

SeeBeyond ICAN Suite

ePortal Composer User's Guide

Release 5.0.4



The information contained in this document is subject to change and is updated periodically to reflect changes to the applicable software. Although every effort has been made to ensure the accuracy of this document, SeeBeyond Technology Corporation (SeeBeyond) assumes no responsibility for any errors that may appear herein. The software described in this document is furnished under a License Agreement and may be used or copied only in accordance with the terms of such License Agreement. Printing, copying, or reproducing this document in any fashion is prohibited except in accordance with the License Agreement. The contents of this document are designated as being confidential and proprietary; are considered to be trade secrets of SeeBeyond; and may be used only in accordance with the License Agreement, as protected and enforceable by law. SeeBeyond assumes no responsibility for the use or reliability of its software on platforms that are not supported by SeeBeyond.

SeeBeyond, e*Gate, e*Way, and e*Xchange are the registered trademarks of SeeBeyond Technology Corporation in the United States and/or select foreign countries. The SeeBeyond logo, SeeBeyond Integrated Composite Application Network Suite, eGate, eWay, eInsight, eVision, eXchange, eView, eIndex, eTL, ePortal, eBAM, and e*Insight are trademarks of SeeBeyond Technology Corporation. The absence of a trademark from this list does not constitute a waiver of SeeBeyond Technology Corporation's intellectual property rights concerning that trademark. This document may contain references to other company, brand, and product names. These company, brand, and product names are used herein for identification purposes only and may be the trademarks of their respective owners.

© 2004 by SeeBeyond Technology Corporation. All Rights Reserved. This work is protected as an unpublished work under the copyright laws.

This work is confidential and proprietary information of SeeBeyond and must be maintained in strict confidence.

Version 20040604110553.

Contents

List of Figures	7
List of Tables	10
<hr/>	
Chapter 1	
Introduction	11
Intended Audience	11
Information and Organization	11
Writing Conventions	12
General Conventions	12
Additional Conventions	13
SeeBeyond Web Site	13
<hr/>	
Chapter 2	
About ePortal	14
Overview: Introduction to ePortal	14
About Channels	15
Authentication	16
Web-based Portal Administration and Management	16
<hr/>	
Chapter 3	
Installation	17
Supported Operating Systems	17
System Requirements	18
External System Requirements	18
Prerequisites for Installation	19
Web Server	19
Database	19
Application Components	19

Installation and Configuration Overview	19
Installing ePortal Using the Enterprise Manager	20
Uploading ePortal	21
Downloading and Extracting the ePortal Files	21
Configuring ePortal	22
Setting Up the Integration Server	22
Setting Up WebSphere	23
Setting Up Authentication	23
Authentication Without the Integration Server	23
Authentication and the Integration Server	23
Editing the eportal.properties File	27
Unpackaging and Repackaging the ePortal.ear File	28
Unpackaging the ePortal.ear File	28
Repackaging the ePortal.ear file	29
Configuring ePortal for an External Database	30
Configuring ePortal for LDAP	30
Setting Integration Server Properties for LDAP	30
Configuring the ePortal.ear File for LDAP	32
Configuring LDAP Roles and Users	36
Deploying ePortal on the Integration Server	38
Deploying ePortal Files	38
Validating the Installation	39
Running ePortal	40
Deploying ePortal on WebSphere	40
Configuring the ePortal.ear File	40
Configuring and Deploying ePortal on WebSphere	40
WebSphere Patch	41
Configuring ePortal Security	41
Deploying ePortal on WebSphere	49
Installing the Search Engine	56

Chapter 4

Getting Started	61
ePortal General Administration	61
Channel Management	62
Category Management	62
Group Management	63
Permissions Management	64
Assigning Group Managers	64
Publishing Channels	64
Subscribing to Channels	64
Fragment Management	65
ePortal Personalization	65
Logging On to ePortal	66
ePortal Tool Buttons	68

Chapter 5

System Administration	71
Overview	71
Basic Administration Operations	72
Managing Channels	74
Channel Manager Panel	74
Channel Types	74
Publishing a New Channel	75
Publishing a Search Engine Channel	82
Modifying a Channel	83
Using WSRP Consumer Channels	85
WSRP Overview	86
WSRP Consumer Channels in ePortal: Overview	86
Managing Groups	87
Groups Manager Panel	87
Panel Overview	88
Groups Manager Views and Information	88
Creating and Updating Groups	89
Creating a New Group	90
Modifying a Group	93
Groups Manager Edit Mode	94
Editing Groups	94
Searching Groups	94
Managing Categories	95
Adding a New Category	95
Modifying Categories	96
Managing Permissions	97
Permissions Manager Panel	97
Using and Managing ePortal Permissions	97
Roles	97
Permissions	98
Assigning Permissions to Groups	101
Assigning Permissions to Categories	105
Managing Fragments	106
Overview: Fragments in ePortal	106
Using Fragments	106
Mandatory Channels	106
Fragments Manager Panel	107
Working With Fragments	107
Creating Fragments	107
Modifying and Publishing Fragments	109
Custom Skins	109
Using Custom Skins	110
Managing Custom Skins	110

Chapter 6

User Personalization	114
Overview: Personalizing ePortal	114
User Preferences Toolbar	115
Personalizing a View	116
Adding a Tab With a Page View	116
Modifying a Tab	117
Adding a Column to a Page View	118
Modifying a Column	118
Adding a Channel to a Page View	118
Changing the Skin of a Page View	122
Adding a Pulled Fragment	123
ePortal Search Engine	124
Adding a Search Engine Page View	124
Using the Search Engine	126
Index	128

List of Figures

Figure 1	ePortal Within the ICAN Suite	15
Figure 2	User Management Context Menu	24
Figure 3	Adding the administration Role to the Administrator User	25
Figure 4	Adding Users in Enterprise Designer	26
Figure 5	Adding Roles in Enterprise Designer	26
Figure 6	User Management List for ePortal	27
Figure 7	Security Realm Configuration Properties	31
Figure 8	Sun ONE Directory Server Properties	32
Figure 9	Active Directory: Domain	36
Figure 10	Active Directory: Roles	37
Figure 11	Active Directory: LDAP Users	37
Figure 12	Administrative Console Page	41
Figure 13	Global Security Page	42
Figure 14	LTPA Page	43
Figure 15	LTPA Single Signon (SSO) Page	44
Figure 16	LDAP User Registry Configuration Page for Active Directory	45
Figure 17	LDAP User Registry Configuration Page for Sun ONE	46
Figure 18	LDAP User Registry for Advanced LDAP Settings Page	48
Figure 19	Global Security Page (Save)	49
Figure 20	Preparing for the Application Installation Page	49
Figure 21	Generate Default Binding Page	50
Figure 22	Deploying on WebSphere: Step 1 Page	50
Figure 23	Deploying on WebSphere: Step 2 Page	51
Figure 24	Deploying on WebSphere: Step 3 Page	51
Figure 25	Deploying on WebSphere: Step 4 Page	52
Figure 26	Save To Master Configuration	52
Figure 27	Save Page	53
Figure 28	Enterprise Applications Page	53
Figure 29	ePortal Application Configuration Tab	54
Figure 30	Session Management Parameters Page	55
Figure 31	Configuration Tab	56
Figure 32	Preparing for the Application Installation Page (Search 1)	56

Figure 33	Preparing for the Application Installation Page (Search 2)	57
Figure 34	Installing Search Engine: Step 1 Page	57
Figure 35	Installing Search Engine: Step 2 Page	58
Figure 36	Installing Search Engine: Step 3 Page	58
Figure 37	Installing Search Engine: Step 4 Page	59
Figure 38	Installing Operation Page	60
Figure 39	Save to Master Configuration	60
Figure 40	Personalized Channels	66
Figure 41	ePortal User Startup Page	67
Figure 42	ePortal Administrator Home Page	68
Figure 43	Administrator's Home Page	72
Figure 44	Administration Operations Flow	73
Figure 45	Selecting the Channel Type	76
Figure 46	Selecting General Settings	77
Figure 47	Selecting In-line Frame Parameters	78
Figure 48	Selecting Channel Parameters	79
Figure 49	Selecting Channel Controls	79
Figure 50	Selecting Categories	80
Figure 51	Selecting Groups (Roles)	81
Figure 52	Reviewing Channel Setups	82
Figure 53	Modifying a Channel	84
Figure 54	Editing a Channel	85
Figure 55	Group Member Information	89
Figure 56	Group Information Box	90
Figure 57	Category Information Box	91
Figure 58	Creating a New Group	92
Figure 59	New Group Displayed	93
Figure 60	Managing ePortal Permissions	99
Figure 61	Permissions: Selecting Groups	102
Figure 62	Permissions: Selecting Additional Groups	103
Figure 63	Permissions: Grant/deny	104
Figure 64	Expanded Fragment Manager Panel	108
Figure 65	Skin Selector Page	111
Figure 66	Skin Selector Dialog Box	112
Figure 67	User Preferences Toolbar	115
Figure 68	Creating a Tab	117
Figure 69	Content Subscriber	119
Figure 70	Available Channels Under Category	120

List of Figures

Figure 71	Expanded Channel Information	121
Figure 72	Skin Selector Panel	123
Figure 73	New Tab for Search Engine	125
Figure 74	Search Engine Name Under Subscriber Content	126

List of Tables

Table 1	General Writing and Display Conventions	12
Table 2	Global Security Page Table	42
Table 3	LTPA Page Table	43
Table 4	LTPA Single Signon (SSO) Page Table	44
Table 5	LDAP User Registry Configuration Page for Active Directory Table	45
Table 6	LDAP User Registry Page for Sun ONE Table	47
Table 7	LDAP User Registry for Advanced LDAP Settings Page Table	48
Table 8	Basic ePortal Components	62
Table 9	Permissions Terminology	64
Table 10	ePortal Tool Buttons	69
Table 11	Sample Group Hierarchy	100
Table 12	Sample Permissions Setup	100

Introduction

This guide explains how to install, configure, deploy, and use SeeBeyond® Integrated Composite Application Network Suite™ (ICAN) ePortal Composer, referred to as ePortal throughout this guide.

This chapter provides a brief introduction to the purpose, scope, and organization of the document plus additional useful information.

Chapter Topics

- [“Intended Audience” on page 11](#)
- [“Information and Organization” on page 11](#)
- [“Writing Conventions” on page 12](#)
- [“SeeBeyond Web Site” on page 13](#)

1.1 Intended Audience

This guide is intended for experienced computer users who have the responsibility of helping to set up and maintain a fully functioning SeeBeyond ICAN Suite system. This person must also understand any operating systems on which ePortal can be installed, for example, Windows or UNIX, and must be thoroughly familiar with Web browsers and Windows-style operations.

