 Log in to Portal Interface with your member name and password. See "Accessing portal interface through mobile applications" on page 5.
- 2 Click MyInfo at the top of the page, then select the M-Business tab.
- 3 The M-Business Channel window displays. This lists personal channels, public channels, and group channels. You can edit, add, or delete personal channels, but not public or group channels.

Click Create Personal Channel.

- 4 The Edit Personal Channel window displays.

Figure 2-2: Edit Personal Channel window

Edit Personal Channel

Done Cancel

Title:

Location:

Channel Size Limit: KB

Link Depth:

Include Images:

Color Depth:

Follow Offsite Links:

Refresh: Only Once
 Every sync
 Only once every hour(s) only on weekdays
 Daily
 : AM PM
on days
 Monday Tuesday Wednesday Thursday
 Friday Saturday Sunday

Enter:

- Title – name of your new channel. This field is required.
- Location – URL of the channel content. This field is required.
- Channel Size Limit (KB) – maximum size in kilobytes (KB) that the entire channel can consume.
- Link Depth – how many levels of hypertext links to move through when downloading channel content to the device.
- Include Images – include images from the Web page.
- Color Depth – the number of colors that can be displayed on a pixel.
- Follow Offsite Links – allow following of offsite links.
- Refresh – select from these options:
 - Only Once

- Every sync – refreshes every time you sync your PDA with your PC.
 - Only Once Every __hours – select the “only on” box to specify only on weekdays.
 - Daily – choose the time from the drop-down list and select either AM or PM.
 - On Days – select the box next to the day you want to refresh.
- 5 Click Done to save the channel.
- Click Cancel to return to the originating window without saving the channel.

Proxy server

If you use a proxy server, you see the Proxy Server tab. A proxy server 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.

❖ **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.

Creating and Using Page Groups and Pages

You can create new page groups and 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.

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.

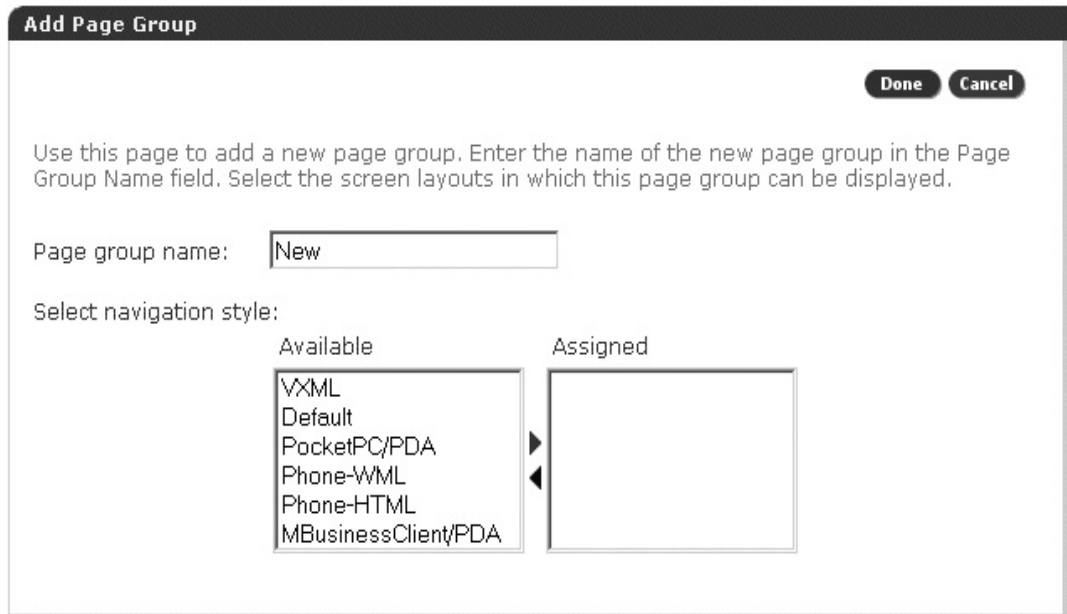
❖ Creating new page groups

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



- 4 Optionally, you can select navigation styles. The navigation style allows you to specify how to navigate pages based on your operating system and browser. Navigation styles are assigned to page groups objects. Page groups can have more than one Navigation style assigned to them.

