

SeeBeyond ICAN Suite

ePortal Composer Installation and Channel Administration Guide

Release 5.0.1



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Introduction

ePortal Composer (ePortal), SeeBeyond's Web portal application program, provides a rich set of Web-based tools, which enable the Web developer/administrator to create Web portals that unify business information and personalize the portal experience based on the user's profile.

Through a Web portlet, called a channel, ePortal enables users to simultaneously view multiple eVision applications, other ICAN-generated GUIs, and specified Web-enabled enterprise content.

1.0.1 Document purpose and scope

The *ePortal Composer Installation and Channel Administration Guide* explains how to install, setup, and use ePortal to create, manage, and personalize Web channels. This document assumes that you have installed the SeeBeyond eVision Studio application and that all the required software dependencies, such as SeeBeyond Integration Server, are installed and in the required locations on a designated server.

1.1 Intended Audience

This guide is intended for experienced PC users who have the responsibility of helping to set up and maintain a fully functioning ICAN Suite system. This person must also understand any operating systems on which eGate will be installed (Windows or UNIX) and must be thoroughly familiar with Windows-style GUI operations.

1.2 Organization of information

The *ePortal Composer Channel Administration Guide* provides the following information:

- Hardware, software, and database requirements
- Installation instructions for a variety of operating systems
- An overview of ePortal's application architecture
- A description of ePortal's features
- How to use the ePortal Composer Web console to create and administer channels

1.3 Writing Conventions

The following writing conventions are observed throughout this document.

Table 1 Writing Conventions

Text	Convention	Example
Button, file, icon, parameter, variable, method, menu, and object names.	Bold text	<ul style="list-style-type: none">▪ Click OK to save and close.▪ From the File menu, select Exit.▪ Select the logicalhost.exe file.▪ Enter the timeout value.▪ Use the getClassname() method.▪ Configure the Inbound File eWay.
Command line arguments and code samples	Fixed font. Variables are shown in <i>bold italic</i> .	<code>bootstrap -p <i>password</i></code>
Hypertext links	Blue text	For more information, see “Writing Conventions” on page 10.

Additional Conventions

Windows Systems

For the purposes of this guide, references to “Windows” will apply to Microsoft Windows Server 2003, Windows XP, and Windows 2000.

Path Name Separator

This guide uses the backslash (“\”) as the separator within path names. If you are working on a UNIX system, please make the appropriate substitutions.

1.4 Online Documentation

The documentation for the SeeBeyond ICAN Suite is distributed as a collection of online documents. These documents are viewable with the Acrobat Reader application from Adobe Systems. Acrobat Reader can be downloaded from:

<http://www.adobe.com>

Note: When downloading Acrobat Reader, make sure to download the version that includes the option for searching .pdf files—Acrobat Reader with Search. This version is required to view the searchable master index.

1.5 The SeeBeyond Web Site

The SeeBeyond Web site is your best source for up-to-the-minute product news and technical support information. The site's URL is:

<http://www.seebeyond.com>

About ePortal Composer

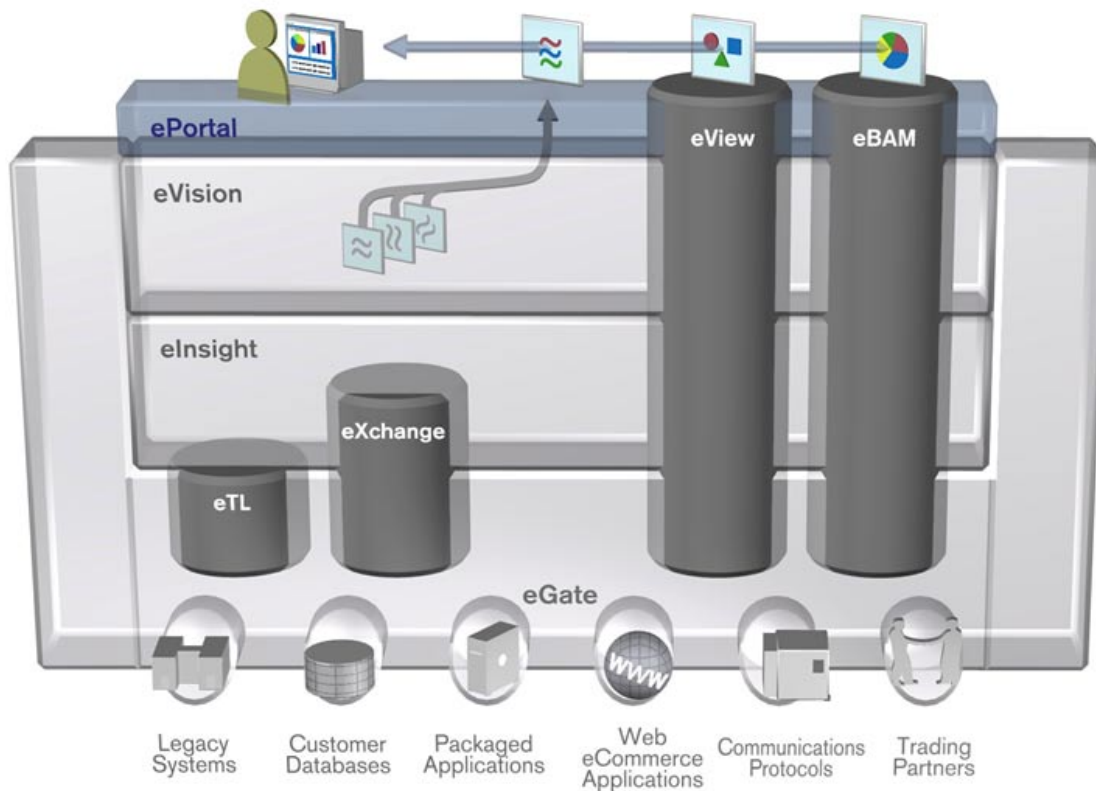
This chapter provides an overview of ePortal.

2.1 About Portals

ePortal Composer leverages the ICAN Suite by enabling enterprise-wide access to business processes from a single point of entry: a portal. A portal is a Web site that serves as a gateway for Web-based services and applications. A portal allows the organization to present a single, unified view of enterprise data and applications to employees, customers, and partners. Multiple URLs can be assigned to *channels*, which are aggregated within the portal and then collectively presented to users.

With ePortal Composer, administrators can create personalized channels with targeted views of business information. For example, a channel allows the user to log into a system, review and complete assigned tasks, and monitor the progress of business activities. Through channels, users can interact with running business processes, while working with only the information that they need to see. In the ICAN Suite, business processes can be monitored in real-time with Enterprise Manager, and eVision Web applications can be executed, both within their individual channels. How ePortal Composer is integrated within the ICAN Suite shown in [Figure 1 on page 13](#).

Figure 1 ePortal Composer Within the ICAN Suite



2.1.1 About Channels

ePortal Composer allows administrator-level personnel to create, manage, personalize, and publish channels. With ePortal Composer, administrators can create visually appealing Web connections to eVision applications, allowing users to perform real-time interaction with SeeBeyond ICAN Suite run-time assets, or with any other URL or Web application.

Channels are assigned to channel *categories*. A category is a collection of channels that logically belong together; for example, channels that have a related purpose or dependency should be assigned to the same category.

Authentication

ePortal Composer enables authentication of user IDs and passwords at login. User attributes such as login ID, password (credential), and properties such as first and last names, e-mail address, and other user profile information are maintained in a persistent data storage area.

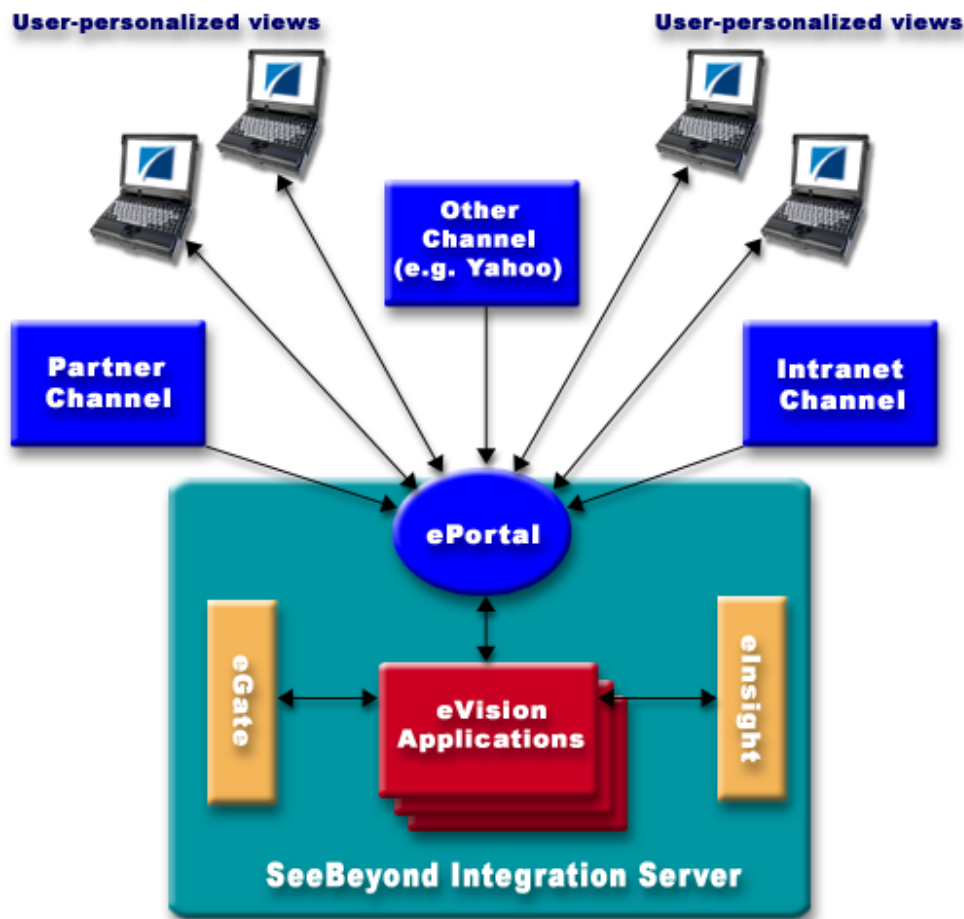
Personalization

Users are allowed personalization privileges, which enables them to specify the channels that they want to see in a channel layout; however, administrators can restrict

access to the personalization tools so that only administration-level personnel can create channel layouts and configure channel options.

Portals may comprise several URLs and Web applications—“portlets” with personalized content called *channels*—which are presented within a single, familiar Web interface. See Figure 2.

Figure 2 Personalized Channels



Web-based Portal Administration and Management

Under categories, administrators can orchestrate channel access using the groups, users, and roles defined in the Enterprise Designer.

ePortal Composer provides Web-based wizards that guide the administrator through the process of channel configuration and management; for example:

- The channel administrator creates channels to be made accessible in the portal. (A channel can access content from any available URL source.)
- The administrator assigns the channel to a category.

ePortal Composer supports any combination of URLs, and simplifies the end-user's access to application resources, Web content, workflow, e-mail, content management systems, and packaged applications such as ERP and CRM.

Installing ePortal Composer

This chapter describes how to install ePortal Composer and the supporting run-time components on the Windows and UNIX operating systems.

ePortal supports the following:

- Windows 2000 and XP
- Solaris 8 and 9
- AIX 5.0 and 5.1
- HP/UX 11, 11i and TRU64 5.1a
- Red Hat Linux 8
- Red Hat Linux Advanced Server 2.1

This Chapter Includes

- [“Prerequisites for Windows and UNIX”](#)
- [“Installing ePortal Composer on Windows” on page 17](#)
- [“Installing ePortal Composer on UNIX” on page 27](#)

3.1 Prerequisites for Windows and UNIX

The following is a list of the application, configuration, and run-time components that are required for the ePortal installation.

Web Server

ePortal must be installed on a Logical Host that is running on a SeeBeyond Integration Server.

Note: *To install ePortal on a Logical Host that is running on a SeeBeyond Integration Server, your site must have a full installation of eGate Integrator.*

Application Components

- An installed license for eGate Integrator and ePortal Composer
- **ePortal.war** (the ePortal application Web archive file)

- **search.war** (the ePortal search facility Web archive file)
- **eportal.properties** (the configuration file for ePortal run-time properties)

3.1.1 Before you begin

Installing ePortal requires manual procedures on both the Windows and UNIX operating systems. For example:

- After downloading, the .war files must be manually dropped into the run-time environment.
- The application properties file must be edited using a text editor such as **Notepad** (Windows) or **vi** (UNIX).
- For Windows, an archive utility such as WinZip is required.

3.2 Installing ePortal Composer on Windows

This section describes how to install ePortal Composer on the Windows operating system.

3.2.1 Upload the ePortal.sar file

- 1 Start SeeBeyond Integration Server.
- 2 Start your browser.
- 3 To start **Enterprise Manager**, on the **Address** line, type:

http://<hostname>:<portnumber>

where:

hostname is the host name or the IP address of the server where you installed the Repository, not the name of the Repository itself, and

portnumber is the port number you specified when you installed the Repository.

Note: *The system must be able to resolve the host name to an IP address using DHCP or any other name resolution protocol.*

The **SeeBeyond Customer Login** window of the Enterprise Manager appears. Enterprise Manager serves as an update center, management center, and a dashboard to gain access to available applications.

- 4 Enter your **username** and **password** and click **Login**.

Note: *This is your ICAN administrator username and password, not your username and password. See the **Readme.txt** file for the username and password.*

- 5 Click the **ADMIN** tab to begin the process of selecting and uploading ePortal Composer files to the Repository.
- 6 On the **Upload Component Manifest** window, click **Browse**.
- 7 Navigate to the **ProductManifest.xml** file and select the file.
- 8 Click **Submit**.

The **Admin** page will reappear with a list of ICAN products extracted from the Products Manifest file.

- 9 Using the **Browse** button on the product list, browse to the **ePortal.sar** file.
- 10 Select the file.
- 11 Click **Upload Now**.
- 12 Wait until the progress bar stops.

3.2.2 Downloading and Extracting the ePortal Files

- 1 When the upload is finished, click the **DOWNLOADS** tab.
- 2 On the **DOWNLOADS** page, click **ePortal**.
- 3 Using an archive utility (for example, WinZip), save the archive (**ePortal.zip**) in a directory on your computer, for example, **c:\ePortal**.