1.2 Information and Organization

This guide explains how to install, set up, and use ePortal to create, manage, and personalize Web channels. The guide assumes that you have installed either SeeBeyond eGate Integrator or eInsight ESB and their SeeBeyond Integration Server (including the Logical Host) or a compatible application server, for example, IBM WebSphere.

This 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 and explanation of ePortal’s features
- How to use ePortal to create and administer channels
- How to set user preferences

ePortal Licensing Information

This product includes software developed by the JA-SIG Collaborative (<http://www.ja-sig.org/>). This software is provided by the JA-SIG collaborative "as is" and any expressed or implied warranties, including, but not limited to, the implied warranties of merchantability and fitness for a particular purpose are disclaimed.

In no event shall the JA-SIG collaborative or its contributors be liable for any direct, indirect, incidental, special, exemplary, or consequential damages (including, but not limited to, procurement of substitute goods or services; loss of use, data, or profits; or business interruption) however caused and on any theory of liability, whether in contract, strict liability, or tort (including negligence or otherwise) arising in any way out of the use of this software, even if advised of the possibility of such damage.

1.3 Writing Conventions

This section explains writing conventions used throughout this document.

1.3.1 General Conventions

This document uses the general writing and display conventions shown in Table 1.

Table 1 General Writing and Display Conventions

Text	Convention	Examples
Button, file, 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, file, data entry, and code samples	Fixed font; variables shown in <i>bold italic</i> .	<code>bootstrap -p <<i>password</i>></code>
Hypertext links	Blue text	For the SeeBeyond Web site URL, see “SeeBeyond Web Site” on page 13.

1.3.2 Additional Conventions

Windows Systems

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

Path Name Separators

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

1.4 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

This chapter explains the basics of ePortal.

Chapter Topics

- [“Overview: Introduction to ePortal” on page 14](#)
- [“About Channels” on page 15](#)
- [“Authentication” on page 16](#)
- [“Web-based Portal Administration and Management” on page 16](#)

2.1 Overview: Introduction to ePortal

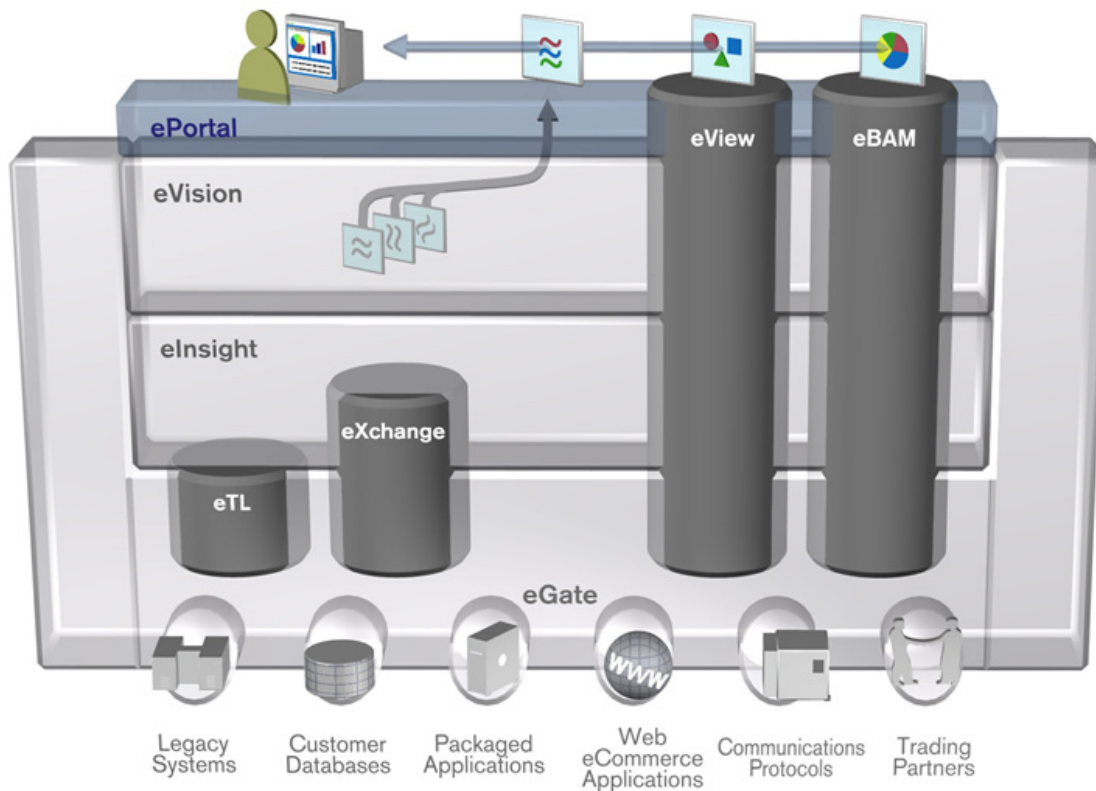
ePortal, SeeBeyond’s Web portal application program, provides a set of Web-based tools that enable the Web developer and/or administrator to create Web *portals*. A portal is a Web site that serves as a gateway for Web-based services and applications. Portals unify business information and personalize the portal experience based on a user’s profile.

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 ePortal *channels* (also called *portlets*). These channels are aggregated within the portal and collectively presented to users.

Through any of its Web channels, ePortal enables you to simultaneously view multiple eVision applications, other ICAN-generated user interfaces, and specified Web-enabled enterprise content. ePortal leverages the SeeBeyond ICAN Suite by enabling enterprise-wide access to business processes from a single point of entry, that is, a portal.

In the ICAN Suite, business processes can be monitored in real-time with the Enterprise Manager user interface, and eVision Web applications can be executed, both within their individual channels. How ePortal can be integrated within the ICAN Suite is shown in [Figure 1 on page 15](#).

Figure 1 ePortal Within the ICAN Suite



ePortal can operate seamlessly with any of the SeeBeyond applications shown in Figure 1, for example, eVision Composer, but ePortal does not require them. You can use ePortal as a stand-alone application, if desired, with or without any other SeeBeyond system or application.

ePortal can create its own internal database to facilitate its operation. You can also set ePortal to use an external database, if desired, for example, IBM DB2.

2.2 About Channels

A channel allows you to view a Web site using a URL. ePortal allows system Administrator-level personnel to create, manage, personalize, and publish channels. System Administrators can create visually appealing Web connections to applications, allowing users to perform real-time interaction with ICAN Suite’s run-time assets, or with any other URL or Web application.

With ePortal, you can create personalized channels with targeted views of business information; for example, a channel can allow a user to log onto 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.

Channels are assigned to channel *categories* and/or *fragments*. A category is a collection of channels that logically belong together. For example, channels that have a related purpose or dependency can logically be assigned to the same category. Fragments are display templates with a combination of predefined channels and layout.

2.3 Authentication

ePortal can authenticate users by way of the Enterprise Designer's Access Control List (ACL) authentication features or using Lightweight Directory Access Protocol (LDAP). Other applications in the same realm may not require a user to log on again.

The Enterprise Designer enables authentication of user IDs and passwords when users log onto ePortal. For more information, see ["Setting Up Authentication" on page 23](#).

For information on how to set up authentication using LDAP, see the appropriate LDAP documentation.

If properly configured, ePortal supports single sign-on (SSO) authentication.

2.4 Web-based Portal Administration and Management

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

ePortal provides Web-based wizards that guide the system Administrator through the process of channel configuration and management. For example, the system Administrator can:

- Create channels to be made accessible in a portal. A channel can access content from any available URL source.
- Assign any channel to a category.
- Create Web Services Remote Portlets (WSRP) channels.
- Assign specialized fragments to any group.

ePortal 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.

Installation

This chapter explains how to install, configure, and deploy ePortal, including its supporting run-time components. It also provides supporting operating systems and system requirements.

Chapter Topics

- [“Supported Operating Systems” on page 17](#)
- [“System Requirements” on page 18](#)
- [“External System Requirements” on page 18](#)
- [“Installation and Configuration Overview” on page 19](#)
- [“Prerequisites for Installation” on page 19](#)
- [“Installing ePortal Using the Enterprise Manager” on page 20](#)
- [“Configuring ePortal” on page 22](#)
- [“Deploying ePortal on the Integration Server” on page 38](#)
- [“Deploying ePortal on WebSphere” on page 40](#)

3.1 Supported Operating Systems

ePortal supports the following operating systems:

- Windows XP, Windows 2000, and Windows Server 2003
- HP Tru64 5.1A
- HP-UX 11.0 and 11i (PA-RISC)
- IBM AIX 5.1L and 5.2
- Red Hat Linux 8 (Intel) and Linux Advanced Server 2.1 (Intel)
- Sun Solaris 8 and 9

3.2 System Requirements

To use the ePortal with eGate, you need:

- eGate Logical Host.
- TCP/IP network connection.

Logical Host Requirements

When using ePortal with eGate, you must set access control authentication using eGate Integrator (Enterprise Designer) or eInsight ESB, as well as SeeBeyond Integration Server.

For complete information on eGate or eInsight ESB Logical Host system requirements, see the *SeeBeyond ICAN Suite Installation Guide*.

3.3 External System Requirements

ePortal supports WebSphere version 5.0.2 on the following servers:

- Windows 2000 Server Active Directory
- Sun ONE Directory Server version 5.2

ePortal supports Lightweight Directory Access Protocol (LDAP) versions 2.0 and 3.0 for setting access control authentication. To enable ePortal to communicate with LDAP, you need:

- Host on which the LDAP server is running.
- Port location on which the LDAP server is listening.
- Understanding of LDAP directory structure being used.

External Database

ePortal allows you to utilize an external database and supports the following type:

- IBM Database 2 (DB2) version 8.1

Java Naming and Directory Interface

ePortal uses Sun Microsystem's Java Naming and Directory Interface (JNDI) LDAP provider. This set of APIs allows a Java program to store objects and look up objects using multiple naming services in a standard manner.

The JNDI is included in the Java 2 Software Developer's Kit (SDK) version 1.4, installed as part of ePortal.

3.4 Prerequisites for Installation

This section provides lists of the application, configuration, and run-time components required for the ePortal installation.

3.4.1 Web Server

ePortal must be installed using the Enterprise Manager. You can run ePortal on a system with the SeeBeyond Integration Server or on a WebSphere application server.

To install ePortal on system running a SeeBeyond Integration Server, your site must have an active installation of eGate or eInsight ESB, as well as the ICAN Repository.

3.4.2 Database

ePortal is shipped with its own internal database. However, if you wish to employ an external database, ePortal can use DB2.