If you do not select a navigation style, the default is used. The navigation styles are:

- VXML – voice XML support.
- Default – full HTML and frame support (desktop browsers).
- PocketPC/PDA – HTML with frames, like Pocket IE on PocketPC 2003.
- PhoneWML – phones with WML browser.
- PhoneHTML – phones with HTML browser.
- MBusinessClient/PDA – HTML with no frames, like the M-Business Anywhere Client.

The list of available navigation styles varies based on what the portal administrator set up in Web Studio.

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. You can change the name of the page by editing the page. See “Changing the page name” on page 18.

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 “Adding pages” on page 17, and “Adding portlets to pages” on page 23.

Managing pages

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

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

❖ **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 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 Remove a navigation style by clicking the left arrow to move it out of the Assigned list.

- c 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.
- Click Cancel to return to Manage Pages.

❖ **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. Click OK.

Click Cancel to cancel the deletion and return to the Manage Pages window.

- 3 When you complete the deletions, click Done.

❖ **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.

Adding pages

There are four types of pages used by Portal Interface.

Note Default pages, catalog pages, and guest pages are created in Web 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 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 Web Studio. You can add catalog (premade) 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 change guest pages.
- **User pages** – personal pages created by a user in Portal Interface. User pages do not display in Web 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. You must create page groups before you can add pages.

❖ **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.

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.

❖ **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 must assign the page a new name. Pages must have unique names within the page group.

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.

❖ **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.

You can also delete pages using the Manage Pages window. See “Deleting page groups or pages” on page 16.

Changing the page layout

You can rename pages, change the column layout of pages, or change the order of the portlets on a page. See “Adding portlets to pages” on page 23.

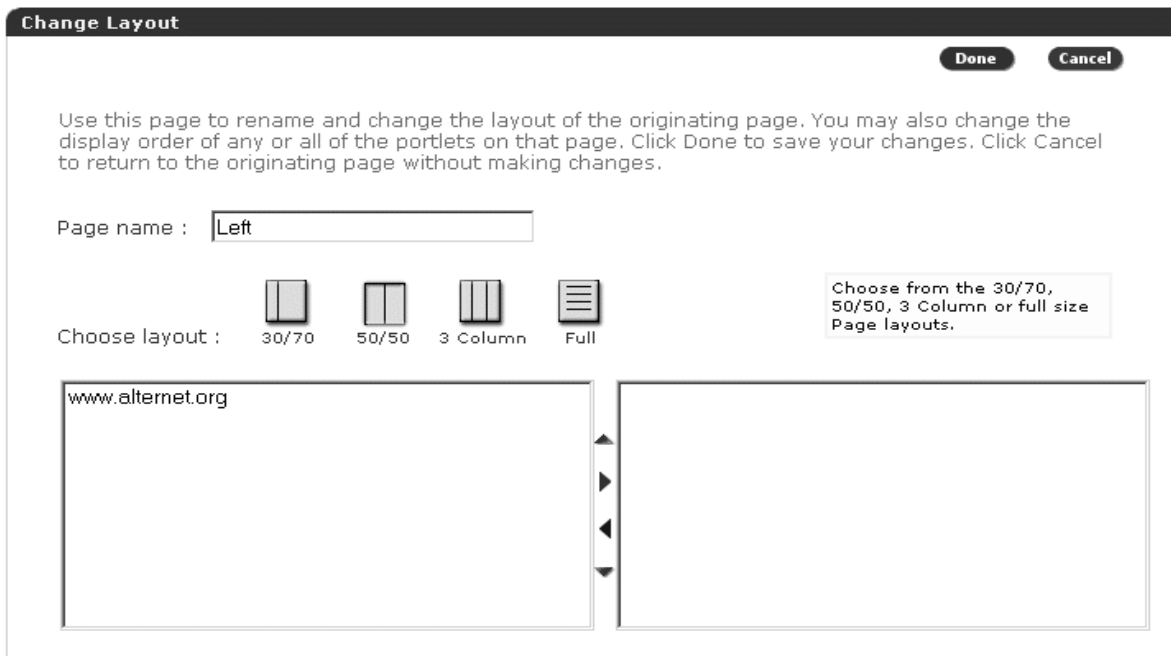
Note The way the portlets display on the pages is based on your roles. You cannot make changes to the layout of the default pages.