Remember where you put the archive file.

- 4 Close the Enterprise Manager.
- 5 Explore to the directory containing the **ePortal.zip** archive file.
- 6 Using the archive utility to create the directory, extract the contents of the **ePortal.zip** file to a folder on your computer, for example:

c:\ePortal

- 7 The extraction process will create a subdirectory named ePortal and load the following ePortal components into it:

- **search.war**
- **ePortal.war**
- **README.txt**
- **eportal.properties**

3.2.3 Creating Users

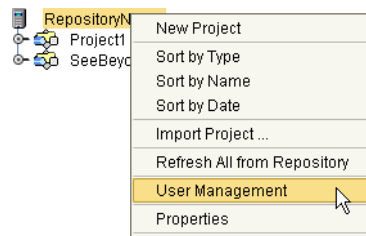
The ePortal run-time environment requires that you initially define two users: **guest** and **template**. These users will provide the initial channel profiles at login.

All other user and role management tasks are done in the Enterprise Designer. ePortal regularly polls the user database in Enterprise Designer to add or remove users and add, remove, or modify roles according to the current status.

To Create the Required Users

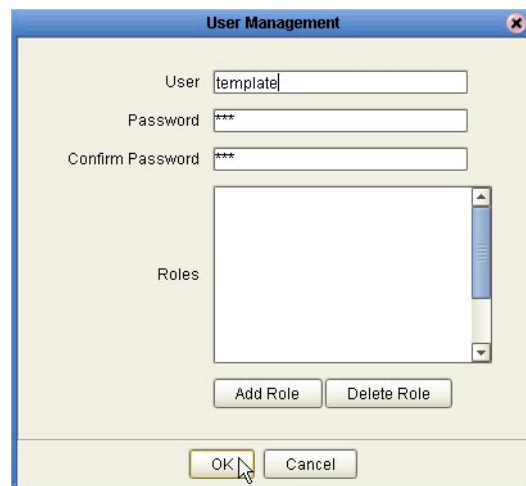
- 1 Start the **Enterprise Designer**.
- 2 At the bottom of the Enterprise Designer window, click the **Project Explorer** tab.
- 3 In the Enterprise Explorer window, right-click the **Repository** icon.
- 4 On the context menu, click **User Management**. See Figure 3.

Figure 3 User Management Context Menu



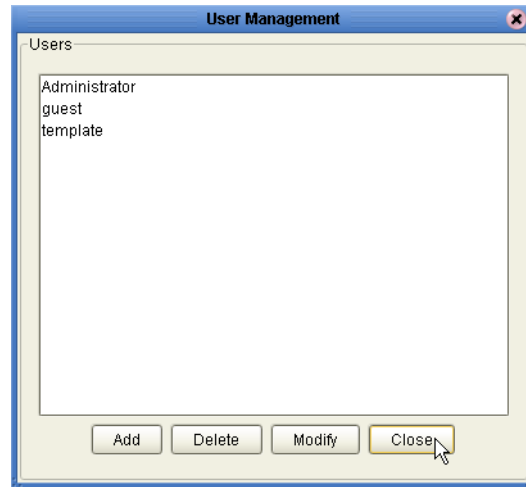
- 5 On the **User Management** dialog box, click **Add**. See Figure 4.

Figure 4 Adding Users in Enterprise Designer



- 6 In the **User** box, type **template**.
- 7 In the **Password** box, type a password (for example **STC**), and then confirm the password.
- 8 On the **User Management** dialog box, click **OK**.
The **template** user will be added to the list of users.
- 9 Repeat the procedure to add a user named **guest**.
- 10 On the **User Management** dialog box, click **OK**, and then click **Close**. See [Figure 5 on page 20](#).

Figure 5 Adding the Guest and Template Users



3.2.4 Creating the Run-time Environment

To run the ePortal application, you need a run-time environment containing a SeeBeyond Integration Server. A deployment profile is not required.

In this procedure, you will create the run-time environment, which consists of:

- A Logical Host (the run-time platform)
- An Integration Server (provides application run-time services)

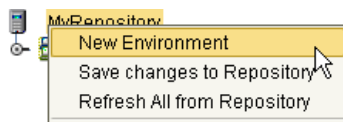
ePortal does not require a Deployment Profile.

To Create the Environment

- 1 In the Enterprise Designer, click the **Environment Explorer** tab.
- 2 In the Enterprise Explorer, right-click the **Repository** icon and on the context menu, select **New Environment**.

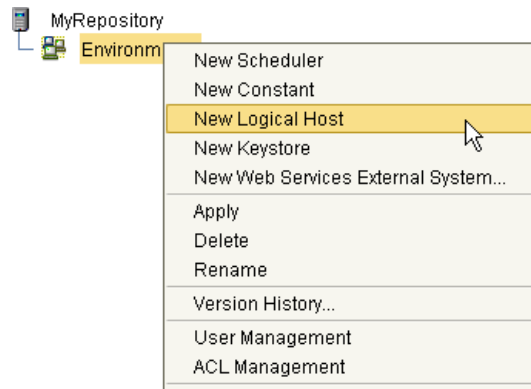
The **Environment** name defaults to **Environment1**. You can accept the default name. See Figure 6.

Figure 6 Creating a New Environment



- 3 Right-click the new **Environment**, and on the context menu, select **New Logical Host**. See [Figure 7 on page 21](#).

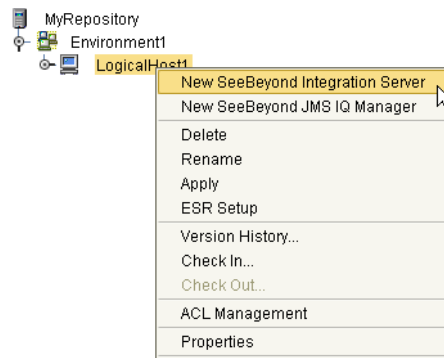
Figure 7 Creating a New Logical Host



The **Logical Host** name defaults to **LogicalHost1**. You can accept the default name.

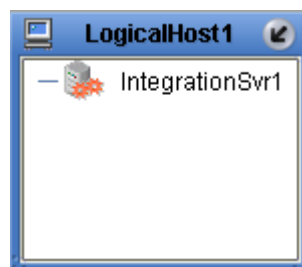
- 4 Right-click the **Logical Host** and on the context menu, select **New SeeBeyond Integration Server**. See Figure 8.

Figure 8 Creating a New Integration Server



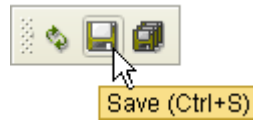
The **Integration Server** name defaults to **IntegrationSvr1**. You can accept the default name. See Figure 9.

Figure 9 Adding the Integration Server to the Logical Host



- 5 On the Enterprise Designer toolbar, click **Save**. See [Figure 10 on page 22](#)

Figure 10 Saving the ePortal Environment



3.2.5 Starting the Logical Host on Windows

You start the Logical Host by opening a **Command Prompt** and typing a command on the command line which includes a string of required, optional, and initial (first-time only) command line arguments appended to the startup command. The startup command string uses the following syntax:

```
<path>\logicalhost\bootstrap\bin\bootstrap <arguments>
```

For example, the command

```
c:\ican50\logicalhost\bootstrap\bin\bootstrap -h
```

displays Help text that explains the command line arguments in detail.

Logical Host Startup Parameters

The startup command syntax is as follows:

```
bootstrap arguments
```

Table 2 Command Arguments for Bootstrap

Parameter	Description	Req/Opt
-d <i>debug</i>	Overrides bootstrap sequence. Displays all cached (default) argument values	Optional
-e <i>environment name</i>	The name of the Environment to which this Logical Host belongs.	Required (first time only)
-h <i>help</i>	Overrides bootstrap sequence. Displays the usage report.	Optional
-i <i>id</i>	The user ID used for accessing the Repository. Note that the user ID is the same as the username, and that the Administrator can set up more than one user ID.	Required (first time only)
-l <i>logicalhost name</i>	The name of this Logical Host.	Required (first time only)
-n <i>physical host name</i>	The name of this Physical Host.	Required (first time only)
-p <i>password</i>	The password used for accessing the Repository.	Required (first time only)

Table 2 Command Arguments for Bootstrap (Continued)

Parameter	Description	Req/Opt
<code>-r repository URL</code>	The root URL for the Repository containing the Logical Host data.	Required (first time only)

Note: *Required (first time only)* indicates that the argument is required the first time you start the Repository. You do not need to use it again unless you change the name of the Logical Host.

Before You Begin

Make sure that the Repository Server is running. The Logical Host will not start without a Repository Server.

To start the Logical Host

- 1 On your desktop, select **Start**, and point to **Run**.
- 2 In the **Run** dialog box, to open a **Command Prompt**, type **cmd**.
- 3 Change to the Logical Host **\bin** directory, for example:
c:\ican50\logicalhost\bootstrap\bin
- 4 To start the Logical Host *for the first time*:
On the **command line**, run the **bootstrap** command and include all of the required parameters described in **“Command Arguments for Bootstrap”** on page 22.
- 5 If you are starting the Logical Host at any time *after you have finished the installation*:
Using Windows, explore to **c:\ican50\logicalhost\bootstrap\bin**, and double-click **bootstrap.bat**.

3.2.6 Editing the ePortal Properties File

- 1 Explore to the folder where you installed the ePortal files.
- 2 Using a text editor, edit the **eportal.properties** file.
- 3 Locate the following lines:

```
repository_url=http://localhost:12000/RepositoryName
repository_logon_id=Administrator
repository_logon_password=STC
```
- 4 Do the following:
 - A On the **repository_url** line, change the **url** property to the URL and Repository that contain the users and roles to be used by ePortal.
 - B If necessary, on the **repository_logon_id** line, change the **Administrator** property to the login ID of the Repository administrator.
 - C If necessary, on the **repository_logon_password** line, change the **password** property to the logon ID of the Repository administrator.

This information is required to obtain the list of users and roles that are to be used for ePortal and to automatically poll Enterprise Designer for updates to the list.

- 5 Locate the following line:

```
internal_db_data_directory=/tmp/eportal
```

- 6 Using forward slashes, change `/tmp/eportal` to a directory name that reflects the content of that directory (internal database files), for example:

c:/ePortal/dbdata

- 7 Locate the following line:

```
internal_db_logon_password=
```

- 8 To login into the internal database if it is being used, append an appropriate password to this line, for example: **Admin**

- 9 Locate the following line:

```
indexing_data_directory=/tmp/index_data
```

- 10 Using forward slashes, change `/tmp/index_data` to a directory name that reflects the content of that directory (index and search engine files), for example:

c:/ePortal/index

- 11 Save the **eportal properties** file.

3.2.7 Deploying ePortal

To deploy the ePortal application files do the following:

- 1 Using Windows, copy the **eportal.properties** file to the Logical Host and drop it into the following directory:

```
< c:\ican50\logicalhost>\stcis\lib\endorsed
```

where:

c:\ican50\logicalhost is the drive and directory for the Logical Host.

- 2 Copy the **ePortal.war** and **search.war** files to the Logical Host deployment directory, for example:

```
< c:\ican50\logicalhost>\stcis\deploy\new\<servername>
```

where:

c:\ican50\logicalhost is the drive and directory for the Logical Host, and *servername* is the name of the Integration Server running on the Logical Host.

Note: *There can be more than one Integration Server running on the Logical Host. Make sure you explore to the specific Integration Server that you specified for ePortal Composer.*

- 3 Watch the `.war` files in the directory. If you completed all of the preceding steps correctly, the two files will disappear, one after the other. Depending on machine speed, this may take a few moments. When the files are no longer visible in the

<*servername*> directory, they have been deployed onto the Integration Server and ePortal Composer is ready to run.

3.2.8 Validating the Installation of ePortal Composer

This procedure verifies that the ePortal application, the Logical Host, and the ePortal database are all running, and confirms that ePortal Composer has been successfully installed.

- 1 Start your browser.
- 2 On the **Address** line, type the following URL:

http://<localhost>:<port>/ePortal/

where:

localhost is the name of the host machine, and

port is the port number assigned to the Integration Server on the Logical Host.

For example:

http://localhost:18003/ePortal/

In a successful installation, you will see the ePortal **login** screen.

- 3 On the **login** screen, log in as Administrator as follows:

username: **Administrator**

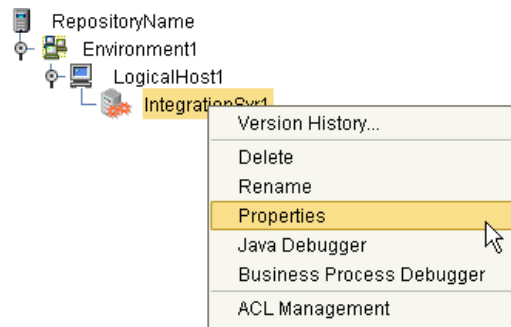
password: **STC**

Locating the Integration Server Port on the Logical Host

On the Logical Host, if **18003** is not the Integration Server port number that you are using, and you want to determine the correct port number, do the following:

- 1 Start **Enterprise Designer**.
- 2 In Environment Explorer, expand the **Environment** nodes as follows:
Repository > Environment > LogicalHost > IntegrationServer
- 3 Right-click the **Integration Server** icon.
- 4 On the context menu, click **Properties**. See [Figure 11 on page 26](#).