3.4.3 Application Components

You begin ePortal installation using the install file, **ePortal.sar**. To finish installing ePortal, you need the following application components:

- **ePortal.ear** (enterprise archive file)
- **search.war** (ePortal search feature Web archive file)
- **ePortal.properties** (configuration file for ePortal run-time properties)
- **db2** folder, containing the DB2 database creation script

These components are contained within **ePortal.sar**.

3.5 Installation and Configuration Overview

The general installation and configuration steps for ePortal are:

1 Application Server Installation:

- **Integration Server:**
 - ♦ **eGate or eInsight ESB Installation:** See the appropriate SeeBeyond user's guide.
- **WebSphere:**
 - ♦ **Installation:** See the appropriate WebSphere user's guide.

2 ePortal Uploading: See ["Uploading ePortal" on page 21](#) for details.

3 ePortal Downloading and Extraction: See ["Downloading and Extracting the ePortal Files" on page 21](#) for details.

- 4 **ePortal Configuration:** You can configure ePortal to run on either the SeeBeyond Integration server or WebSphere, depending on which you are using.
 - **Integration Server:**
 - A **Integration Server Setup:** See [“Setting Up the Integration Server” on page 22](#) for details.
 - B **Authentication Setup:** See [“Setting Up Authentication” on page 23](#) for details.
 - C **Editing Properties Files:** See [“Editing the eportal.properties File” on page 27](#) for details.
 - ♦ Includes configuration for an external database, for example, DB2.
 - ♦ You must unpack and repackage the **ePortal.ear** file for LDAP. See [“Unpackaging and Repackaging the ePortal.ear File” on page 28](#) for details.
 - **WebSphere:**
 - A **Configuring LDAP Authentication:** See [“Configuring ePortal for LDAP” on page 30](#) for details.
 - ♦ Includes configuration for an external database, for example, DB2.
 - ♦ You must unpack and repackage the **ePortal.ear** file for LDAP and/or an external database. See [“Unpackaging and Repackaging the ePortal.ear File” on page 28](#) for details.
 - B **Configuring WebSphere:** See [“Configuring the ePortal.ear File” on page 40](#) for details.

Important: You must perform these steps in the order listed.

Deployment

After you are done with these steps, you can proceed to the deployment. For details on ePortal’s deployment, see either of the following sections:

- [“Deploying ePortal on the Integration Server” on page 38](#)
- [“Deploying ePortal on WebSphere” on page 40](#)

3.6 Installing ePortal Using the Enterprise Manager

During the ICAN installation process, the SeeBeyond Enterprise Manager, a Web-based application, is used to select and upload ePortal (the .sar file for ePortal) from the installation CD-ROM to the Repository.

When the Repository is running on a UNIX operating system, ePortal is installed using the Enterprise Manager, on a computer running Windows connected to the Repository server.

3.6.1 Uploading ePortal

You can upload ePortal during the eGate installation or separately, if desired. If you are installing eGate and ePortal at the same time, follow the instructions in the *SeeBeyond ICAN Suite Installation Guide*, for installing eGate, and upload **ePortal.sar** after uploading **eGate.sar** or **eInsightESB.sar**.

If you are not installing eGate, the instructions for using the Enterprise Manager in the *SeeBeyond ICAN Suite Installation Guide* still apply to installing ePortal.

To install ePortal with eGate or eInsight ESB installation

- 1 During the procedures for uploading files to the Repository using the Enterprise Manager, after uploading the **eGate.sar** file, select and upload the following file:
 - ♦ **ePortal.sar**
- 2 If you are installing eGate or eInsight ESB, continue as instructed in the *SeeBeyond ICAN Suite Installation Guide*.

Note: ePortal is also supported by SeeBeyond's eInsight ESB.

To install ePortal alone

- 1 Log on to the Enterprise Manager and click the **Admin** tab.
- 2 During the procedures for uploading files to the Repository using the Enterprise Manager, select and upload the following file:
 - ♦ **ePortal.sar**

3.6.2 Downloading and Extracting the ePortal Files

- 1 After the upload is finished, click the **DOWNLOADS** tab.
- 2 On the **DOWNLOADS** page, click **ePortal**.
- 3 On the **File Download** dialog box, click **Save** and save the **ePortal.zip** file to a temporary directory.
- 4 Extract (unzip) the contents of the **ePortal.zip** file to the root directory (for example, C:\).

This operation creates the following directory:

C:\ePortal

This directory contains the following files and folder:

- ♦ **search.war** file
- ♦ **ePortal.ear** file
- ♦ **eportal.properties** file
- ♦ **db2** folder

Note: You can leave ePortal at this directory location.

UNIX Installation

UNIX installation requires the same steps as explained in these procedures. To finish installing ePortal on UNIX, take the additional step of copying the **ePortal** directory to the desired location on the UNIX machine.

You configure and deploy ePortal on UNIX in the same way as you do on Windows.

WebSphere installation

See the appropriate WebSphere user's guide and "[Deploying ePortal on WebSphere](#)" on page 40 for instructions on how to install, configure, and deploy ePortal on WebSphere.

3.7 Configuring ePortal

Configuring ePortal after initial installation requires the following operations:

- Setting up the Integration Server or WebSphere application server
- Setting up authentication features
- Editing the **eportal.properties** file
- Editing the ePortal properties files
- If you are using DB2, creating the database and running the database script.

Note: *If you are using LDAP, you must configure ePortal accordingly.*

This section explains how to do these operations.

3.7.1 Setting Up the Integration Server

If you are using the SeeBeyond Integration Server, follow the procedures in this section. If you are using the WebSphere application server, see the appropriate documentation for setting up the WebSphere server.

For complete details on how to set up an Integration Server in eGate, see the *eGate Integrator User's Guide*.

To set up the Integration Server

- 1 Using the Enterprise Designer's Environment Explorer, create an Environment under the desired Repository.

Note: *ePortal does not require a Deployment Profile.*

- 2 Create a Logical Host under that Environment.
- 3 Create an Integration Server under that Logical Host.

3.7.2 Setting Up WebSphere

If you are using the WebSphere application server to run ePortal, you must set up your authentication for ePortal using LDAP.

See the appropriate documentation for generally setting up and configuring WebSphere. Also, see the appropriate LDAP documentation for information on how to set up authentication using LDAP.

See [“Deploying ePortal on WebSphere” on page 40](#) for details on how to install, configure, and deploy ePortal on WebSphere.

3.7.3 Setting Up Authentication

Whether you are using the Integration Server or another application server, the ePortal run-time environment requires that you define the following users:

- **Administrator**
- **guest**
- **template**

These three users provide the initial channel templates at log-in. They must have the following roles:

- **Administrator: administration** (note character case) and **all** roles
- **guest** and **template: all** role

You must also mirror this same setup in LDAP, if you are using LDAP for your authentication. ePortal supports the following LDAP servers:

- Active Directory
- Sun ONE Directory

Authentication Without the Integration Server

If you are not using the Integration Server for authentication, you *must* use LDAP for that purpose. You also have to set up the **Administrator**, **guest**, and **template** users, as explained previously.

See the appropriate documentation for LDAP and your application server for details on setting up authentication without the Integration Server.

Authentication and the Integration Server

The **Administrator** user is already defined in the eGate system, but not the **administration** role. In addition, you must create the **guest** and **template** users.

You can create additional users before or after ePortal is installed and operating on a Logical Host. For the new user and role definitions to take effect after installation, you must restart the Logical Host, or while the Logical Host is running, right-click the Environment name in the **Environment Explorer**, and on the pop-up menu, click **Apply**.

You are logged off ePortal automatically and must log back on again to allow your changes to show up in the application.

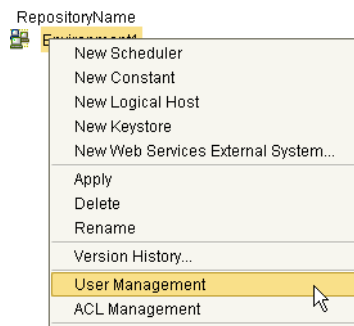
Authentication: Enterprise Designer

You can set up authentication using the Enterprise Designer and Integration Server. The rest of this section explains how to set up authentication in the Enterprise Designer's Environment.

To add the administration role to the Administrator user

- 1 In the **Environment** tree, right-click the **Environment** (the Environment name) that you created for ePortal.
- 2 On the pop-up menu, click **User Management**. See Figure 2.

Figure 2 User Management Context Menu

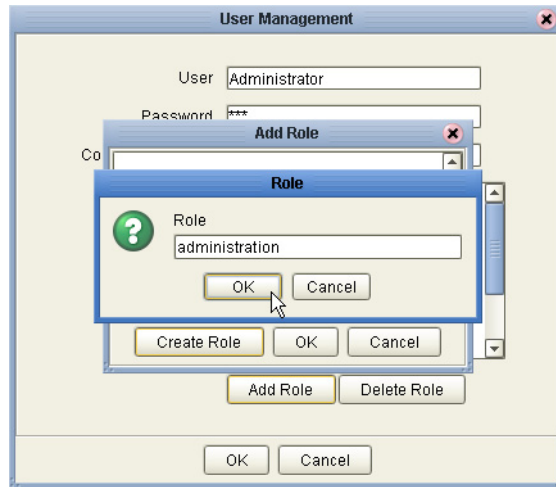


- 3 On the **User Management** dialog box, double-click **Administrator**, click **Modify**, then click **Add Role**.
- 4 To create the **administration** role, on the **Add Role** dialog box, click **Create Role**.

Note: For more information on ePortal groups and roles, and how they are used in ePortal, see [“Managing Groups” on page 87](#).

- 5 On the **Role** dialog box, type **administration**, then click **OK**. See Figure 3.

Figure 3 Adding the administration Role to the Administrator User



- 6 To add the **administration** role to the **Administrator** user, on the **User Management** dialog box, click **Add Role**.
- 7 On the **Add Role** dialog box, select **administration**, then click **OK**.
- 8 On the **Add Role** dialog box, create the **all** role, and click **OK**.
- 9 On the **User Management** dialog box, click **OK**.

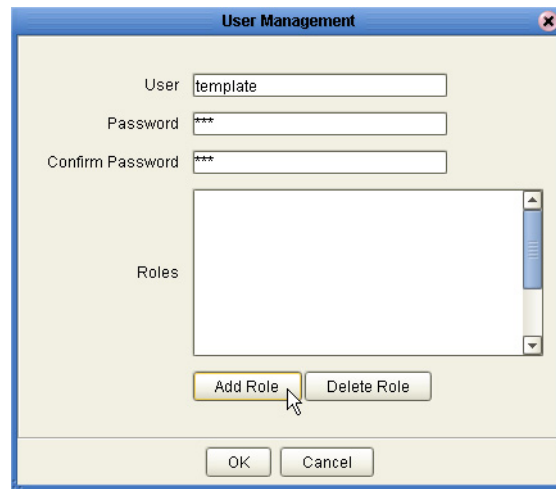
Do not close the **User Management** dialog box. You now need to add the **template** and **guest** users.