❖ **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 existing page.
- 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 window

- 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 three-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. All three columns must add up to 100%.

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 Web 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.
- ❖ **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 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.

When sharing user pages:

- Users can share user pages across portal installations that use the same portal database. Users are grouped under resources. Each resource corresponds to a portal. Portals can represent companies, divisions, departments, and so on. 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.

❖ **Sending a page**

- 1 Select the page to share and click “Share Page” on the secondary navigation control in Portal Interface.
- 2 Enter:
 - To – the e-mail address of the recipient of the shared page.
 - From – your e-mail address displays by default.
 - Subject – filled in automatically and is read-only.
 - Message – enter any message to send to the recipient along with the page.

Click Send.

- 3 In the confirmation window, click OK.

❖ **Accepting a shared page**

- 1 When you receive an e-mail message indicating that another user is sharing a page with you, click the link provided in the e-mail message for the shared page.
- 2 The portal displays. In the Sign In & Save Share Page, enter:

- Member name – your user name.
- Password – your password.
- Resource – select the resource from the drop-down list.

Figure 3-3: Accepting a shared page

Sign In & Save Share Page

An existing portal account is required to add this shared page. If you don't already have an account please [Join now](#) then use the link in your share page email to return here and sign in.

Member name:

Password:

Resource:

Click Sign In.

- 3 The shared page displays. You can click either:
 - Accept – the page is added to the shared page group.
 - Decline – if you decline the shared page, you return to your default portal page.

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. A single page can contain multiple portlets.

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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 add portlets only to your personal pages. You cannot add portlets to the default pages or premade catalog 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 predefined portlets are listed beneath the subcategory.

For example, there might be a category called “Search.” Click “Search” to see a list of subcategories, such as “Google.” Click any of the subcategories to see a list of available portlets.

❖ **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.

❖ **Creating portlets from the Web**

- 1 Click Create Portlet from the toolbar.
- 2 In the Create Portlet, Step 1 of 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 damages. Each developer and user is responsible for compliance with applicable law in the use and reproduction of copyrighted content.

- 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 can be selected because of the way a site constructs its pages. You can tell if an object can be selected by looking for the box next to your cursor to turn from orange to yellow.

When the box turns to yellow, and you see “Select it,” left-click the object to select it.

Figure 4-1: Creating a portlet step 2



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.

- 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



- 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.

❖ **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.

❖ **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 window, 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.

❖ **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 whose height you want to change.
- 2 From Set Default Height drop-down list, select the height at which you want the portlet to display. The available 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:

- Add New – see “Customizing portlet height” on page 29.
- Small
- Medium
- Large
- Full page
- one and a half
- Two pages
- Show all (default)

The non-iFrame option has these heights available:

- Add New – see “Customizing portlet height” on page 29.
- Small
- Medium
- Large
- Show all (default)

❖ **Customizing portlet height**

You can customize the height of any portlet that can be edited; that is, portlets that display an Edit link in their title bar.

- 1 Click “edit” in the title bar of the portlet for which you want to change the height.
- 2 In the Edit Portlet window, under Set Default Height, select Add New.
- 3 In the Pixel field that displays, enter the numeric value, in pixels, of the desired height for the portlet; for example, 300.
- 4 Click Done. The portlet displays with the new height.

❖ **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.

❖ **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.

You can also move portlets to pages in different page groups.

- 3 Click Done.

Setting up alerts

Note Portal alerts require you to use Portal Interface with Internet Explorer 5.5 or 6.0. Netscape support is not currently available.

Alerts allow you to easily capture, process, and save the application content to some type of adapter at a scheduled event. You can set up alerts on applications that display the “!” in the application title bar. For example, you can set up an alert to send an automatic e-mail to you when new information is added to the application.

Alerts have two attributes – rules and schedule. Rules are set up on applications to determine what content from the application triggers an alert. The schedule determines the interval at which the alert checks the application content.

❖ Setting rules for the alert

- 1 Click the Alerts icon (!) in the application title bar. The Alert window launches.