Figure 11 Integration Server Properties menu



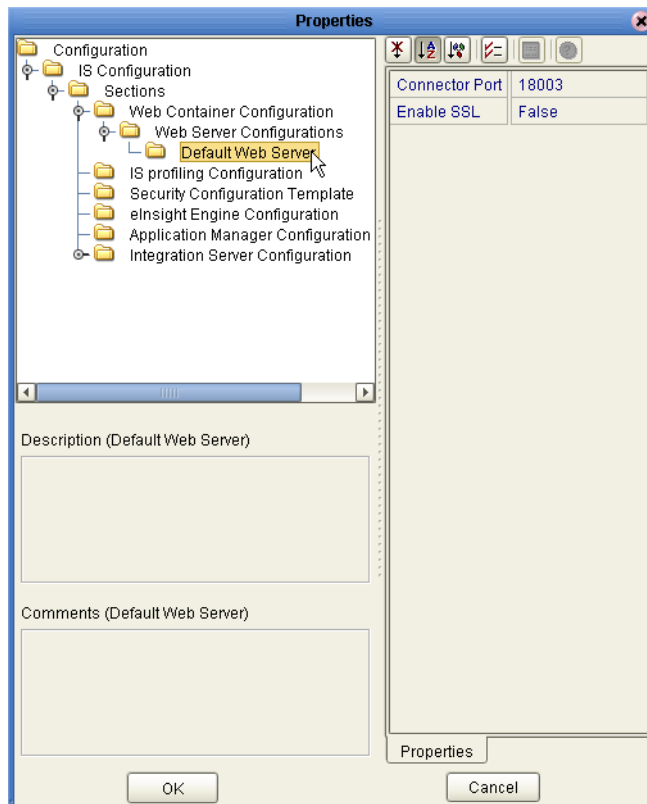
5 In the upper-left pane of the **Properties** dialog box, expand the **Configuration** nodes as follows:

Configuration > IS Configuration > Sections > Web Container Configurations

6 Click the **Default Web Server** folder.

In the right pane, the **Connector Port** number will be displayed (usually 18003). This is the number to use when you type the startup command in your browser to start ePortal. See Figure 12.

Figure 12 Web Server Properties: Port Number



3.2.9 Running ePortal After the Installation

To run ePortal Composer in subsequent sessions, do the following:

- 1 Start the Logical Host. See [“Starting the Logical Host” on page 28](#).
- 2 Log into ePortal. See [“Validating the Installation of ePortal Composer” on page 25](#).

Note: *Once the .war files have been deployed, you do not need to redeploy them to start the Logical Host.*

3.3 Installing ePortal Composer on UNIX

- 1 On your UNIX machine, change to the directory where you want the ePortal files to be reside.
- 2 To create a directory for the ePortal files, type the following command:

```
mkdir ePortal
```
- 3 On a Windows machine, download and extract the ePortal files. See [“Installing ePortal Composer on Windows” on page 17](#).
- 4 Using FTP or a shared file system, copy the following files into the **ePortal** directory on your UNIX machine:
 - **search.war**
 - **ePortal.war**
 - **README.txt**
 - **eportal.properties**

3.3.1 Editing the ePortal Properties File

- 1 Change to the directory where you installed the ePortal files.
- 2 Using a text editor, edit the **eportal.properties** file.
- 3 Locate the following lines:

```
repository_url=http://localhost:12000/RepositoryName  
repository_logon_id=Administrator  
repository_logon_password=STC
```
- 4 Do the following:
 - A On the **repository_url** line, change the **url** property to the URL and repository that contain the users and roles to be used by ePortal.
 - B If necessary, on the **repository_logon_id** line, change the **Administrator** property to the login ID of the Repository administrator.
 - C If necessary, on the **repository_logon_password** line, change the **password** property to the login ID of the Repository administrator.

This information is required to obtain the list of users and roles that are to be used for ePortal and to poll for updates to the list.

- 5 Locate the following line:

```
internal_db_data_directory=/tmp/eportal
```

- 6 Using forward slashes, change `/tmp/eportal` to a directory name that reflects the content of that directory (internal database files), for example:

```
/usr/ePortal/dbdata
```

- 7 Locate the following line:

```
indexing_data_directory=/tmp/index_data
```

- 8 Using forward slashes, change `/tmp/index_data` to a directory name that reflects the content of that directory (index and search engine files), for example:

```
/usr/ePortal/index
```

- 1 Save the `eportal.properties` file.

3.3.2 Starting the Logical Host

To start the Logical Host

- 1 Navigate to the `bootstrap/bin` directory in the location where you installed the Logical Host, for example:

```
cd /home/my_user_name/ican50/logicalhost/bootstrap/bin
```

- 2 Run the bootstrap script using the following command:

```
./bootstrap.sh arguments
```

See [Logical Host Startup Parameters](#) on page 22 for a complete list of the command-line arguments. *Remember that the Logical Host service will continue to run until you manually shut it down.*

- 3 Copy the `eportal.properties` file to the Logical Host and drop it into the following directory:

```
<logicalhost>/stcis/lib/endorsed
```

where:

logicalhost is the directory for the Logical Host.

- 4 Copy `ePortal.war` and `search.war` into your Logical Host deployment directory, for example:

```
<logicalhost>/stcis/deploy/new/<servername>
```

where:

logicalhost is directory for the Logical Host, and

servername is the name of the Integration Server running on the Logical Host.

Note: *There can be more than one Integration Server running on the Logical Host. Make sure you explore to the specific Integration Server that you specified for ePortal Composer.*

- 5 Watch the files in the directory. After a few moments, the files should disappear.

If you completed all of the preceding steps correctly, the two files will disappear, one after the other. When the files are no longer visible in the *<servername>* directory, they have been deployed onto the Integration Server and ePortal Composer is ready to run.

3.3.3 Validating the Installation

This procedure verifies that the ePortal application and the Logical Host, and the ePortal database are all running, and confirms that ePortal Composer has been successfully installed.

- 1 Start your browser.
- 2 On the **Address** line, type the following URL:

http://<hostname>:<port>/ePortal/

where:

hostname is the name of the host machine, and

port is the port number assigned to the Logical Host.

For example:

http://unix_server1:18003/ePortal/

In a successful installation, you will see ePortal **login** screen.

- 3 On the **login** screen, log in as Administrator as follows:
username: **Administrator**
password: **STC**

3.3.4 Running ePortal After the Installation

To run ePortal Composer in subsequent sessions, do the following:

- 1 Start the Logical Host. See **“Starting the Logical Host” on page 28**.
- 2 Log into ePortal. See **“Validating the Installation”**.

Portal Administration: Managing Channels

This chapter describes how to create and manage channels. A channel is SeeBeyond's equivalent of a portlet.

A channel is the mechanism through which Gate and eInsight data is aggregated and distributed. Many channels can be added to a single portal.

4.0.1 Before you Begin

Only ePortal server administrators are allowed to create, publish, and modify channels. The following procedures assume that you have ePortal server administrator privileges.

4.1 Publishing a New Channel

Using ePortal Composer to publish a new channel is described below.

Log into ePortal Composer

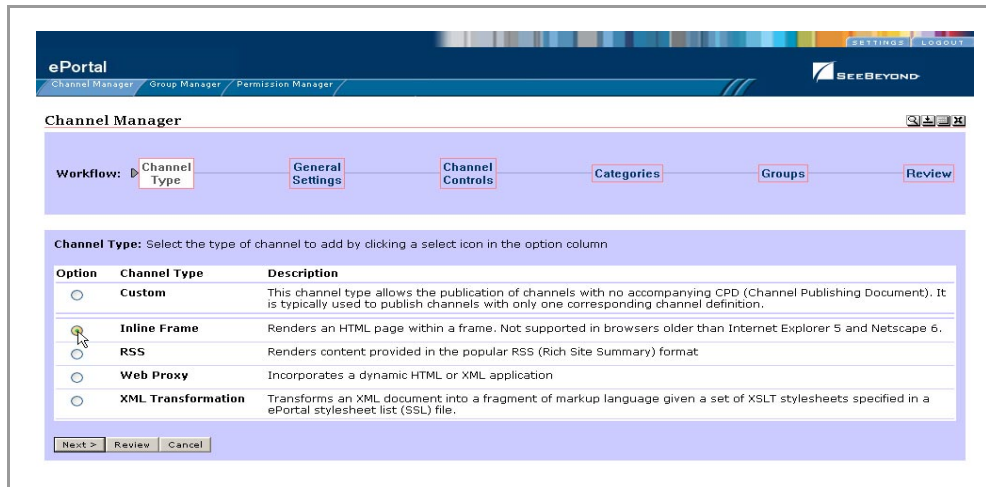
- 1 Start your Browser.
- 2 On the address line, type the URL for ePortal, for example:
http://localhost:18003/ePortal
- 3 On the **Login** page, type the administrator user name and password, for example:
 - Username = **Administrator**
 - Password = **STC**
- 4 Click **Login**.

The **ePortal Composer Administration** page opens. The **Channel Manager** tab is the default.

Publish a New Channel

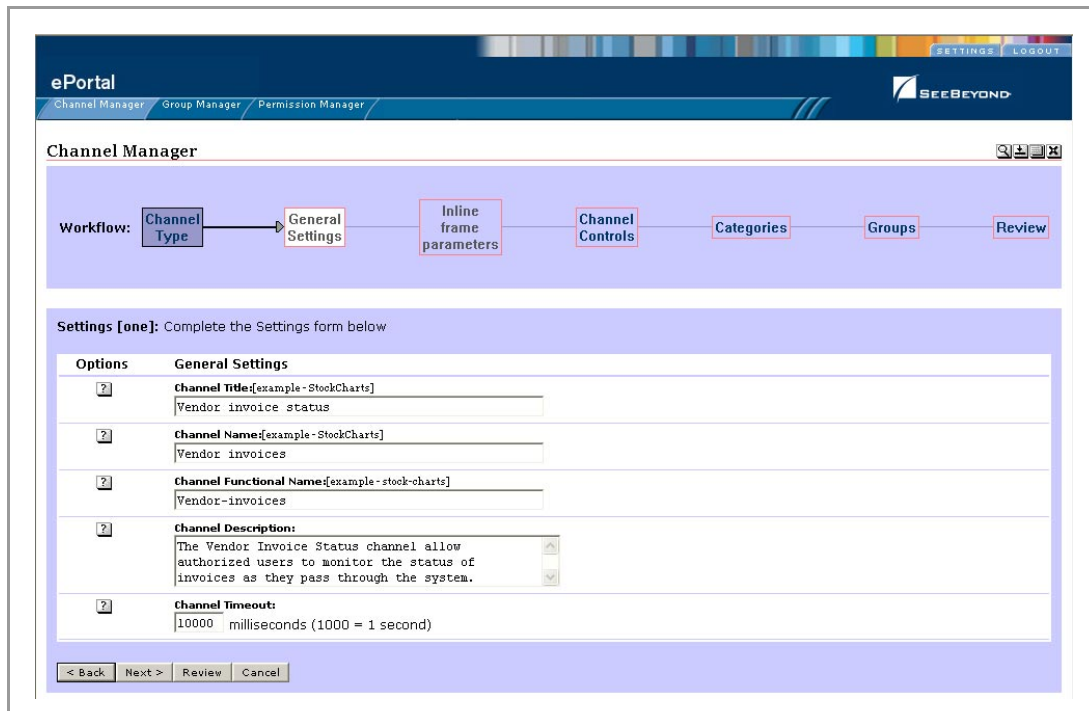
- 1 Under the **Options for Managing Channels** heading, click **Publish a new channel**.
- 2 In the **Channel Type** area, select a channel layout option, for example: **Inline Frame**. See [Figure 13 on page 31](#).

Figure 13 Publishing a channel



3 Click Next. See Figure 14.

Figure 14 Specifying an inline frame



- 4 In the **Settings** area, type the following information in the labeled fields.
- **Channel Title**— displayed when a user views the channel.
 - **Channel Name**—a logical name, which is displayed in the list of channels when you are personalizing (configuring) a channel’s layout and view for a particular user.

- **Channel Description**— a short overview of the channel’s purpose.
- **Channel Timeout**—the time-frame, in milliseconds, within which, channel response must be received during a web application query. When the set time elapses without a response, the channel is closed.

See Figure 15.

Figure 15 Specifying general channel settings

The screenshot shows the 'ePortal' interface with a navigation bar containing 'Channel Manager', 'Group Manager', and 'Permission Manager'. The main content area is titled 'Channel Manager' and features a workflow diagram with steps: Channel Type, General Settings, Inline frame parameters, Channel Controls, Categories, Groups, and Review. The 'General Settings' step is highlighted. Below the workflow, a 'Settings [one]: Complete the Settings form below' section contains a table with the following fields:

Options	General Settings
[?]	Channel Title {example - StockCharts} Vendor invoice status
[?]	Channel Name {example - StockCharts} Vendor invoices
[?]	Channel Functional Name {example - stock-charts} Vendor-invoices
[?]	Channel Description: The Vendor Invoice Status channel allow authorized users to monitor the status of invoices as they pass through the system.
[?]	Channel Timeout: 10000 milliseconds (1000 = 1 second)

At the bottom of the form are navigation buttons: '< Back', 'Next >', 'Review', and 'Cancel'.

- 5 Type in the desired information, and then click **Next**.
- 6 In the **Inline frame parameters** area, under the **General Settings** heading, in the **URL** field, type the URL for the page you want to display in the in-line frame.

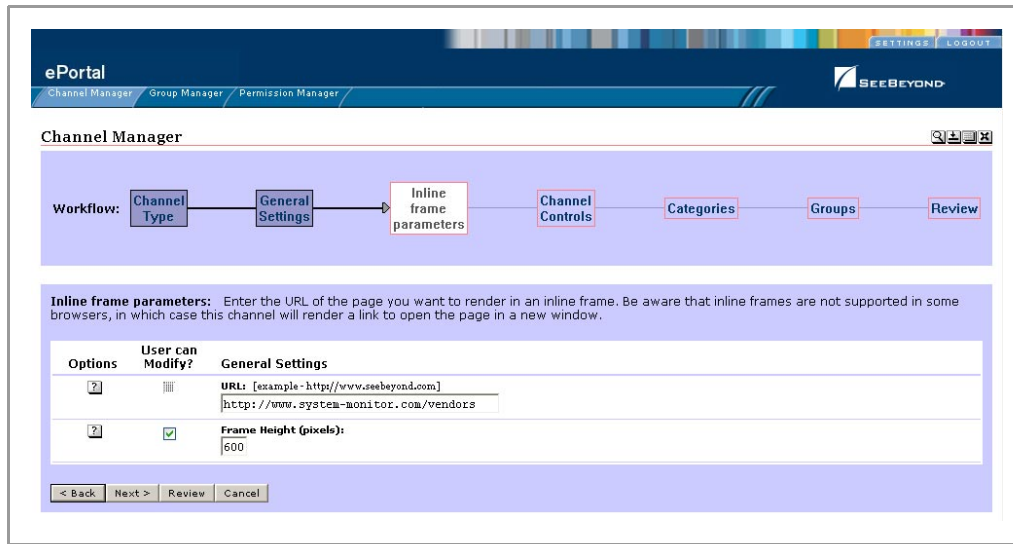
This is a key step. This is the Web application that you want the channel to present to users as a Web page. This step creates a link to that application.