To create the template and guest users

- 1 On the **User Management** dialog box, click **Add**.
- 2 In the **User** box, type **template**.
- 3 In the **Password** box, type a password (for example **STC**), then confirm the password.

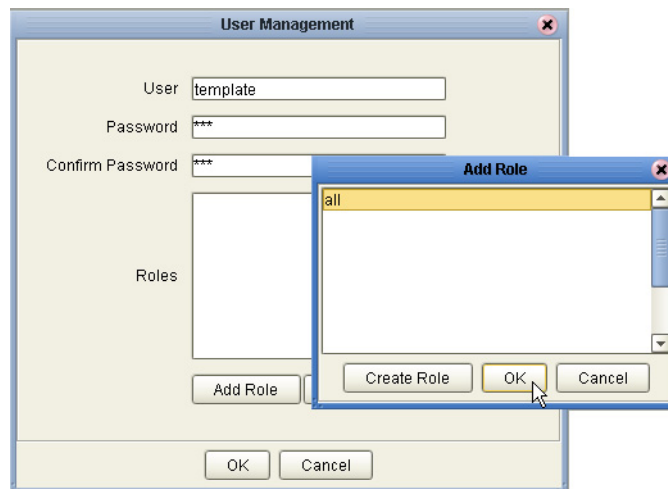
- 4 Click **Add Role**. See Figure 4.

Figure 4 Adding Users in Enterprise Designer



- 5 On the **Add Role** dialog box, select **all**, and click **OK**.
- 6 On the **User Management** dialog box, click **OK** to add the role. See Figure 5.

Figure 5 Adding Roles in Enterprise Designer

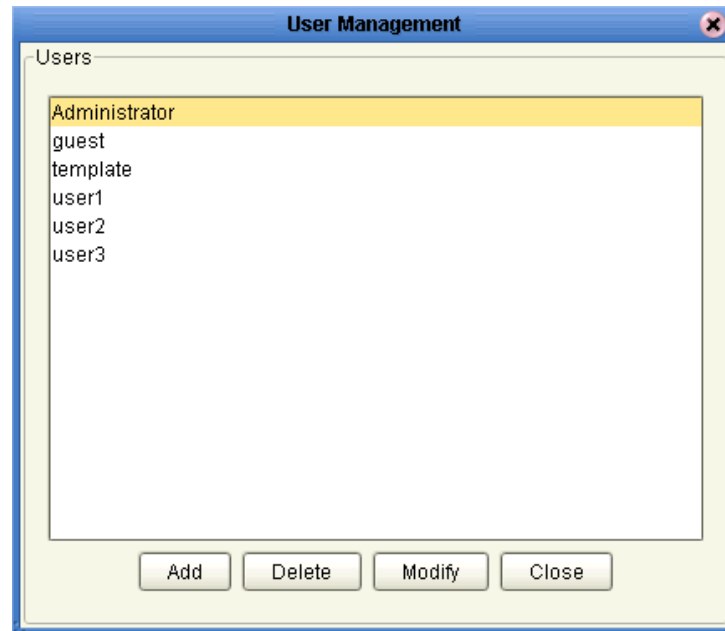


The **template** user is added to the list of users with the role **all**.

- 7 Repeat the **User Management** procedure to create the **guest** user with the role **all**.
- 8 If you wish to create additional users, you can do so. All users need the **all** role.

Figure 6 shows a sample User Management list for ePortal.

Figure 6 User Management List for ePortal



- 9 When you have finished creating the **template**, **guest**, and other desired users, on the **User Management** dialog box, click **OK**, then click **Close**.

For complete information on how to set up authentication in the Enterprise Designer, see the *eGate Integrator User's Guide*.

Authentication: Integration Server and LDAP

If you are using the Integration Server and LDAP, you must use LDAP to set up the authentication features, that is, users and roles are set up in LDAP and not using the Enterprise Designer. See the appropriate LDAP documentation for information on how to set up authentication using LDAP.

See "[Setting Integration Server Properties for LDAP](#)" on page 30 for details on how to set the Integration Server properties for LDAP.

3.7.4 Editing the eportal.properties File

To continue configuring ePortal, you must edit the application's properties file, **eportal.properties**, located in the **ePortal** directory.

To edit eportal.properties for the Integration Server

- 1 On your computer, navigate to the folder where you installed the ePortal files.
- 2 Using a text editor, open the **eportal.properties** file.
- 3 For the Integration Server, locate the following line:

```
integration_server_name=IntegrationSvr1
```

If you named the ePortal Integration Server anything *other* than the default name, change **IntegrationSvr1** to the correct name of your Integration Server.

- 4 If the ePortal internal database is used, the **use_internal_db** key value must be set to **true**. You must also provide the location of the internal database, for example:

```
use_internal_db=true
internal_db_data_directory=C:/ePortal/mydb
```

Note: ePortal creates its own internal database during the first time it runs.

- 5 If the an external database is used, the **use_internal_db** key value must be set to **false** (on Windows, the root is assumed).

- 6 Provide the location of the custom skins, for example:

```
custom_skins_directory=C:/eportal/skins
```

- 7 If the internal database tables do not exist, and you want them to be automatically created, set the **internal_db_create_tables** key value to **true**, for example:

```
internal_db_create_tables=true
```

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

- 9 For the Integration Server, using Windows, copy the edited **eportal.properties** file to the following directory on the Logical Host:

```
<drive>:\<install_directory>\logicalhost\stcis\lib\endorsed
```

Where:

- ♦ *drive* and *install_directory* are the installation drive and directory for the ICAN Suite

- 10 For WebSphere, you must copy the **eportal.properties** file to the **ePortal.jar** file.

3.7.5 Unpackaging and Repackaging the ePortal.ear File

This section explains how to unpackage and repackage the **ePortal.ear** file for an external database and/or for LDAP.

Note: Do the packaging and unpackaging operations using the command line, that is, the command box in DOS or shell environment in UNIX. If any of the **jar** commands listed in this section fails, as an alternative, you can place the **jar** executables in your path statement.

Unpackaging the ePortal.ear File

If you are using DB2 or LDAP, you must first unpackage and edit the **ePortal.ear** file.

To unpackage and edit the **ePortal.ear** file

- 1 Create a temporary directory and name it **Portal**, for example:

```
C:\Portal
```

- 2 Extract the **ePortal.ear** file to the **Portal** directory, for example:

```
jar xf ePortal.ear
```

The result of the extraction is several files, including **ePortal.war**.
- 3 Create a temporary directory inside Portal and name it **Install**, for example:

```
C:\Portal\Install
```
- 4 Extract the **ePortal.war** file to the **Install** directory, for example:

```
jar xf ePortal.war
```
- 5 Navigate to the **Install\WEB-INF\lib** directory.
- 6 Under the **WEB-INF\lib** directory, create a temporary directory and name it **temp**.
- 7 From the **Install\WEB-INF\lib** directory, extract the **ePortal.jar** file to the **temp** directory.
- 8 Delete the **ePortal.jar** file from **Install\WEB-INF\lib** directory.
- 9 Navigate to the **Install\WEB-INF\lib\temp\properties** directory.
- 10 Make the necessary changes for DB2 (see [“Configuring ePortal for an External Database” on page 30](#)) and/or LDAP (see [“Configuring ePortal for LDAP” on page 30](#)) and repackage the **ePortal.ear** file.

For the repackaging procedure, see the next section.

Repackaging the ePortal.ear file

To use the **ePortal.ear** file, you must first repackage it.

To repackage the ePortal.ear File

- 1 Navigate to the **Install\WEB-INF\lib\temp** directory.
- 2 Create the **ePortal.jar** file as follows:

```
jar cf ePortal.jar .
```
- 3 Move the **ePortal.jar** file to the **Install\WEB-INF\lib** directory.
- 4 Navigate to the **Install\WEB-INF\lib** directory.
- 5 Delete the temporary (**temp**) directory.
- 6 Navigate to the **Install** directory.
- 7 If **ePortal.war** already exists, delete it.
- 8 Create a new **ePortal.war** file as follows:

```
jar cf ePortal.war .
```
- 9 Move the **ePortal.war** file to the **Portal** directory.
- 10 Navigate to the **Portal** directory.
- 11 Delete the **Install** directory.
- 12 Create a new **ePortal.ear** file using the following command:

```
jar cf ePortal.ear .
```

After the file has been unpackaged, edited, and repackaged, you can deploy it to the desired environment, for example, the SeeBeyond Integration Server or WebSphere. See the appropriate deployment instructions in this chapter for details.

3.7.6 Configuring ePortal for an External Database

This section explains how to configure ePortal, if you want to use it with an external database, for example, DB2.

Note: Make sure that, inside the `ePortal/eportal.properties` file, the `use_internal_db=` value is set to `false` (see [“Editing the eportal.properties File” on page 27](#) for details).

To configure ePortal for DB2

- 1 Run the following DB2 database script files located in the `ePortal/db2` directory:
 - A `db.sql`
 - B `db-i18n.sql`
 - C `db-l10n.sql`

Important: You must run the scripts in this sequence.

- 2 In the `rdbm.properties` file located in the `ePortal.jar` file, provide the correct `jdbcUrl`, `jdbcUser`, and `jdbcPassword` values under the **DB2 Universal Databases V8.1** section.

Example

```
#### DB2 Universal Databases V8.1
jdbcDriver=com.SeeBeyond.jdbc.db2.DB2Driver
jdbcUrl=jdbc:seebeyond:db2://mymachine.stc.com:50000;DatabaseName=eportal
jdbcUser=db2admin
jdbcPassword=secret
```

3.7.7 Configuring ePortal for LDAP

This section explains how to set the configuration properties that allow you to run ePortal with LDAP.