Note The alerts icon (!) only displays in the title bar of applications if the alerts functionality has been set up in Web Studio. Contact your portal administrator for information.

Figure 4-3: Alert window

Alert

Name: Playback Done Cancel

Rule Data:

Description:

Preview Source

123

Rules Summary

The rule will be applied to the content of the '123' portlet.

The rule will execute this agent when 'content' equals (number) '123'

Rules

Rule relationship: and or Select fields by: label position
 xpath (from each 'Record')

Execute agent when 'content' equals (number) '123'

Execute agent when

- 2 In the Alert window, enter:
 - Name – from the drop-down list, select Playback to display the application as it previews. Select XML to display the application as XML.
 - Rule Data – the text that should appear as the subject for the e-mail message.
 - Description – this is optional. Enter a description of the rule.
 - Preview Source – displays the source data automatically. This is read-only.
 - Rules Summary – shows the rule in text format. This is read-only.
 - Rules – select:

- Rule Relationship – select either AND or OR. Use these operators to specify what terms must appear in the selected application’s content.
- Select Fields By – select:
 - Label – uses column labels in the data. When table fields reorder, the rule still picks up the correct field.
 - Position – indexes on position in the data
 - XPath – allows for all matches to be done via XPath expressions. XPath is a set of syntax rules for defining parts of an XML document.
- Execute Agent When – from the drop-down lists, select the criteria for executing the agent. The rules operators are:
 - Equals – enter a numeric value. This converts the application data into floating point numbers for the equals comparison.
 - Is Greater Than – enter a numeric value. This converts the application data into floating point numbers for the greater-than comparison. If the data is not numeric, the expression returns false. The application data must be greater than the value supplied in the Rules text field.
 - Is Less Than – enter a numeric value. This converts the application data into floating point numbers for the less-than comparison. If the data is not numeric, the expression returns false. The application data must be less than the value supplied in the Rules text field.
 - Equals – takes the application data as text and compares the data to the text supplied in the Rules text field. If they are equal, the expression returns true.
 - Contains – takes the application data as text and returns true if the text data contains the string supplied in the Rules text field
 - Starts With – takes the application data as text and returns true if the text data starts with the string supplied in the Rules text field.
 - Ends With – takes the application data as text and returns true if the text data ends with the string supplied in the Rules text field.

- **Matches RegExp** – takes the application data as text and returns true if the text data matches the regular expression supplied in the Rules text field.
- **Contains Data** – checks the application data to see if the application contains any data (has a size > 0). The Rules text field is disabled for this option.
- **Contains No Data** – this is the opposite of “contains data.” This checks the application data to see if the application contains no data (has a size = 0). The Rules text field is disabled for this option.
- **Is Found** – this option is mostly designed to be used with XPath. This expression returns true if the XPath expression resolves to a XML node or attribute.
- **Is Not Found** – this is the opposite of “is found.” This option is mostly designed to be used with XPath. This expression returns true if the XPath expression does not resolve to a XML node or attribute.

For example, if you select “content” from the first drop-down list and “contains” from the second drop-down list, then enter `Hello` in the input field, this means, the rule matches content that contains the string “Hello.”

Click the plus sign (+) to add the rule. To add multiple rules, enter each rule in the Execute Agent When input field, click on the plus sign (+), then click Done to save all of them.

- 3 Click Done to save the alert rules.

Click Cancel to return to the originating window without saving the rules.

- 4 After saving the alert rules, you must set the schedule for it. See “Setting the schedule for the alert” below.

❖ **Setting the schedule for the alert**

- 1 Click MyInfo at the top of the window, then click Alert.
- 2 In the Alert window, select Trigger Based On Schedule, then:
 - **Time** – select the start time for the alert.
 - **Recurrence** – select how often the alert should occur.
 - **Range** – select the start date and end date, or select No End Date if you want to schedule the alert indefinitely.

- Send Alerts To – select either:
 - E-mail – enter the e-mail address to send the alert to.
 - SMS – from the drop-down list, select the wireless carrier.
- 3 Click Start, then Done.
- Click Stop to stop an alert.

Deleting portlets

You can delete portlets from your page by clicking the delete icon(X) 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 23.

To move the portlet to another page, use the Edit link. See “Moving portlets to different pages” on page 29.

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