Note: *In-line frames are not supported by some browsers. Lack of in-line frame support will cause the browser to open the page in a new window.*

- 7 In the **Frame Height** field, in pixels, type in a height value.
- This is the height constraint within which the channel will present the application’s Web interface to channel users.

See [Figure 16 on page 33](#).

Figure 16 Setting inline frame parameters



8 Click **Next**.

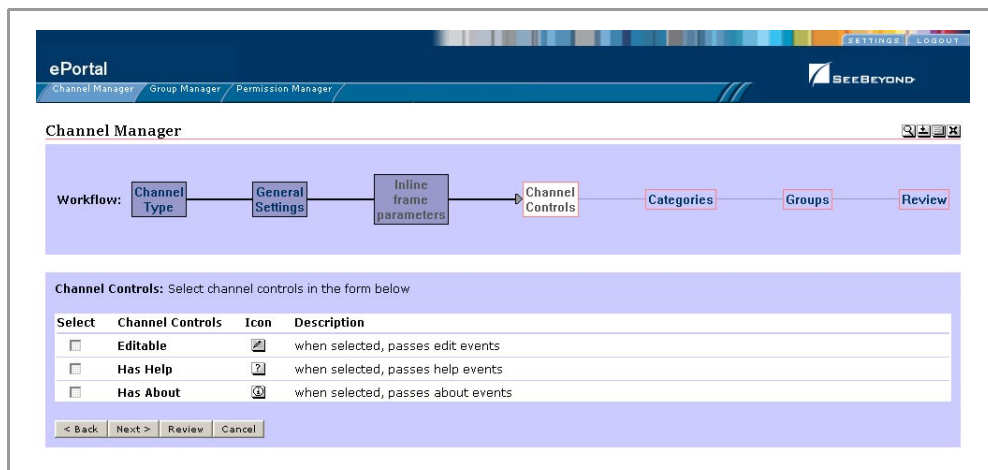
9 In the **Channel Controls** area, under the **Select** heading, select or clear the controls you want to add to the channel.

This maps Help and associated information to the control buttons (shown under the **Icon** heading) in the channel, and adds the buttons to the channel. For example:

- ◆ **Editable**—passes **edit** events to the application.
- ◆ **Has Help**—passes **help** events to the application.
- ◆ **Has About**—passes **about** events to the application.

See Figure 17.

Figure 17 Setting channel controls



10 When you are finished, click **Next**.

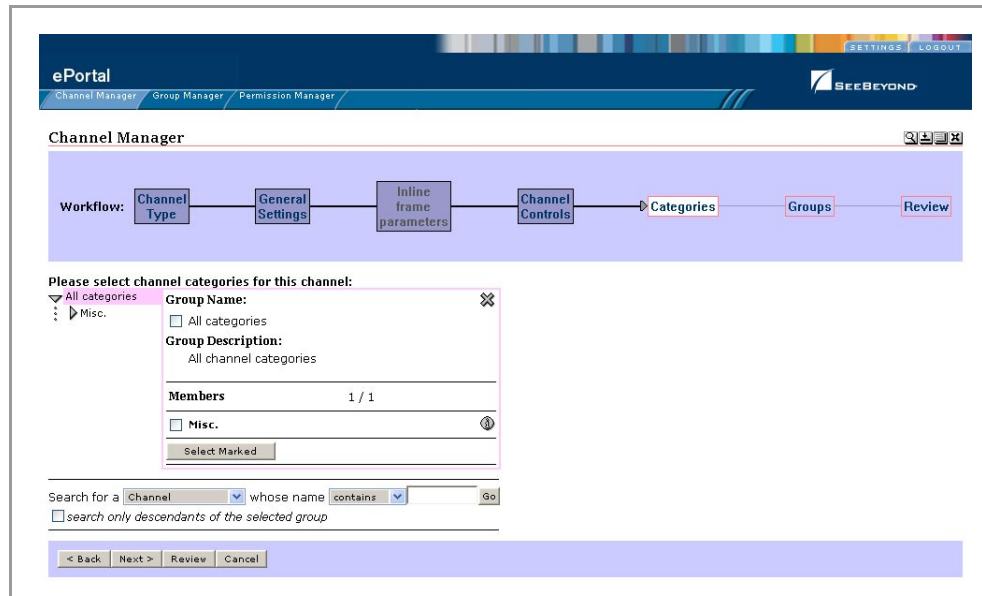
- 11 In the **Categories** area, to assign the channel to a category, select the drop-down arrow and select an appropriate category from the list.

This is a mechanism to group channels together in related categories.

- 12 To add the channel to the category, click **Add**.

The category is displayed to the right of the **X** under the **Selected Category** heading. To remove the channel from the category, under the **Option** heading, click **X**. See Figure 18.

Figure 18 Assigning a category



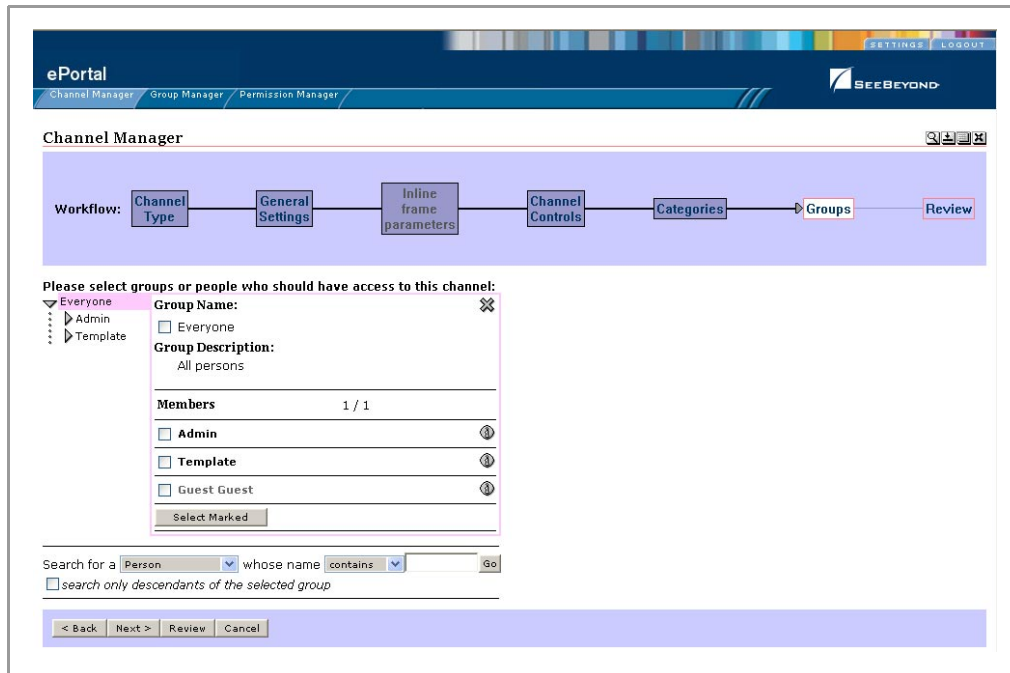
- 13 When you are finished, click **Next**.
- 14 In the **Groups** area, to specify the groups or people that you want to have access to the channel, select the drop-down arrow and select the groups from the list, and then click **Add**.

Note: This step is essential. ePortal Composer limits channel access to only the selected groups.

The group is displayed to the right of the **X** under the **Selected Group** heading. To remove the channel from the group, under the **Option** heading, click **X**.

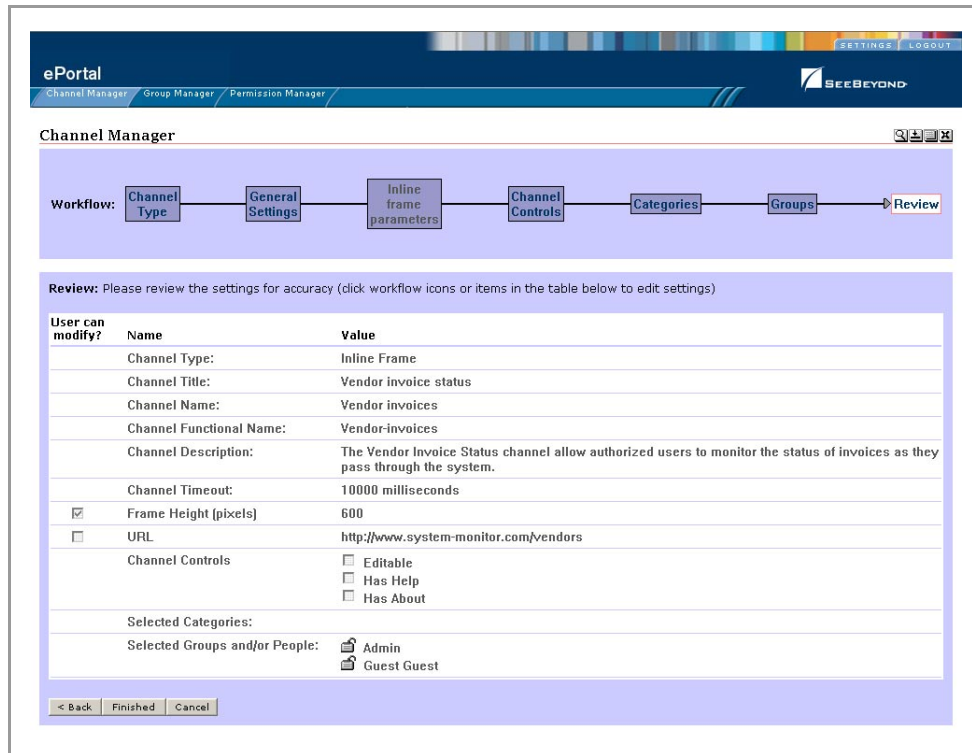
See [Figure 19 on page 35](#).

Figure 19 Assigning a group



- 15 When you are finished, click **Next**.
- 16 In the **Review** area, audit the information you provided for the channel. See [Figure 20 on page 36](#).

Figure 20 Reviewing channel parameters



- 17 When you are satisfied with the information, to complete the channel creation procedure, click **Finished**.

Note: If you exit before you click **Finished**, all your changes will be discarded.

Portal Administration: Personalization

This chapter describes how to personalize a portal. By personalizing a portal, users can create different views of business information.

Initially, a new user has no layouts or channel options configured for their personal view. (A layout refers to the placement of objects on a user's view of a particular channel.) When a new user logs into ePortal prior to personalization, only three options will be available: **Home**, **Preferences**, and **Logout**.

5.0.1 Before you Begin

By default, all users are allowed personalization privileges, however, ePortal server administrators may choose to restrict access to the personalization tools.

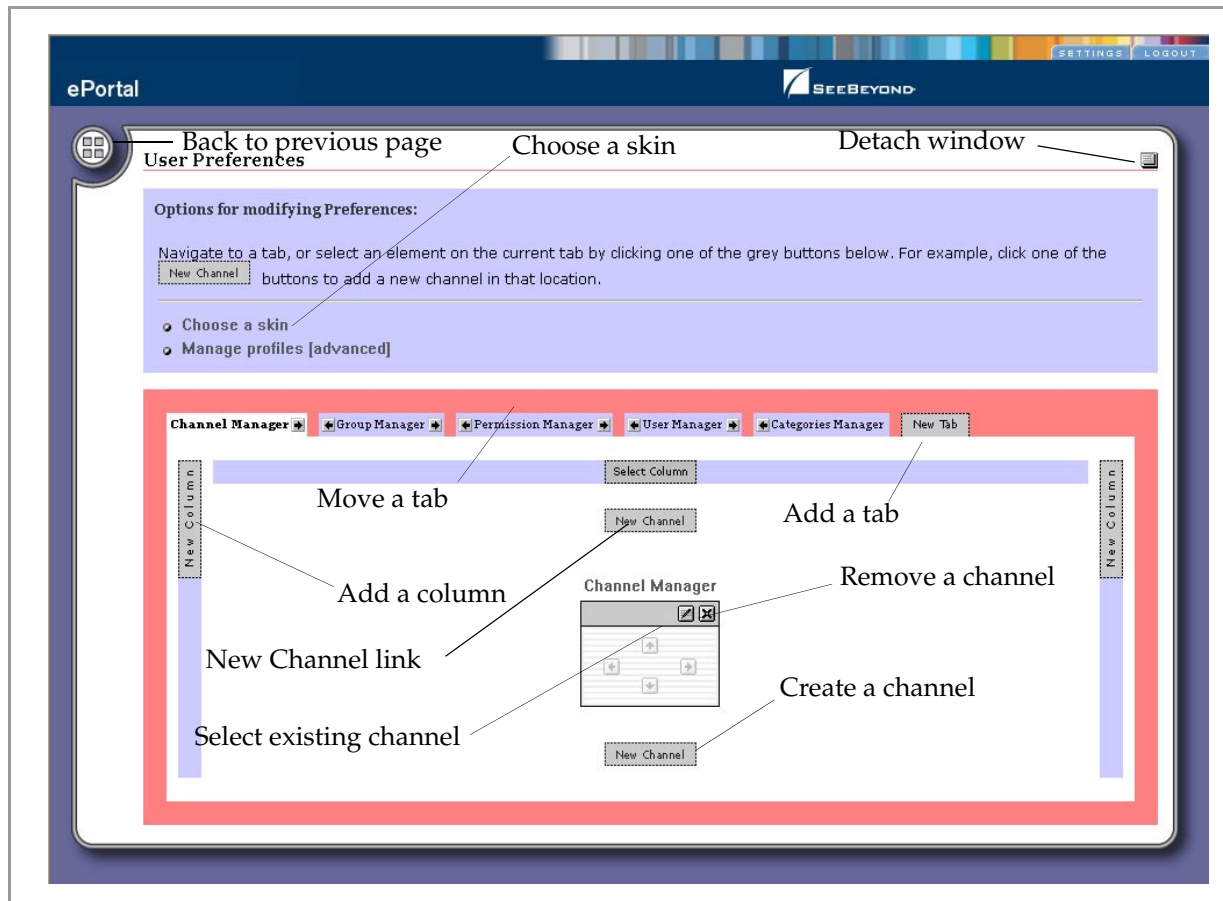
5.1 Personalizing a View

Using ePortal Composer to personalize a portal view is described below.