Setting Integration Server Properties for LDAP

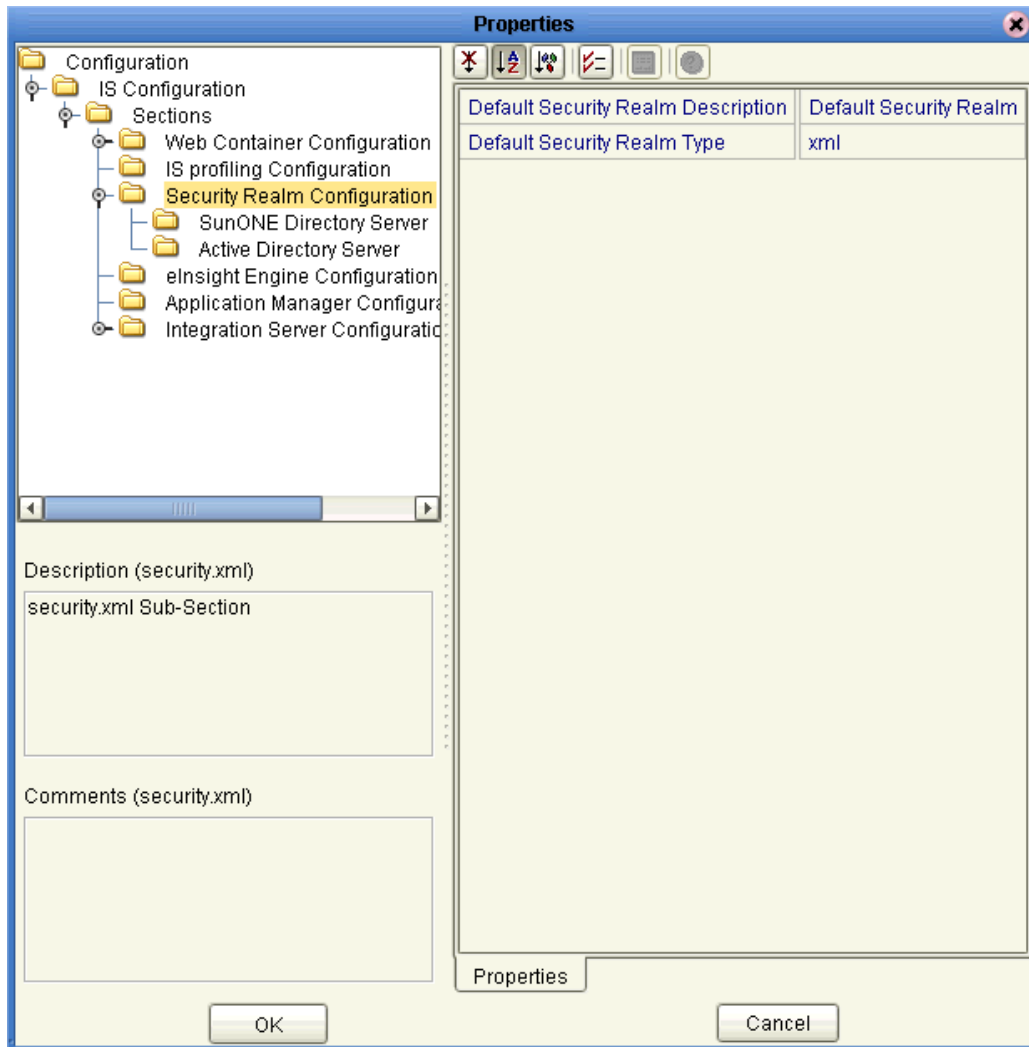
You must set the properties of the SeeBeyond Integration Server to be compatible with LDAP. To allow the Enterprise Designer to authenticate using LDAP, you must change the default security realm type to the appropriate realm type. You must also set properties for the desired realm.

To access the Integration Server properties

- 1 Click the desired Integration Server on the **Environment Explorer** in the Enterprise Designer.

- On the **Properties** dialog box, expand the following folders:
IS Configuration\Sections\Security Realm Configuration
 See [Figure 7 on page 31](#).

Figure 7 Security Realm Configuration Properties

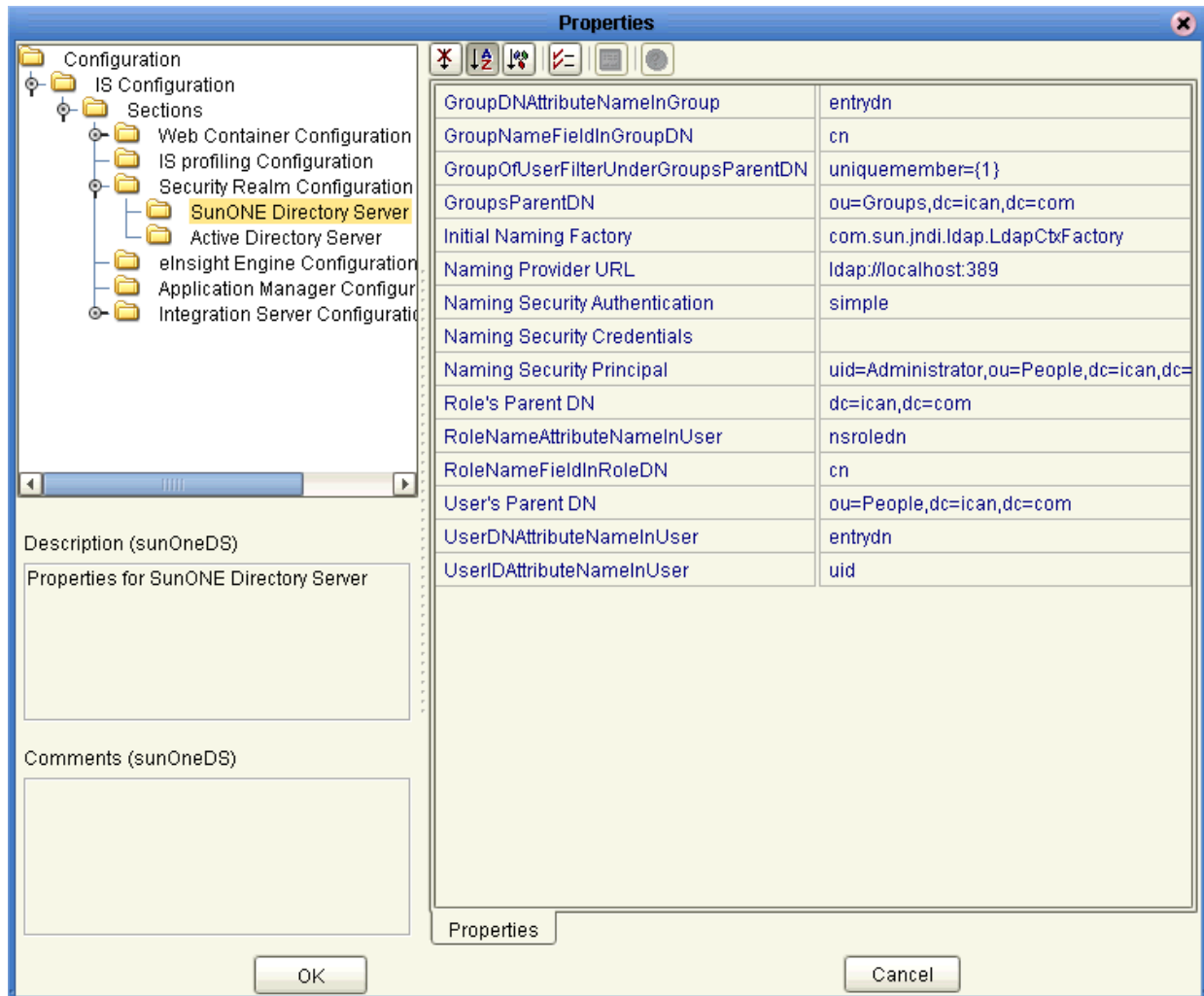


- Set the **Default Security Realm Type** to either **Sun ONE Directory Server** or **Active Directory Server**, as necessary for your system.

[Figure 7 on page 31](#) shows the **Sun ONE Directory Server** properties.

Active Directory Server has all the properties you must reset for the **Sun ONE Directory Server**. Reset them in the same way as you do for the **Sun ONE Directory Server**. See the list after [Figure 7 on page 31](#).

Figure 8 Sun ONE Directory Server Properties



For complete information on how to reset these properties for **Sun ONE Directory Server** or **Active Directory Server**, see the *eGate Integrator User's Guide*.

Note: For the Active Directory Server, make sure you set change *Guest* to *guest*.

Configuring the ePortal.ear File for LDAP

This configuration operation requires you to first unpack, edit, then repackage the the **ePortal.ear** file that contains the properties files for LDAP.

To unpack the ePortal.ear file

Follow steps 1 through 8 in the [procedure on page 28](#). Then perform the following steps:

- 1 Navigate to the **Install\WEB-INF\lib\temp\properties** directory.

- 2 In the `Install\WEB-INF\lib\temp\properties` directory, replace all the `portal.properties` file contents with all the `portal.ldapRealm.properties` file contents.
- 3 In the `Install\WEB-INF\lib\temp\groups` directory, replace all the `compositeGroupServices.xml` file contents with all the `compositeGroupServices.ldapRealm.xml` file contents.
- 4 You must configure the `security.properties` file (in the `lib\temp\properties` directory), as follows:
 - ◆ Based on your choice of an application server, you must edit the SECURITY REALM CONFIGURATION section of the `security.properties` file.
 - ◆ You must select only one choice, and the other two must be commented out. For example, the following SECURITY REALM CONFIGURATION section is configured to work with Integration Server *without* LDAP:

```
# SECURITY REALM CONFIGURATION
#
# Integration Server XML Realm
root=com.stc.eportal.security.provider.XmlRealmSecurityContextFactory
#
# Integration Server LDAP
#root=org.jasig.portal.security.provider.TrustSecurityContextFactory
#
# Websphere LDAP
#root=com.stc.eportal.security.provider.
#WebContainerSecurityContextFactory
```

To edit the LDAP properties files for Sun ONE Directory

- 1 Navigate to the `Install\WEB-INF\lib\temp\properties` directory, and open the `PersonDirs.xml` file using a text editor.
You only need to edit the Sun ONE Directory-related fields.
- 2 Provide the Sun ONE server IP address, port number, **ou**, and **dc** values in the `url` field, for example:


```
<url>ldap://192.168.1.2:389/ou=People,dc=ican,dc=com</url>
```
- 3 Provide the Sun ONE server `uidquery` value, for example:


```
<uidquery>(uid={0})</uidquery>
```
- 4 Keep `logonid`, `logonpassword`, `usercontext` as they are, commented and empty, as follows:


```
<!--
<logonid>uid=Administrator,ou=People,dc=ican,dc=com</logonid>
<logonpassword>secret</logonpassword>
-->
<logonid></logonid>
<logonpassword></logonpassword>
<usercontext></usercontext>
```
- 5 Navigate to the `Install\WEB-INF\lib\temp\groups` directory, and open the `LDAPGroupStoreConfig.xml` file using a text editor.
You only need to edit the Sun ONE Directory-related fields.

- 6 Provide the Sun ONE server IP address, port number, **ou**, and **dc** for the **url** field, for example:

```
<url>ldap://192.168.1.2:389/ou=People,dc=ican,dc=com</url>
```

- 7 Provide the Sun ONE server **keyfield** and **namefield** values.
- 8 Keep **logonid**, **logonpassword**, **usercontext** as they are, commented and empty, as follows:

```
<!--
<logonid>uid=Administrator,ou=People,dc=ican,dc=com</logonid>
<logonpassword>secret</logonpassword>
-->
<logonid></logonid>
<logonpassword></logonpassword>
<usercontext></usercontext>
```

- 9 In the **Group** section, leave filter string field unchanged, as follows:

```
<filter string="(uid=*)" />
```

Complete the following procedure only if you are doing an Active Directory installation:

To edit the LDAP properties files for Active Directory

- 1 Navigate to the **Install\WEB-INF\lib\temp\properties** directory and open the **PersonDirs.xml** file using a text editor.

You only need to edit the Active Directory-related fields.

- 2 Remove the comment from the Active Directory section before the **<url>** field and after the **</usercontext>** field, for example:

```
<url>ldap://192.168.1.2:389/CN=Users,DC=ican,DC=com</url>
<uidquery>(sAMAccountName={0})</uidquery>
<logonid>Administrator@ican.com</logonid>
<logonpassword>secret</logonpassword>
<usercontext></usercontext>
```

- 3 Provide the Active Directory server IP address, port number, **CN**, and **DC** values in the **url** field, for example:

```
<url>ldap://192.168.1.2:389/CN=Users,DC=ican,DC=com</url>
```

- 4 Provide the Active Directory server **uidquery**, **logonid**, **logonpassword**, and **usercontext** values, for example:

```
<uidquery>(uid={0})</uidquery>
<uidquery>(sAMAccountName={0})</uidquery>
<logonid>Administrator@ican.com</logonid>
<logonpassword>secret</logonpassword>
<usercontext></usercontext>
```

- 5 Comment all lines in the Sun ONE section, as follows:

```
<!--
<url>ldap://192.168.1.2:389/ou=People,dc=ican,dc=com</url>
  <uidquery>(uid={0})</uidquery>
-->
  <!--
  <logonid>uid=Administrator,ou=People,dc=ican,dc=com</logonid>
  <logonpassword>secret</logonpassword>
  -->
  <!--
</logonid></logonid>
  <logonpassword></logonpassword>
  <usercontext></usercontext>
-->
```

- 6 Navigate to the **Install\WEB-INF\lib\temp\groups** directory and open the **LDAPGroupStoreConfig.xml** file using a text editor.

You only need to edit the Active Directory-related fields.

- 7 Under the **Config** section, remove the comment from the Active Directory section before the **<url>** field and after the **</refresh-minutes>** field, as follows:

```
<url>ldap://192.168.1.2:389/CN=Users,DC=ican,DC=com</url>
<keyfield>sAMAccountName</keyfield>
<namefield>CN</namefield>
  <logonid>Administrator@ican.com</logonid>
  <logonpassword>secret</logonpassword>
  <usercontext></usercontext>
  <refresh-minutes>1</refresh-minutes>
```

- 8 Provide the Active Directory server IP address, port number, **CN**, and **DC** values in the **url** field, for example:

```
<url>ldap://192.168.1.2:389/CN=Users,DC=ican,DC=com</url>
```

- 9 Provide the Active Directory server **keyfield**, **namefield**, **logonid**, **logonpassword**, and **usercontext** values, for example:

```
<keyfield>sAMAccountName</keyfield>
<namefield>CN</namefield>
  <logonid>Administrator@ican.com</logonid>
  <logonpassword>secret</logonpassword>
  <usercontext></usercontext>
```

- 10 Under the **Config** section, comment all the Sun ONE section.

- 11 Under the **Group** section, uncomment the Active Directory filter string field, as follows:

```
<filter string="(sAMAccountName=Administrator)"/>
```

- 12 Under the **Group** section, comment the Sun ONE filter string field, as follows:

```
#<filter string="(uid=*)"/>
```

To use the **ePortal.ear** file, you must then repackage it.

To repackage the **ePortal.ear** file

See the [procedure on page 29](#).

Configuring LDAP Roles and Users

When you configure your LDAP server for ePortal, you must set up the following roles:

- **administration**
- **all**

You must also set up the following users:

- **Administrator:** Give this user the **administration** and **all** roles.
- **template:** Give this user the **all** role.
- **guest:** Give the user the **all** role.

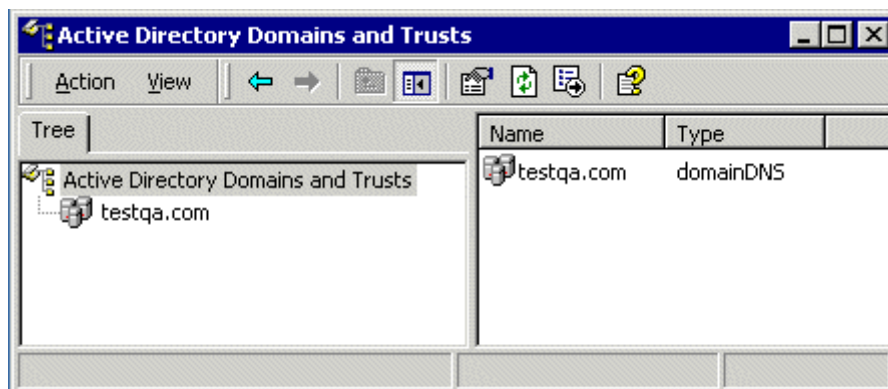
The procedures under this section explain how to do these operations with examples from Active Directory servers. Set up these roles and users for Sun ONE servers in the same way.

For more information see [“Setting Up Authentication” on page 23](#).

To set up Administrator, template, and guest roles and users

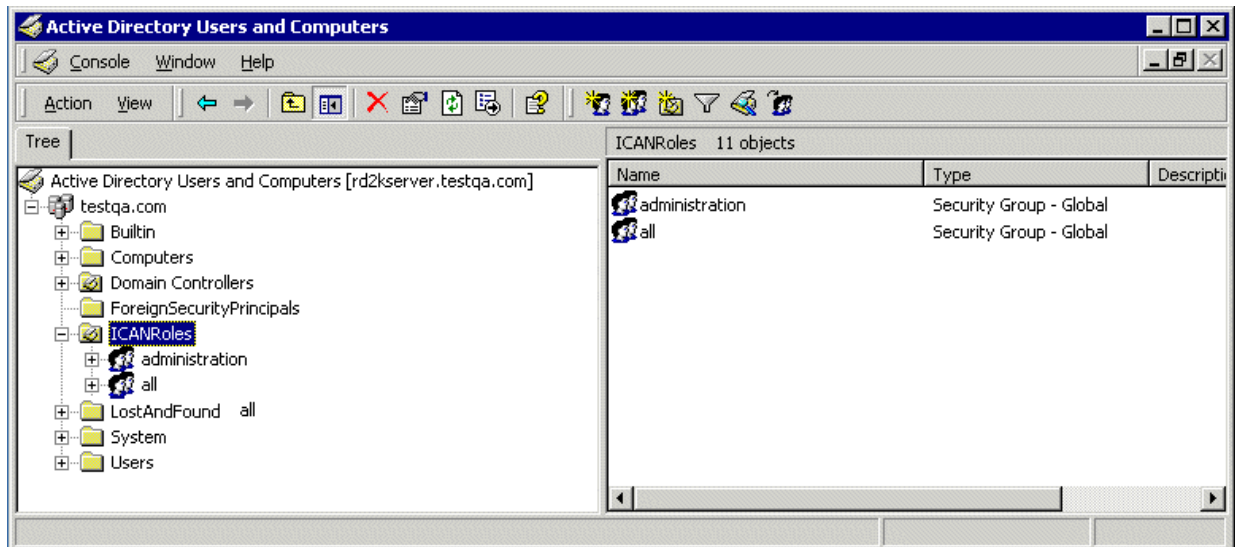
- 1 On the LDAP server, navigate to the desired domain. See Figure 9.

Figure 9 Active Directory: Domain



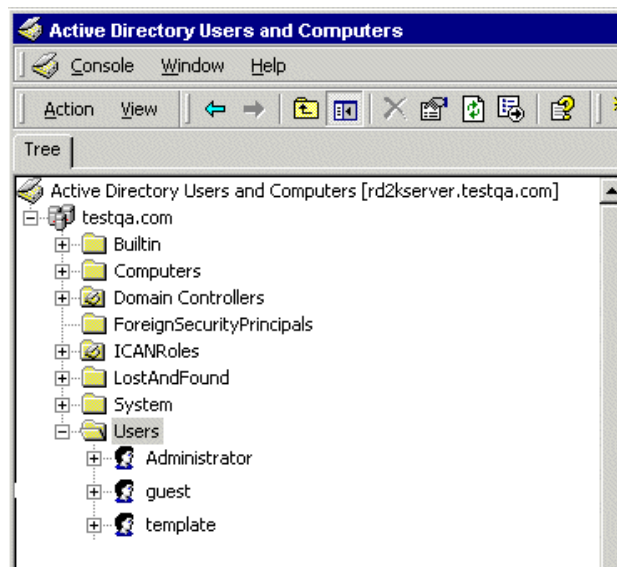
- 2 Under this domain, create a folder named, for example, **ICANRoles**.
- 3 In this folder, create the roles **administration** and **all**. See [Figure 10 on page 37](#).

Figure 10 Active Directory: Roles



- 4 Under the same domain, create the folder **Users**.
- 5 In that folder, create the users **Administrator**, **guest**, and **template**. See Figure 11.

Figure 11 Active Directory: LDAP Users



- 6 Assign the roles to users, as explained under **“Configuring LDAP Roles and Users”** on page 36.

3.8 Deploying ePortal on the Integration Server

ePortal can run under one of the following environments:

- SeeBeyond Integration Server, authenticating using either the Enterprise Designer or LDAP
- WebSphere application server authenticating using LDAP only

To deploy ePortal under the Integration Server environment, you must use the Enterprise Designer. For complete instructions on how to use the Enterprise Designer, see the *eGate Integrator User's Guide* and *eGate Integrator System Administration Guide*.

Running the Logical Host on Windows

Before you can deploy ePortal on the Integration Server, you must first start the Logical Host. See the *eGate Integrator User's Guide* for complete instructions on how to run the Logical Host.

This is the default deployment.

Deploying on the WebSphere application server

If you are using the WebSphere application server to run ePortal, you must deploy ePortal using WebSphere. See [“Deploying ePortal on WebSphere” on page 40](#) for details.

3.8.1 Deploying ePortal Files

Deploy the ePortal application files as follows:

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

```
<drive>:\<install_directory>\logicalhost\stcis\deploy\  
new\<integration_server>
```

Where:

- ♦ *drive* and *install_directory* are the installation drive and directory for the ICAN Suite.
- ♦ *integration_server* is the name of your Integration Server.

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

- 2 Watch the **ePortal.ear** and **search.war** files in the directory.