- 1 Start your browser.
- 2 On the address line, type the URL for ePortal, for example:
http://localhost:18003/ePortal
- 3 On the **Login** page, type the administrator user name and password, for example:
 - Username = **Administrator**
 - Password = **STC**
- 4 Click **Login**.
The **ePortal Composer Administration** page will be displayed in your browser. The **Channel Manager** tab is the default.
- 5 Click the **Settings** tab.
- 6 To configure a layout, or add channels to the current view, click the **Preferences** link.

The **User Preferences** page is displayed. See [Figure 21 on page 38](#).

Figure 21 Defining user preferences



The **User Preferences** page allows you to:

- Move tabs in the view.
- Add tabs to the view.
- Add, move, and resize columns in the view.
- Add channels to the view.
- Remove channels from the view.

5.1.1 Adding a Channel to a View

Add a channel to the view by doing the following:

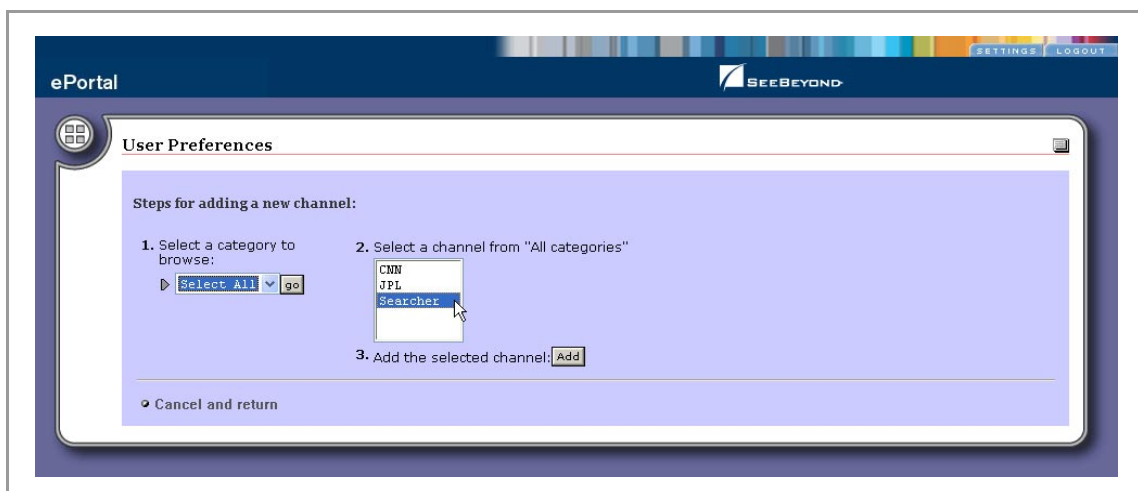
- 1 Select the **New Channel** link. See [Figure 22 on page 39](#).

Figure 22 New Channel link



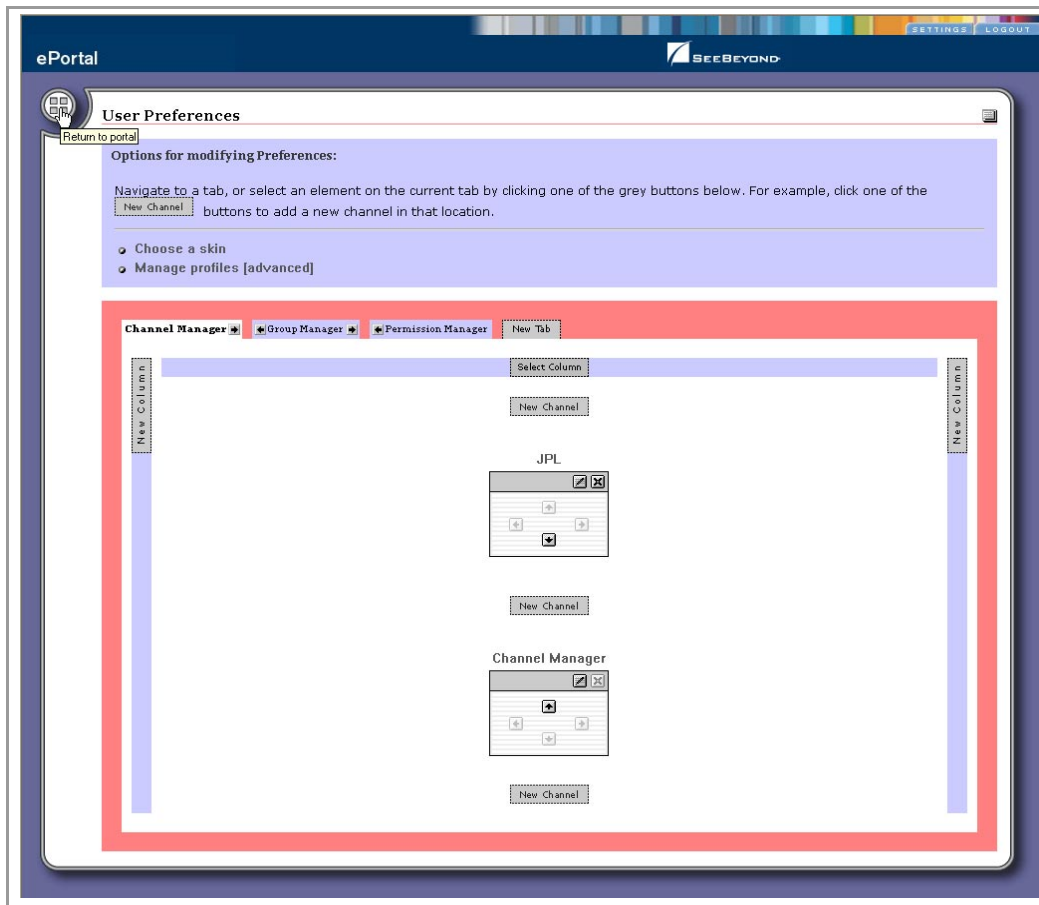
- 2 From the **Categories** drop-down list, select a category, and then click **Go**.
A list of channel categories will be displayed. See Figure 23.

Figure 23 Channel categories list



- 3 Select the channels you want to add, and then click **Add**.
You can add as many channels as you wish. See [Figure 24 on page 40](#).
- 4 To remove a channel, click on the **X** icon on the top right corner of the channel image.
- 5 To select the current channel for modification, click the **pencil** icon on the left of the channel image.

Figure 24 Adding channels

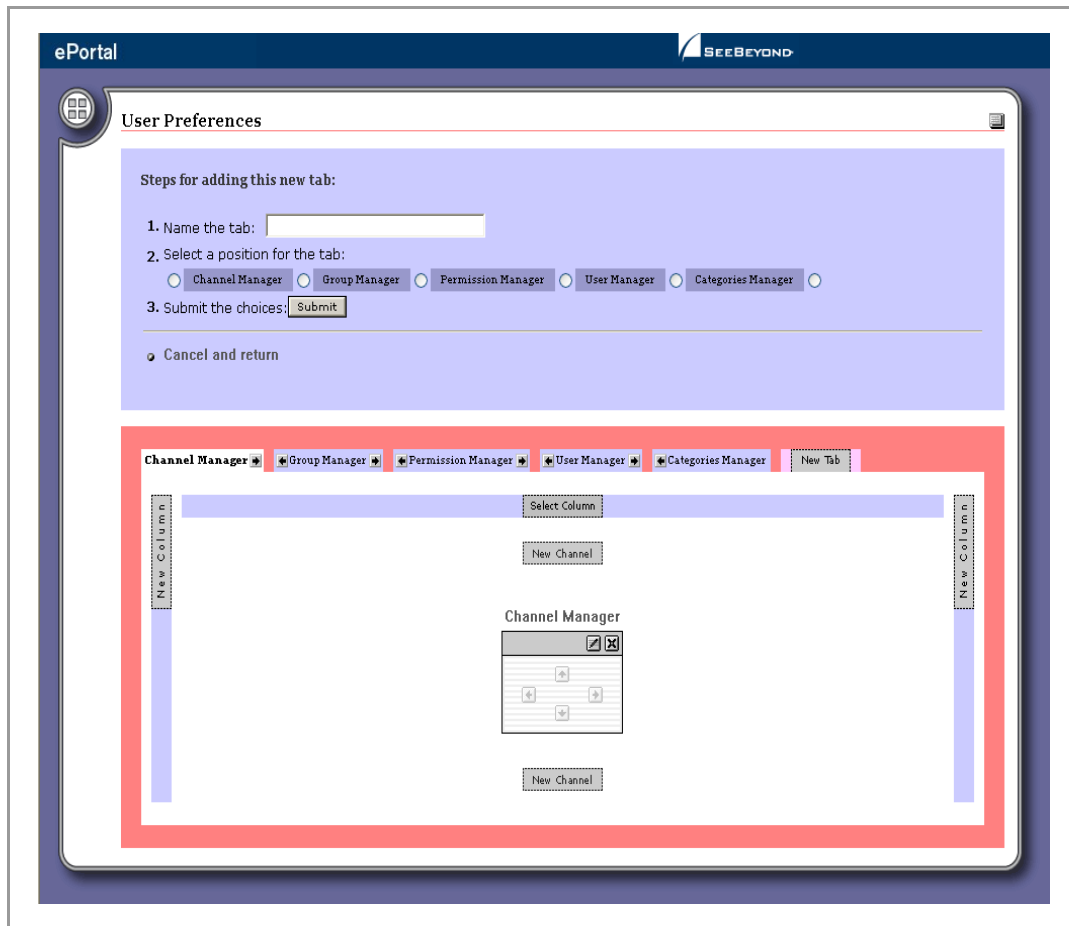


5.1.2 Adding a Tab to a Channel View

Tabs allow you to organize the channels to be presented in a user's view. You can add as many tabs as you wish.

- 1 To create a tab, on the **User Preferences** page, click **New Tab**. See [Figure 25 on page 41](#).

Figure 25 Creating a tab



- 2 Type a name for the tab.
- 3 Specify the location for the tab relative to the other tabs in the view.
- 4 Click **Submit**.
- 5 To cancel the operation at any time, select the **Cancel and return** link.
- 6 When you return to the **User Preferences** page, you can select the arrows on either side of the tab to move it one to the right or left relative to the other tabs.

5.1.3 Modifying a Tab

- 1 To modify a tab, on the **User Preferences** page, select a tab from the row of tabs.
- 2 Do any of the following:
 - Make the tab the default tab.
 - Rename the tab.
 - Move the tab relative to the other tabs in the view.
 - Lock (or unlock) the tab.

- Delete the tab.
- 3 Click **Submit**.
- 4 To cancel the operation at any time, select the **Cancel and return** link.

5.1.4 Adding a Column to a Channel View

You can add columns to channels to be presented in a user's view. You can add as many columns as you wish.

- 1 To create a column, on the **User Preferences** page, click **New Column**.
- 2 Specify a width value for the new column.
The total column widths should equal 100% of the page.
- 3 Click **Submit**.
- 4 To cancel the operation at any time, select the **Cancel and return** link.

5.1.5 Modifying a Column

You can move and resize existing columns.

- 1 In the column you want to modify, select the **Select Column** link.
- 2 Do any of the following:
 - Specify a width value for the new column.
The total column widths should equal 100% of the page.
 - Move the column.
 - Delete the column.
- 3 Click **Submit**.
- 4 To cancel the operation at any time, select the **Cancel and return** link.

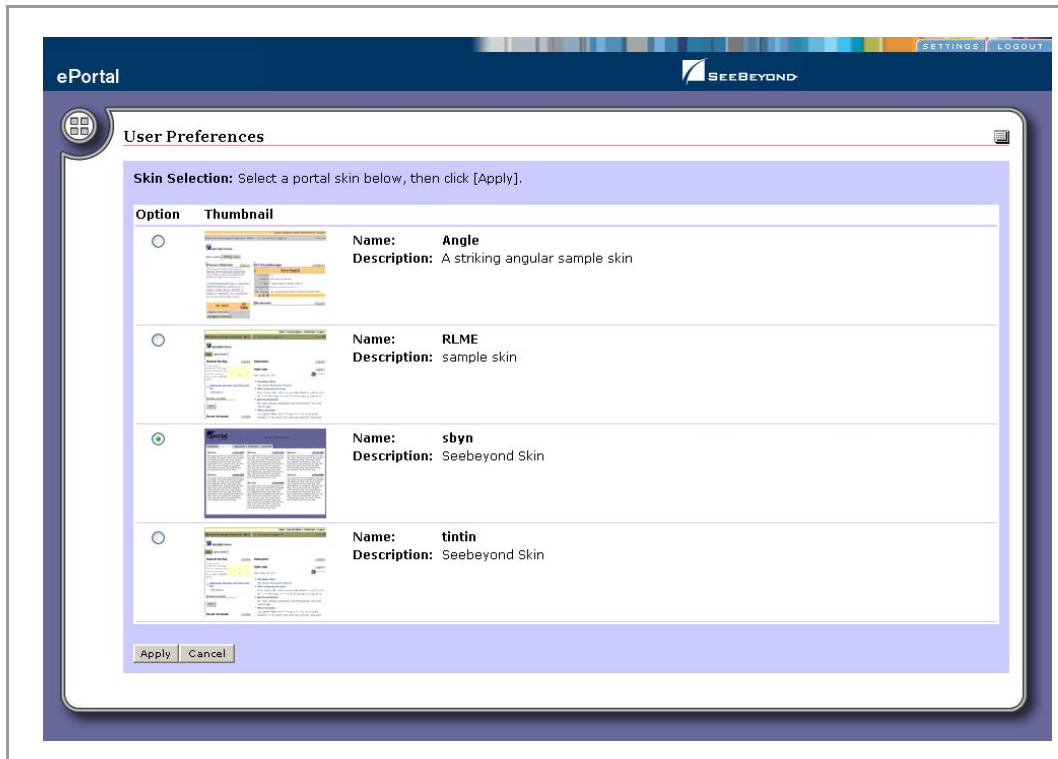
5.1.6 Changing the Skin of a Channel View

ePortal provides an initial set of template Web page skins. You can employ these skins to personalize a channel to appeal to a particular user's profile.

To Change the Skin of a Channel User's Default View

- 1 On the **User Preferences** page, select the **Choose a skin** link. See [Figure 26 on page 43](#).

Figure 26 Choosing a skin



2 To apply the skin, in the **Skin Selection** area, select a skin, and then click **Apply**. You are now ready to explore ePortal using your own end-user account.