If you completed all of the preceding procedures correctly, the two files disappear, one after the other. Depending on the host machine speed, this action may take a few moments.

3.8.2 Validating the Installation

This procedure verifies that the ePortal application, the Logical Host, and the ePortal database are all running. In addition, it confirms that ePortal has been successfully installed, configured, and deployed.

To validate the ePortal installation

- 1 Check the following directories:

```
<drive>:\<install_directory>\logicalhost\stcis\repository\  
applications\<integration_server>\EAR
```

```
<drive>:\<install_directory>\logicalhost\stcis\repository\  
applications\<integration_server>\WAR
```

Where:

- ♦ *drive* and *install_directory* are the installation drive and directory for the ICAN Suite.
- ♦ *integration_server* is the name of your SeeBeyond Integration Server.

This is the deployed location of the **ePortal.ear** and **search.war** files. If these files are not present, repeat the installation and/or troubleshoot as necessary.

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

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

Where:

- ♦ *hostname* is the name of the host machine
- ♦ *port* is the port number assigned to the Integration Server on the Logical Host, for example:

```
http://localhost:18004/ePortal/
```

The port 18004 is the default port number for the Integration Server.

In a successful installation, the ePortal **Login** page appears.

- 4 On the **login** page, log on as **Administrator** as follows:
 - ♦ User name: **Administrator**
 - ♦ Password: **STC**

If you want to change the ePortal port number, you can do so using the Integration Server properties dialog box in the Enterprise Designer.

To change the ePortal port number

- 1 On the Enterprise Designer's **Environment Explorer**, open the desired Integration Server's properties sheet.
- 2 Expand the folders in the left pane as follows:

```
IS Configuration\Sections\Web Container Configuration\  
Web Server Configurations\Default Web Server
```

- 3 In the right pane, under **Connector Port**, enter the desired port number.
- 4 Close the properties dialog box.

See [“Setting Integration Server Properties for LDAP” on page 30](#) for more information on this properties sheet.

3.8.3 Running ePortal

To run ePortal in subsequent sessions

- 1 Start the Logical Host.
- 2 Log on to ePortal. See [“Validating the Installation” on page 39](#).

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

3.9 Deploying ePortal on WebSphere

This section explains how to configure and deploy ePortal on the WebSphere application server (including the Sun ONE Directory and Active Directory servers). Authentication on WebSphere requires LDAP, so the configuration instructions include setting LDAP properties.

3.9.1 Configuring the ePortal.ear File

This section explains how to modify the `ePortal.ear` file to make it compatible with WebSphere.

To configure the `ePortal.ear` file for WebSphere

- 1 Complete the [procedure on page 28](#) (unpackaging the file).
- 2 Modify the `ePortal.properties` file and make any needed configuration changes.
- 3 Make sure that the location of the database is explicit, for example:

```
C:\edesigner\ePortal\data_db
```
- 4 Copy the modified `ePortal.properties` file to the `Install\WEB-INF\lib\temp` directory.
- 5 Complete the [procedure on page 29](#) (repackaging the file).

The rest of this section explains how to configure and deploy ePortal on the WebSphere application server.

3.9.2 Configuring and Deploying ePortal on WebSphere

This section explains how to configure security and deploy ePortal (including the search engine) on the WebSphere application server using the WebSphere Administrative Console.

WebSphere Patch

The **kython.jar** library file in WebSphere has only some (but not all) of the **org.apache.oro** classes required to run ePortal. Therefore, you must replace this file as explained under the following procedure:

To apply the WebSphere patch

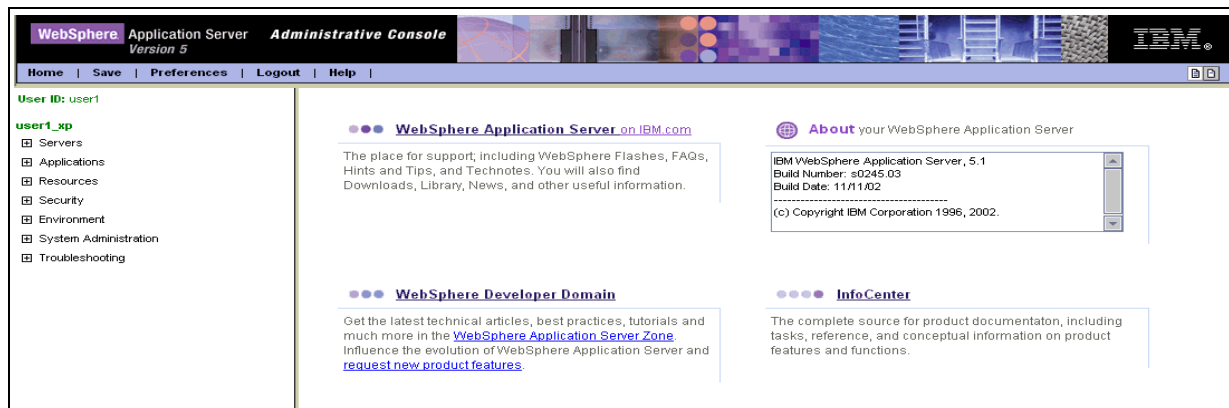
- 1 Move the WebSphere **kython.jar** file (under **WebSphere\AppServer\lib**) to a safe location.
- 2 Follow the steps 1 through 4 under **“Unpackaging the ePortal.ear File” on page 28** then navigate to the **Install** folder.
- 3 Copy the **WEB-INF\lib\jakarta-oro-2.0.8.jar** file to the **WebSphere\AppServer\lib** folder.
- 4 Copy the **WEB-INF\lib\WebSphere_Patch\kython_no_oro.jar** file to the **WebSphere\AppServer\lib** folder.

Configuring ePortal Security

To configure ePortal security on WebSphere

- 1 Make sure that the WebSphere server is running.
- 2 Start the WebSphere Administrative Console. See Figure 12.

Figure 12 Administrative Console Page



- 3 Click the **Security** link in the left pane to expand the link and list its contents.

- Click the **Global Security** link and configure the parameters on the resulting page as shown in Figure 13 and Table 2.

Figure 13 Global Security Page

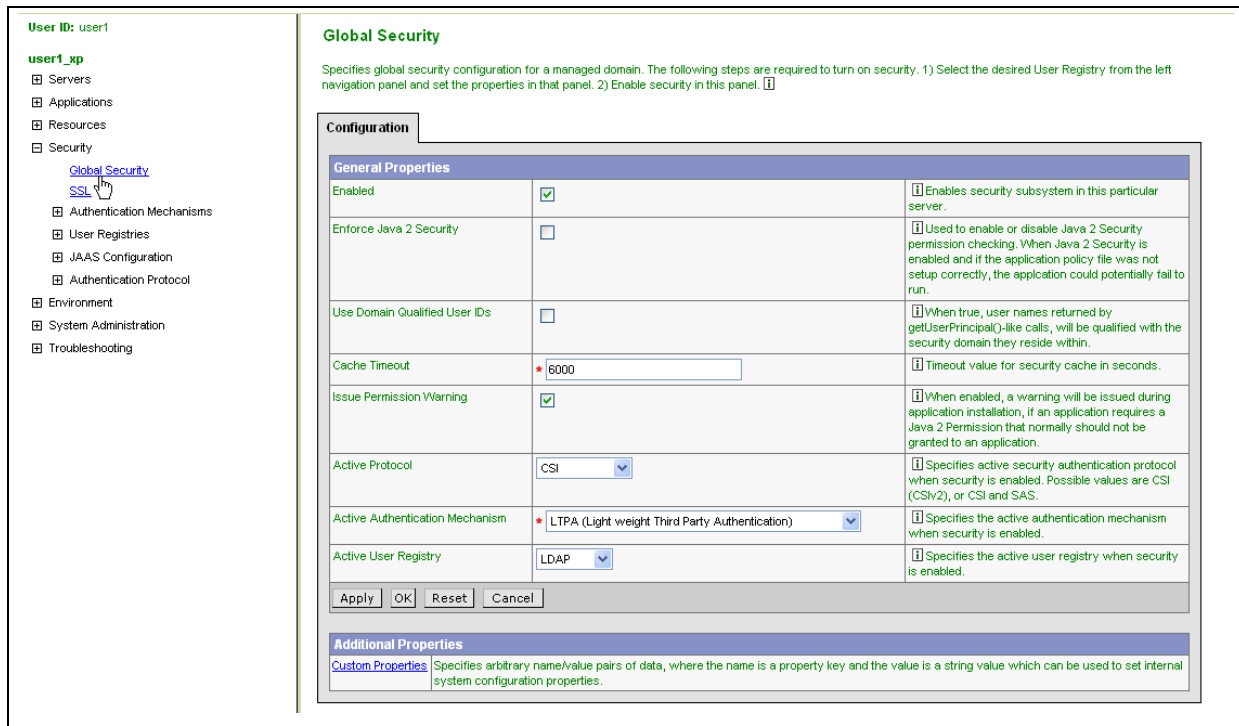


Table 2 shows the entries for this page in detail.

Table 2 Global Security Page Table

Property	Required Value
Enabled	Check the box.
Enforce Java 2 Security	Do not check the box.
Use Domain Qualified User IDs	Do not check the box.
Cache Timeout	Enter the desired time-out in seconds.
Issue Permission Warning	Check the box.
Active Protocol	Choose CSI from the drop-down list.
Active Authentication Mechanism	Choose LTPA from the drop-down list.
Active User Registry	Choose LDAP from the drop-down list.

Note: For more information on each property, see the detailed description in the right column of the page's information table.

- Click the **LTPA** link and configure the parameters on the resulting page as shown in Figure 14 and [Table 3 on page 43](#).