Portal Administration: Managing Groups

This chapter describes how to manage groups in ePortal Composer.

6.0.1 Before you Begin

Only ePortal administrators are allowed to create and modify groups. The following procedures assume that you have ePortal server administrator privileges.

6.1 Creating and Modifying Groups

The Groups Manager channel allows the administrator to manipulate groups, group memberships, and their permissions.

In a channel, groups are structured in a hierarchy that the administrator creates and can modify. The top-level (master) group is called **Everyone**. All individuals with any level of access to the channel are members of the **Everyone** master group. The **Group Manager** page provides a view of existing groups and the mechanism for the administrator to set the attributes and permissions for a group.

6.1.1 About Groups

A group can be a member of zero or more groups. Group members have privileges assigned to them directly or as inherited from the hierarchy of group memberships, which enables multiple inheritance instances.

The **root group** is a special group that is the parent of all groups of a particular type. The **Group Manager** channel requires the root groups to organize the initial view. Root groups are also used by the search function to determine the types that can be searched.

In a typical implementation, the All categories group is the root group of all channel definition groups, and Everyone group is the root group of all Person groups. Root group properties are used to determine which groups are root groups.

Group members can be displayed in the detail view by clicking the group name to open a panel containing group information. Group members are displayed in detail view from this panel also by clicking the group name. In addition, properties for a group member can be displayed by clicking on the **info** icon. You can edit the group in detail view by clicking the **lock** icon.

Adding a Group

The **Group Manager** channel initially displays all root groups. User permissions determine the group members that the user sees as well as the functions that are made available for each group member. Using ePortal Composer to create and modify groups is described below.


Log Into ePortal Composer

- 1 Start your Browser.
- 2 Go to **http://localhost:18003/ePortal**. On the address line, type the URL for ePortal, for example:

http://localhost:18003/ePortal

- 3 On the **Login** page, type the administrator user name and password, for example:
 - Username = **administrator**
 - Password = **STC**

Adding a sub-group (a group within a group) to an existing group is described below.

- 1 On the **ePortal Composer Home** page, select the **Group Manager** tab.
- 2 In the **Group Manager** area, under the **Groups** heading, click the expansion arrow  to the left of the **Everyone** label to expand the list of groups.

All groups are subordinate to the **Everyone** master group.


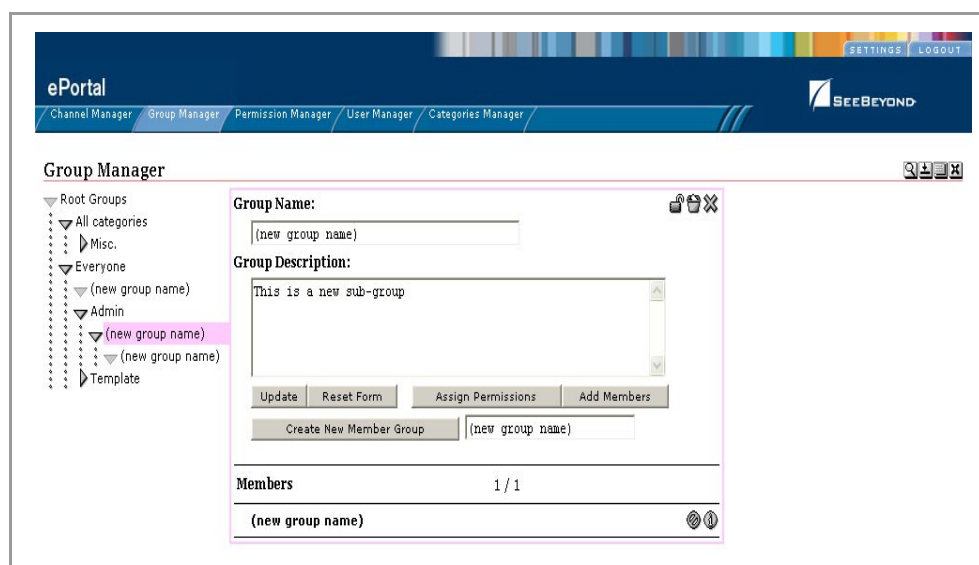
- 3 To expand a group listing, click the expansion arrow  to the left of the group name, for example: **Template**.
- 4 To create a new sub-group within the selected group, select the **Create New** field, type a new sub-group name, and click **Create New**. See Figure 27.

Figure 27 Creating a new sub-group



Under the **Members** heading, the new group name is added to the group list.

Modifying an Existing Group

Editing Groups

The Edit View allows you to update group information. For example:

- You can delete a group by clicking the **Trash Can** icon. This will physically delete the group and remove references to it from all other groups.
- You can change the group name and description by clicking the **Update** button.
- You can define a group as a sub-group by typing the name of the new group in the input box where **(new group name)** is displayed, and then clicking the **Create New Member Group** button.
- You can add existing group members to the group by clicking the **Add Members** button.
- You can assign permissions to the group by clicking the **Assign Permissions** button to launch the **Permissions Manager** channel. When you are finished, you can click the unlock icon (**Finish Editing Group**) to release the group.

Adding Members to a Group

To add members to a group, click the **Add Members** button. Then in detail view, group members can be selected by clicking the checkbox by the group and then clicking the **Select Marked** button. The view is then shown with a permanent X along side the selected members. When are finished selecting members, click the **Done with Selection** button, and the selected member will be added to the selected parent group.

Steps

The following procedures describe how to edit a group's properties, such as the group's name, description, members, and permissions.



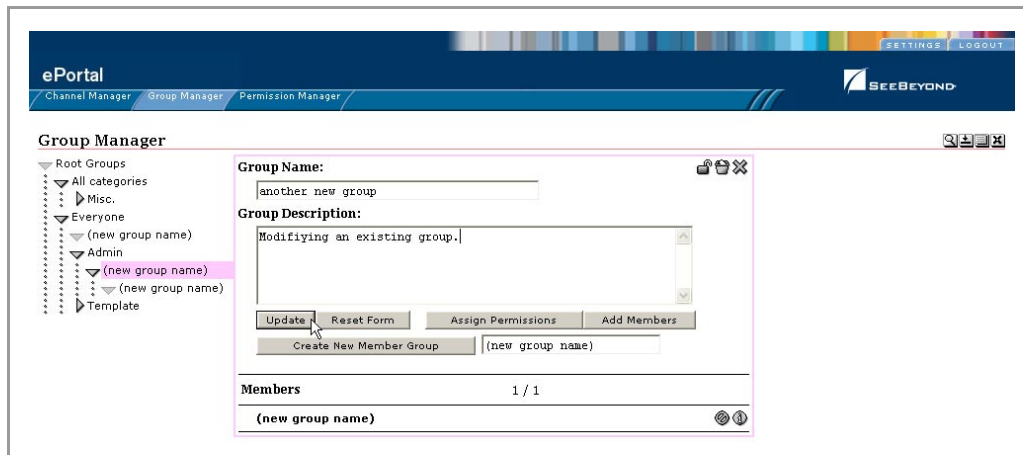
- 1 On the **ePortal Composer Home** page, select the **Group Manager** tab. See [Figure 28 on page 47](#).
- 2 To expand the list to view the existing groups, click the expansion arrow  to the left of the **Everyone** label:.
- 3 To view the group you want to modify, click the expansion arrow  to the left of the group name.
- 4 Select the sub-group you want to modify.

Figure 28 Modifying a group



- 5 Do any of the following:
 - Under **Name**, type a new name for the group.
 - Under **Description**, modify the group’s description.
 - To add a member to the group, click **Add Members**.
 - To assign permissions to the group, click **Assign Permissions**.
 - To create a new group, click **Create New**.
- 6 Select the check box aligned with the group name to which you want to add a member.
- 7 Click **Done**.


Assigning Permissions

To assign permissions, click the **Assign Permissions** button. (You will be granting permissions to the group that you are currently editing.) To select group members to grant permissions, click the checkbox to the left of the group member’s name, and then click **Select Marked**. When you are finished selecting group members, click **Done with Selection**.

The **Permissions Manager** channel displays a grid with the principals organized in previous in rows with their permissions in columns. You can select **Grant** or **Deny** from the associated drop-down lists. To save the permissions, click the **Submit** button.

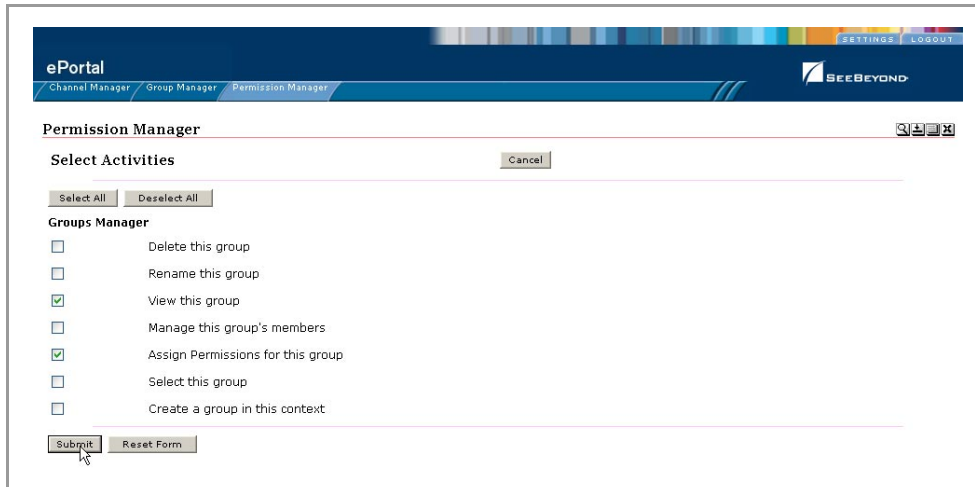
To Assign Permissions to an Existing Group

This procedure describes how to assign channel access permissions to principals (individuals) within an existing group.

- 1 On the **ePortal Composer Home** page, select the **Group Manager** tab. See [Figure 29 on page 48](#).
- 2 To expand the list to view the existing groups, click the expansion arrow  to the left of the **Everyone** label.

- 3 To view the group you want to modify, click the expansion arrow ▶ to the left of the group's name.
- 4 In the expanded list, select the group or sub-group you want to modify.
- 5 Click **Assign Permissions**.

Figure 29 Assigning permissions to a group



The screenshot shows the ePortal interface with the 'Permission Manager' tab selected. The page title is 'Permission Manager'. Below the title, there is a 'Select Activities' section with a 'Cancel' button. Underneath, there are 'Select All' and 'Deselect All' buttons. The 'Groups Manager' section contains a list of activities with checkboxes:

- Delete this group
- Rename this group
- View this group
- Manage this group's members
- Assign Permissions for this group
- Select this group
- Create a group in this context

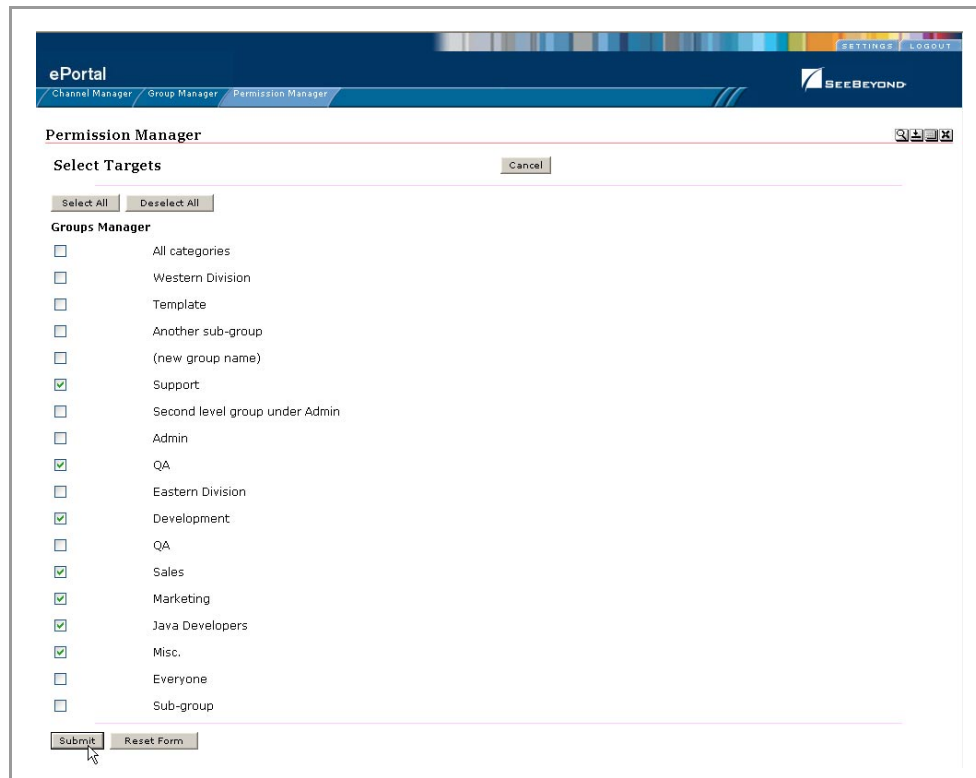
At the bottom of the list, there are 'Submit' and 'Reset Form' buttons.

- 6 Select the names to which you want to assign permissions.
- 7 To add or remove names, click **Select** and **Deselect**.
- 8 When you are finished selecting names, click **Done**.
- 9 To assign group-level permissions (**Grant** or **Deny**), toggle the values in the labeled drop-down lists. See [Figure 30 on page 49](#).

Within the current group, you can grant or deny permission to do the following:

- ♦ Delete the group.
- ♦ Rename the group.
- ♦ View the group.
- ♦ Manage the group's members.
- ♦ Assign permissions to the group.
- ♦ Select a group within the current group.

Figure 30 Assigning group-level permissions



10 When the group's permissions are set, click **Submit**.

6.1.2 Searching Groups

You can search for any entity type that is contained in a root group and for any group of such entities. To search for particular groups, you search based on **arguments**. For example:

- To search for a **Group of Persons** (the first argument), change the second argument to **contains** or **starts with** and the third argument to **administrators**.
- To search within the current group only, select the **Search only descendants of the selected group** checkbox.

When you click **Go**, a new **Search results** element will be created that contains an element for each member in the results.

Enabling the Search Module

ePortal Composer provides a search engine that allows you to search for and upload files and documents to the repository from external locations and then retrieve them based on search criteria. To enable this facility, you have to create a channel for it.

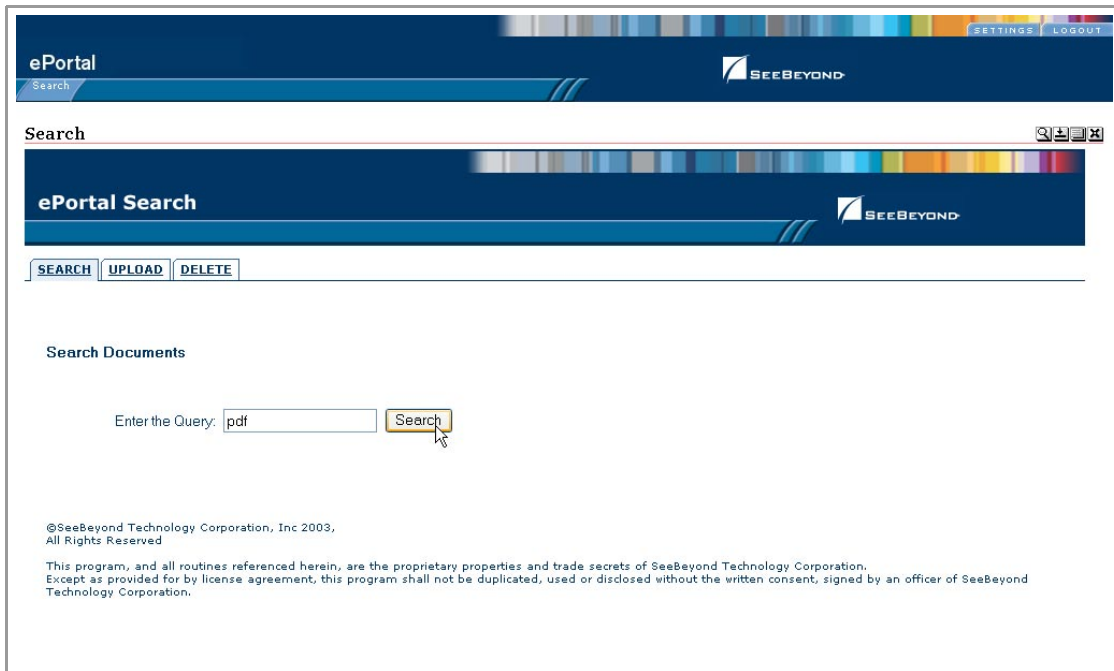
7.0.1 About the ePortal Search Engine

The **ePortal Search Engine** enables you to browse anywhere on your local machine or network, and then upload selected files to the Repository. See Figure 31.

Figure 31 ePortal Composer Search Facility: Upload

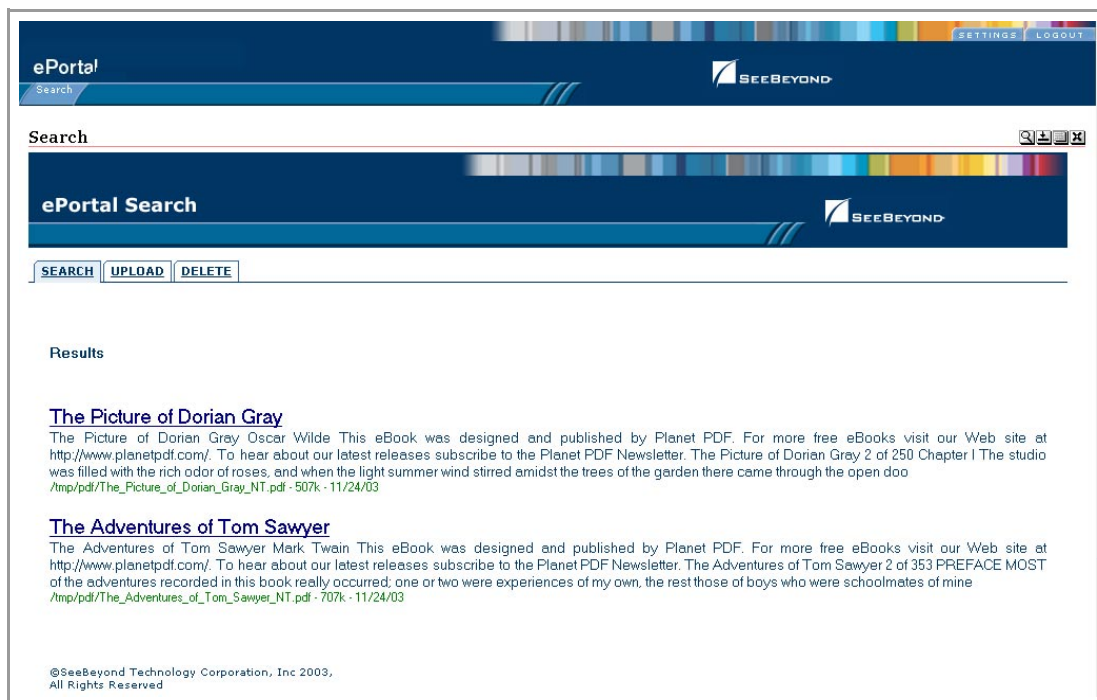
When you have compiled several files in the Repository, you can launch a query and the Search engine will scan the Repository for files that fit the search criteria. For example, you could query for all documents and files with **pdf** in the file name. See [Figure 32 on page 51](#).

Figure 32 ePortal Composer Search Facility: Query



All files in the Repository that fit the search criteria will be displayed on the **Results** page. See Figure 33.

Figure 33 ePortal Composer Search Facility: Query Results



7.0.2 Creating a Channel for the Search Facility

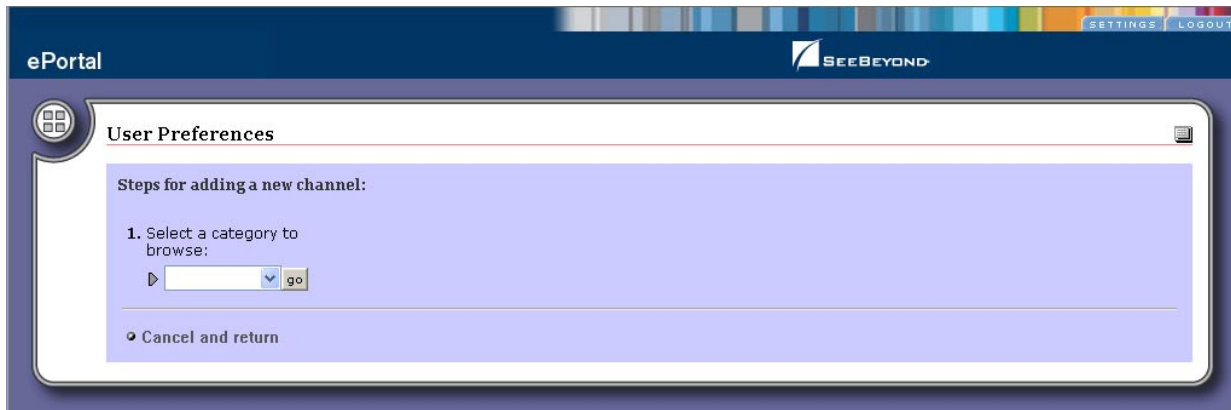
This section describes how to create a channel for the ePortal Search Facility, using the **guest** ID and password.

Log into ePortal Composer

- 1 Start your Browser.
- 2 On the address line, type the URL for ePortal, for example:
http://localhost:18003/ePortal
- 3 On the **Login** page, type the **guest** user name and password, for example:
 - Username = **guestr**
 - Password = **guest**
- 4 Click **Login**.
- 5 To initial ePortal page, click the **SETTINGS** tab.

The **User Preferences** startup page for adding a new channel appears. See Figure 34.

Figure 34 User Preferences: Adding a New Channel



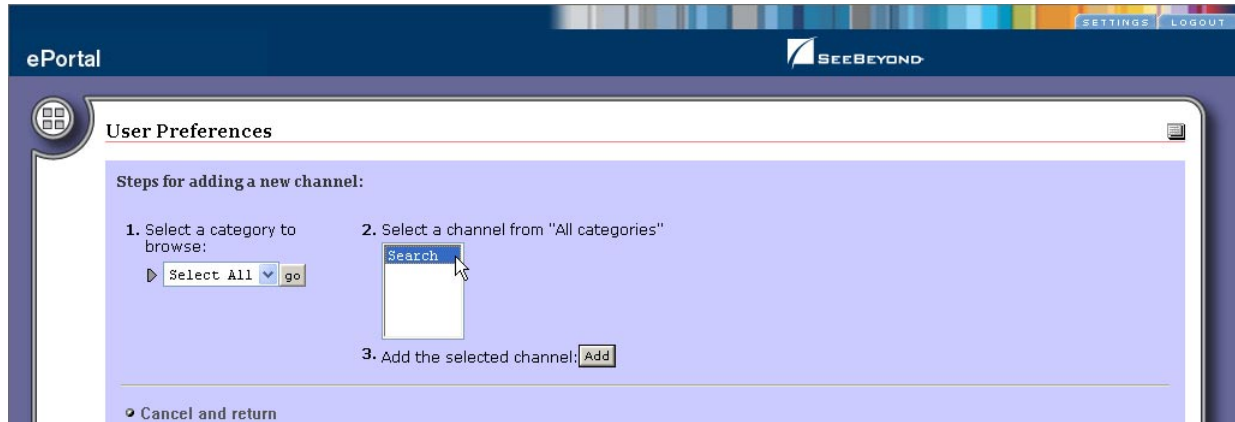
- 6 On the **User Preferences** page, select a category to browse, and then click **Go**. See Figure 35.

Figure 35 User Preferences: Selecting a Category



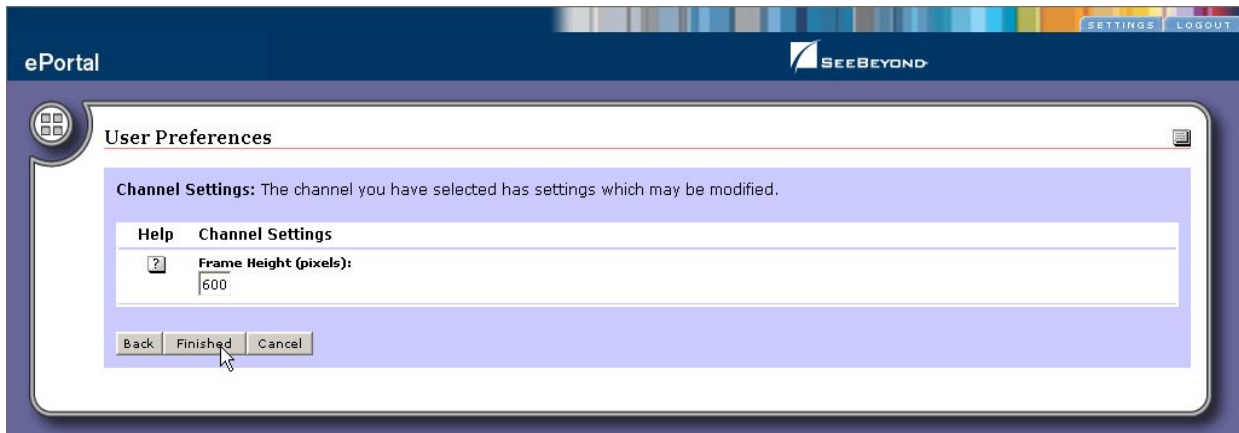
- 7 On the **User Preferences** page, select a channel from the category, and then click **Add**. See Figure 36.

Figure 36 User Preferences: Selecting a Channel



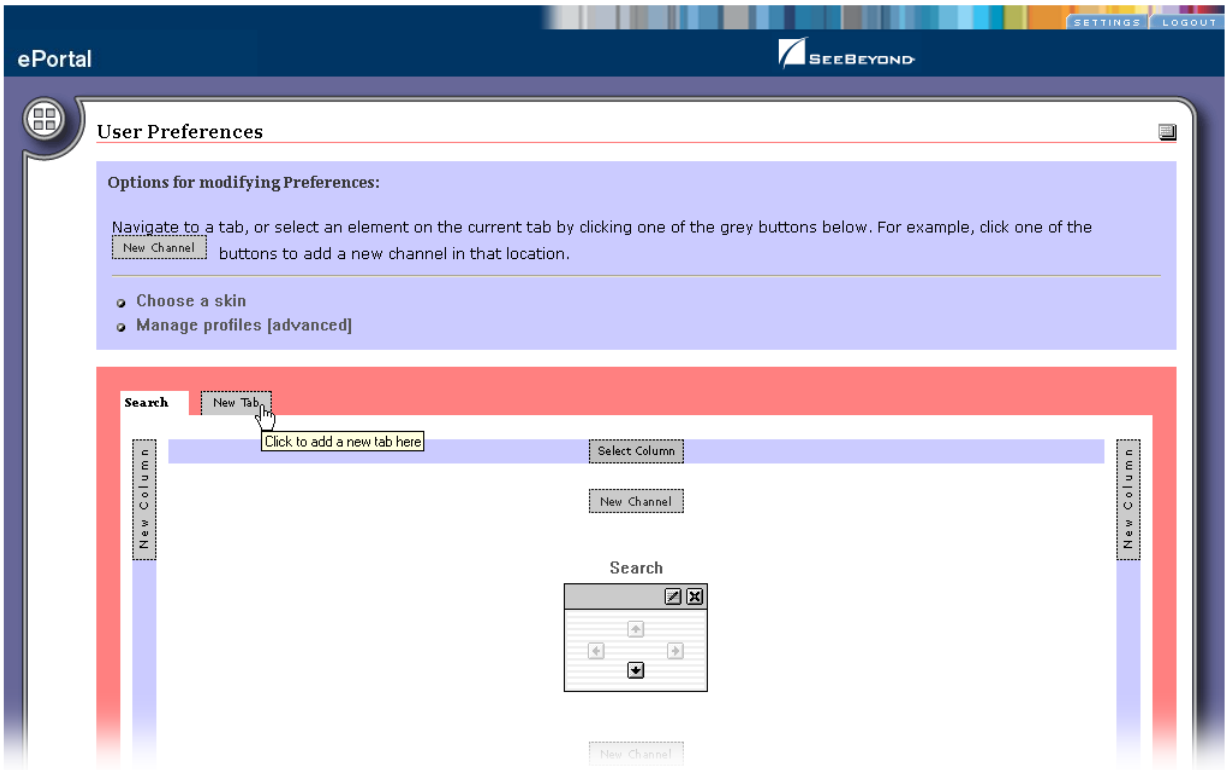
- 8 On the **User Preferences** page, set the frame height in pixels, and then click **Finished**. See Figure 37.

Figure 37 User Preferences: Setting the Frame Height



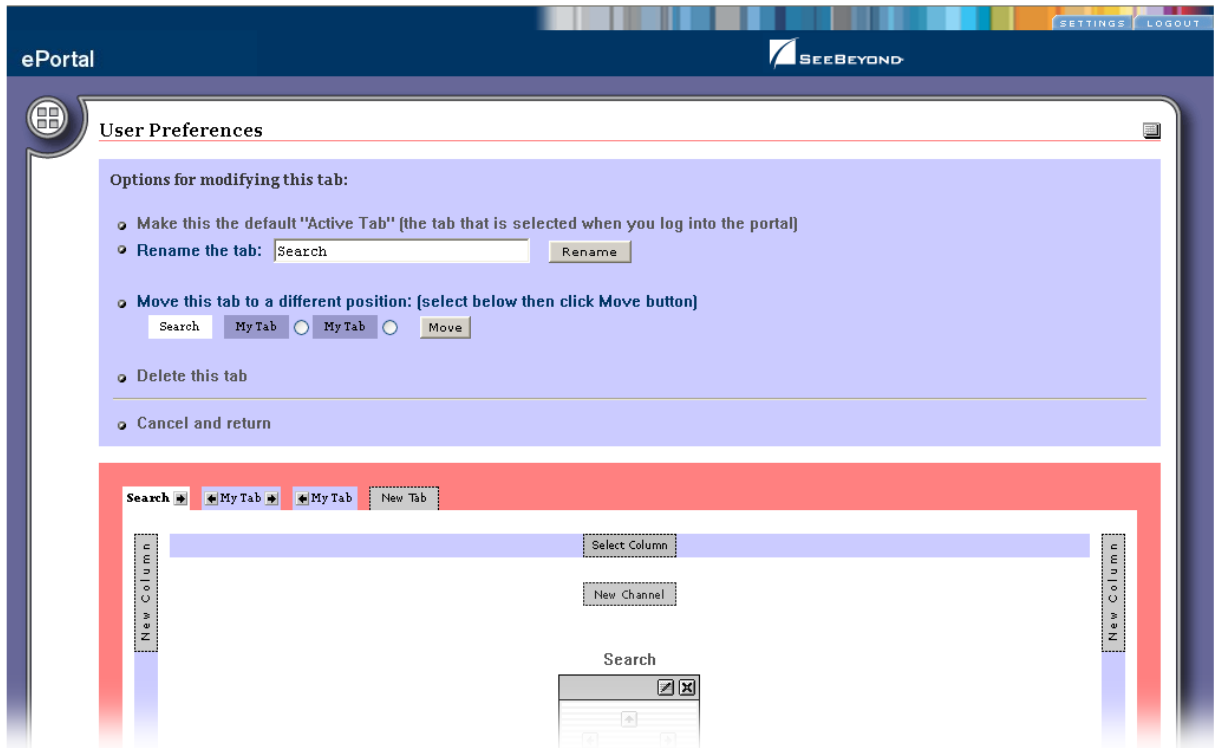
On the **User Preferences Options** page, select **New Tab**. See [Figure 38 on page 54](#).

Figure 38 User Preferences: Adding a New Tab



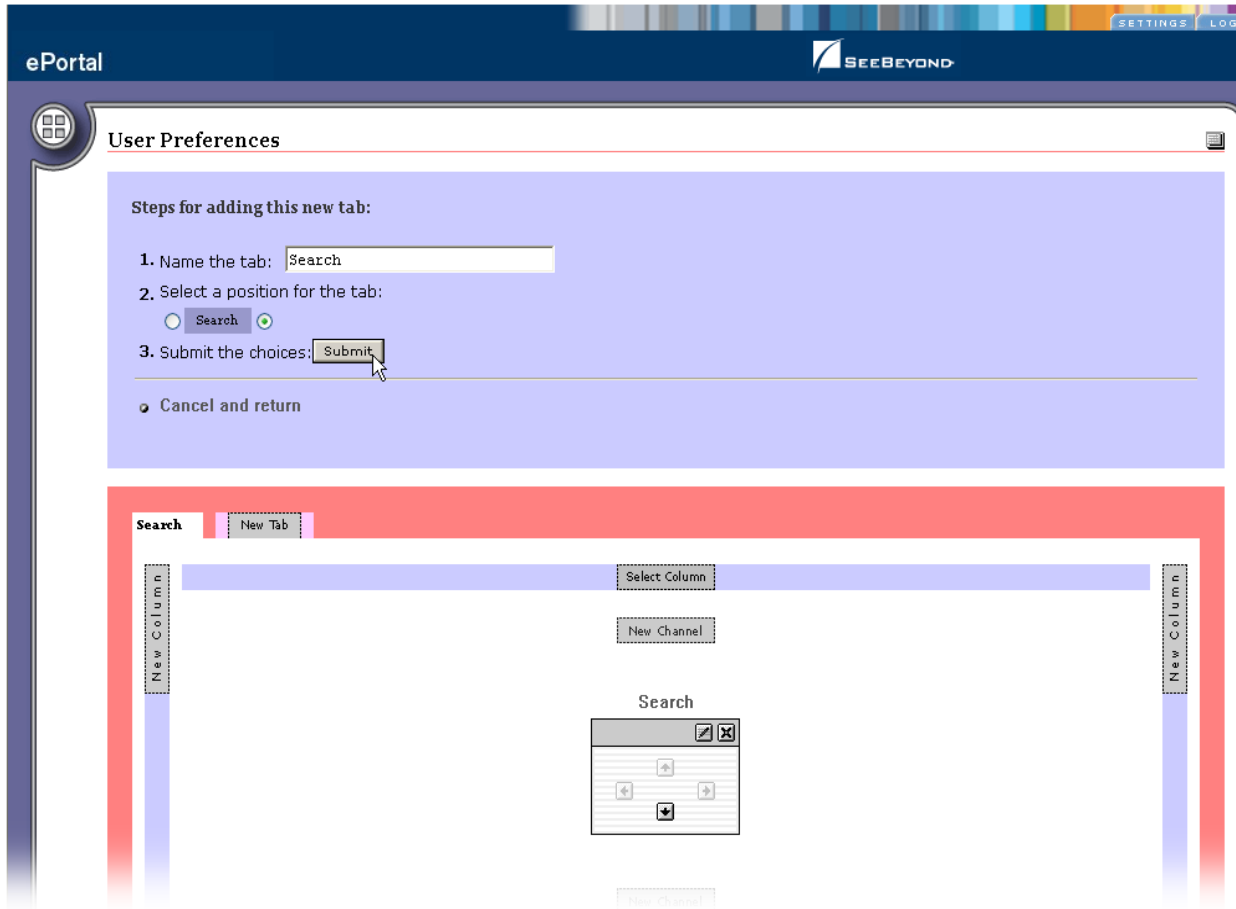
- 9 Using the radio buttons on the **Options** page, select a position for the new tab. See [Figure 41 on page 57](#).

Figure 39 User Preferences: Naming the Search Tab



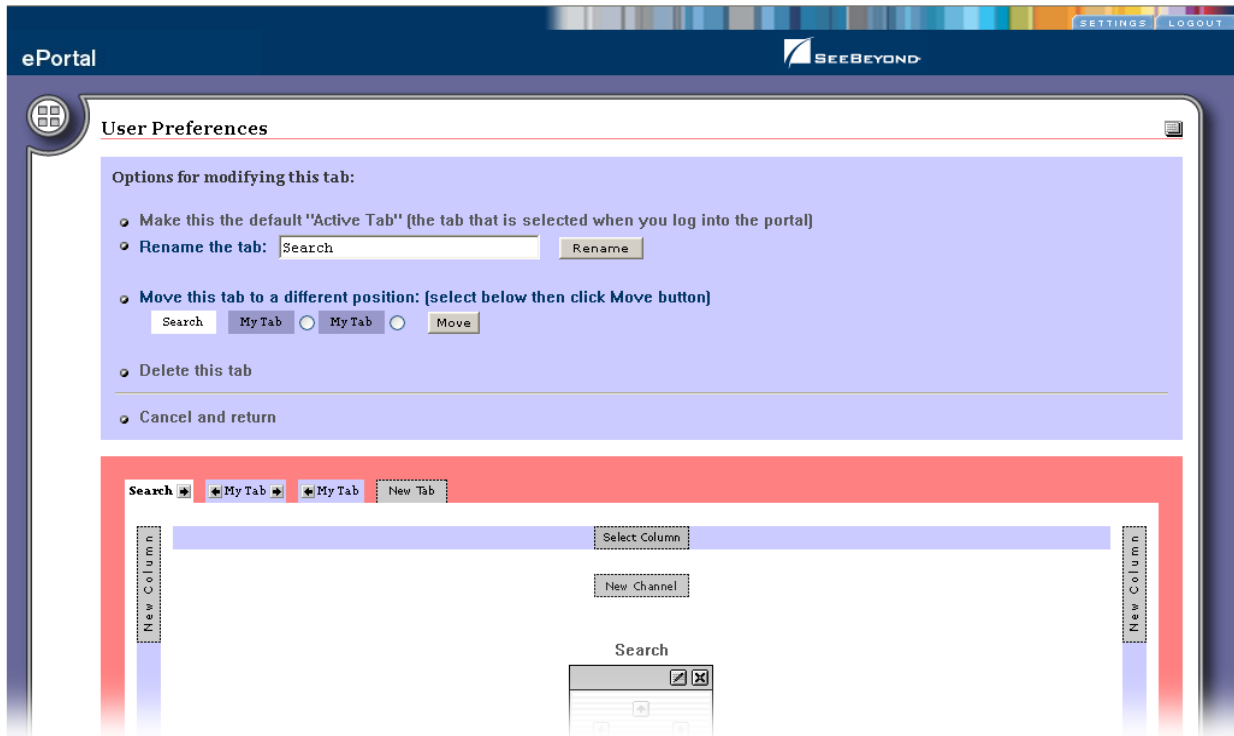
- 10 To submit the selections and generate the new tab, click **Submit**. See [Figure 40](#) on [page 56](#).

Figure 40 User Preferences: Submitting Choices



11 Specify the **Search** tab as the default at login. See [Figure 41 on page 57](#).

Figure 41 User Preferences: Defining Search as the Default Tab



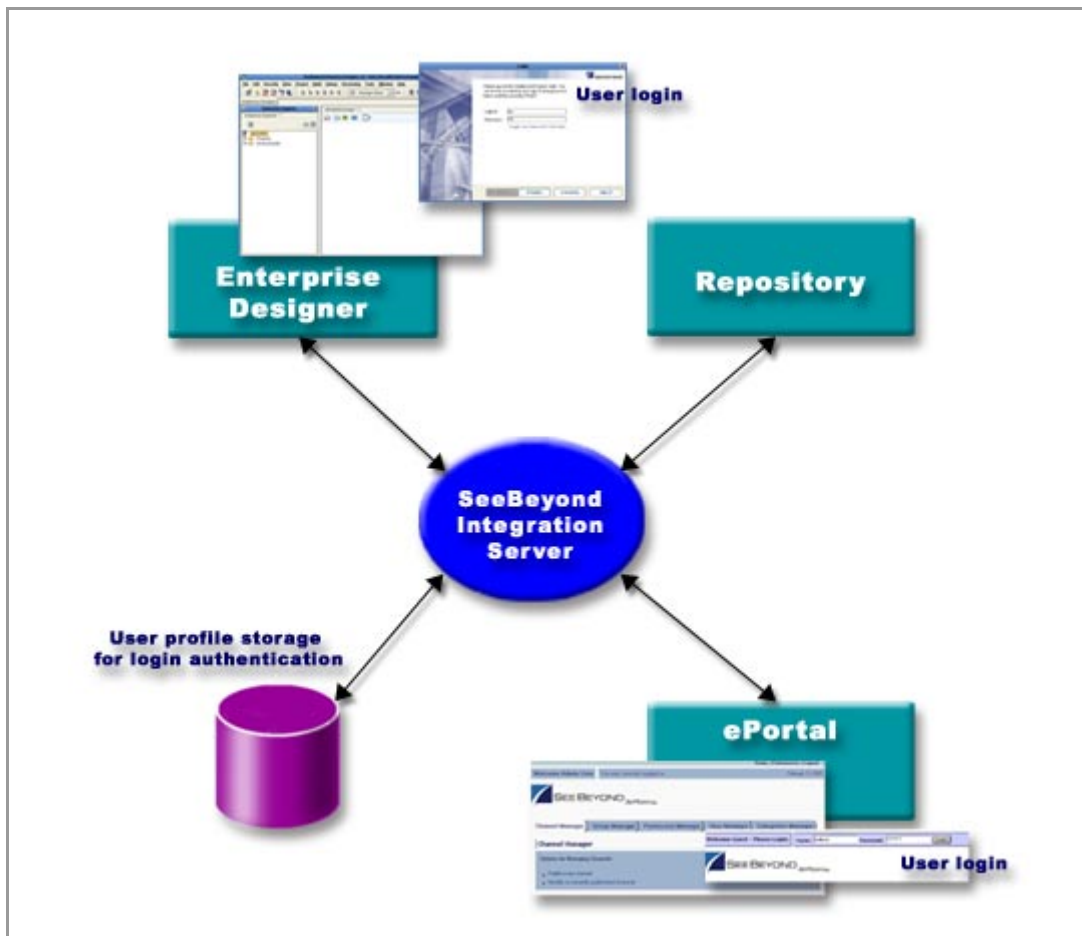
User Login Authentication

ePortal Composer uses the Security Service on the SeeBeyond Integration Server to authenticate user IDs and passwords at login. User attributes such as login ID, password (credential), and properties such as first and last names, e-mail address, and other user profile information are then maintained in a persistent data storage area.

User profile information can be stored in XML files, which can be located on RDBMS or LDAP servers.

An example of the user login authentication process is illustrated in Figure 42.

Figure 42 ePortal Composer Login Authentication



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