Figure 14 LTPA Page

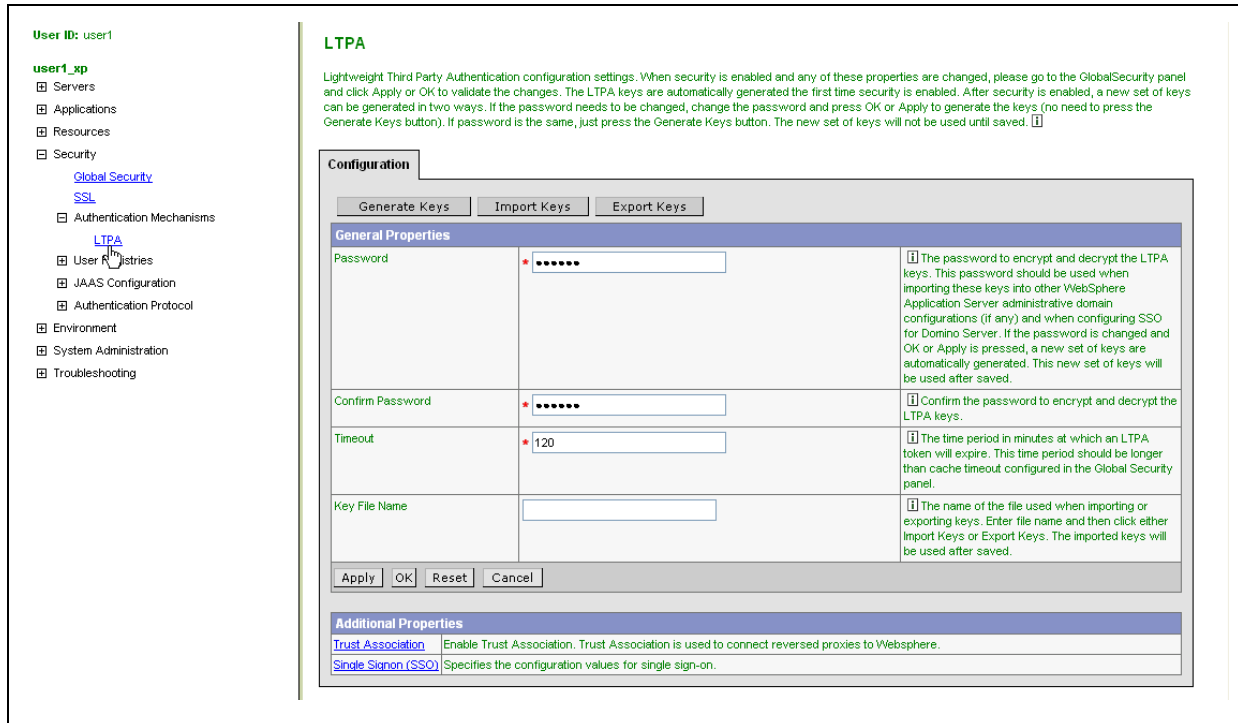


Table 3 shows the entries for this page in detail.

Table 3 LTPA Page Table

Property	Required Value
Password	Enter your personal encryption password.
Confirm Password	Re-enter the password.
Timeout	Enter the desired time-out in minutes.
Key File Name	You may enter the file name used for importing or exporting security keys.

- Click **OK** or **Apply** to save and validate your changes.

- 7 Select the **LTPA Single Signon (SSO)** option and configure the parameters on the resulting page as shown in Figure 15 and Table 4.

Figure 15 LTPA Single Signon (SSO) Page

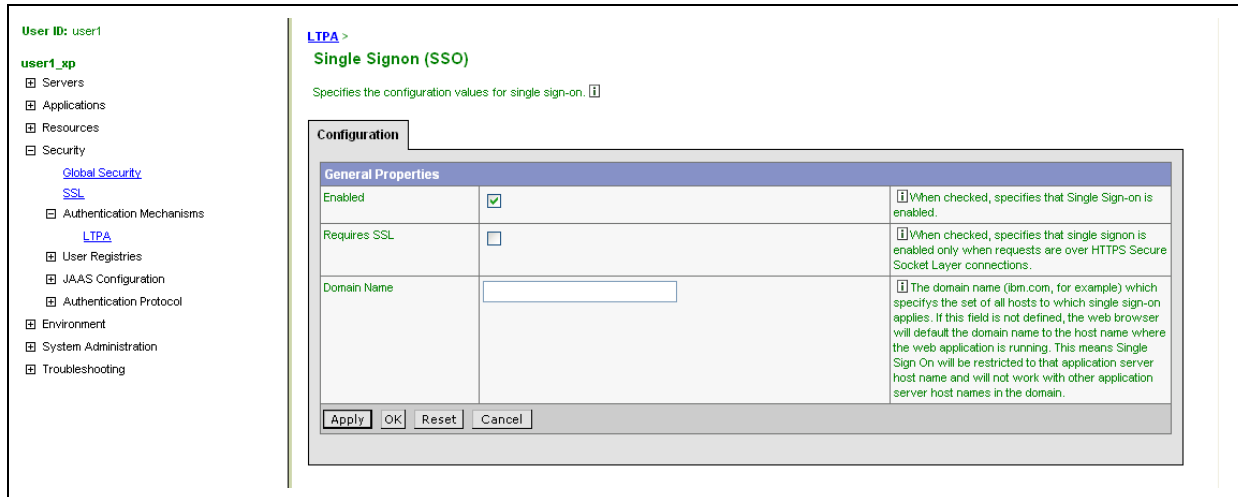


Table 4 shows the entries for this page in detail.

Table 4 LTPA Single Signon (SSO) Page Table

Property	Required Value
Enabled	Check the box.
Requires SSL	Do not check the box.
Domain Name	You may enter the desired domain name.

- 8 Click the **LDAP** link and configure the parameters on the resulting **LDAP User Registry Configuration** page as follows:
 - ◆ For **Active Directory** configure the parameters as shown in Figure 16 with explanations in Table 5.

Figure 16 LDAP User Registry Configuration Page for Active Directory

The screenshot shows the 'LDAP User Registry' configuration page. On the left is a navigation tree with 'LDAP' selected. The main area is titled 'LDAP User Registry' and contains a 'Configuration' section with a table of settings. Below this is an 'Additional Properties' section with links for 'Advanced LDAP Settings' and 'Custom Properties'.

General Properties		
Server User ID	user1	The user ID under which the server will execute (for security purposes).
Server User Password	*****	The password corresponding to the serverid.
Type	Active_Directory	The type of LDAP server being connected to.
Host	10.18.73.140	Specifies LDAP server host name.
Port	389	Specifies LDAP server port.
Base Distinguished Name (DN)	dc=testqa,dc=com	The base distinguished name of the directory service, indicating the starting point for LDAP searches of the directory service.
Bind Distinguished Name (DN)	Administrator@testqa.com	The distinguished name for application server to use to bind to the directory service.
Bind Password	*****	The password for the application server to use to bind to the directory service.
Search Timeout	120	Specifies the timeout value in seconds for an LDAP server to respond before aborting a request.
Reuse Connection	<input checked="" type="checkbox"/>	Should set to checked by default to reuse the LDAP connection. Set to unchecked only in rare situations where a router is used to spray requests to multiple LDAP servers and when the router does not support affinity.
Ignore Case	<input checked="" type="checkbox"/>	When set to true, a case insensitive authorization check will be performed.
SSL Enabled	<input type="checkbox"/>	Whether secure socket communications is enabled to the LDAP server. When enabled, the LDAP Secure Socket Layer settings are used if specified.
SSL Configuration	user1_xp/DefaultSSLSettings	Specifies the LDAP SSL Settings configuration setting.

Buttons: Apply, OK, Reset, Cancel

Additional Properties

- [Advanced LDAP Settings](#): Advanced LDAP User Registry settings are used when users and groups reside in an external LDAP directory. When security is enabled and any of these properties are changed, please go to the GlobalSecurity panel and click Apply or OK to validate the changes.
- [Custom Properties](#): A set of arbitrary user registry configuration properties whose names are specific to a given type of pluggable registry.

Table 5 shows the entries for **Active Directory** in detail.

Table 5 LDAP User Registry Configuration Page for Active Directory Table

Property	Required Value
Server User ID	Enter the user name for your Active Directory server.
Server User Password	Enter the password for your Active Directory server.
Type	Select the Active Directory option from the drop-down list.
Host	Enter the host name or IP address of your Active Directory server.
Port	Enter you Active Directory server's port number.
Base Distinguished Name (DN)	Enter the base DN of the Active Directory directory service, for example, dc=testqa,dc=com .

Table 5 LDAP User Registry Configuration Page for Active Directory Table (Continued)

Property	Required Value
Bind Distinguished Name (DN)	Enter the bind DN to bind the Active Directory directory service, for example Administrator@testqa.com .
Bind Password	Enter the password for binding the Active Directory directory service.
Search Timeout	Enter the desired time-out in seconds.
Reuse Connection	Check the box.
Ignore Case	Check the box.
SSL Enabled	Do not check the box.
SSL Configuration	Select the name of your Active Directory SSL configuration settings from the drop-down list.

- ◆ For **Sun ONE**, configure the parameters as shown in Figure 17 with explanations in [Table 6 on page 47](#).

Figure 17 LDAP User Registry Configuration Page for Sun ONE

User ID: user1

user1_xp

- ☐ Servers
- ☐ Applications
- ☐ Resources
- ☐ Security
 - Global Security
 - SSL
 - ☐ Authentication Mechanisms
 - ☐ User Registries
 - Local OS
 - LDAP
 - Custom
 - ☐ JAAS Configuration
 - ☐ Authentication Protocol
- ☐ Environment
- ☐ System Administration
- ☐ Troubleshooting

LDAP User Registry

LDAP User Registry settings are used when users and groups reside in an external LDAP directory. When security is enabled and any of these properties are changed, please go to the GlobalSecurity panel and click Apply or OK to validate the changes. ⓘ

Configuration

General Properties		
Server User ID	* user1	ⓘ The user ID under which the server will execute (for security purposes).
Server User Password	*	ⓘ The password corresponding to the serverid.
Type	Custom	ⓘ The type of LDAP server being connected to.
Host	* 10.18.73.140	ⓘ Specifies LDAP server host name.
Port	489	ⓘ Specifies LDAP server port.
Base Distinguished Name (DN)	dc=testqa,dc=com	ⓘ The base distinguished name of the directory service, indicating the starting point for LDAP searches of the directory service.
Bind Distinguished Name (DN)	uid=Administrator,ou=People,dc=test	ⓘ The distinguished name for application server to use to bind to the directory service.
Bind Password	ⓘ The password for the application server to use to bind to the directory service.
Search Timeout	120	ⓘ Specifies the timeout value in seconds for an LDAP server to respond before aborting a request.
Reuse Connection	<input checked="" type="checkbox"/>	ⓘ Should set to checked by default to reuse the LDAP connection. Set to unchecked only in rare situations where a router is used to spray requests to multiple LDAP servers and when the router does not support affinity.
Ignore Case	<input checked="" type="checkbox"/>	ⓘ When set to true, a case insensitive authorization check will be performed.
SSL Enabled	<input type="checkbox"/>	ⓘ Whether secure socket communications is enabled to the LDAP server. When enabled, the LDAP Secure Socket Layer settings are used if specified.
SSL Configuration	user1_xp/DefaultSSLSettings	ⓘ Specifies the LDAP SSL Settings configuration setting.

Apply OK Reset Cancel

Additional Properties

[Advanced LDAP Settings](#) Advanced LDAP User Registry settings are used when users and groups reside in an external LDAP directory. When security is enabled and any of these properties are changed, please go to the GlobalSecurity panel and click Apply or OK to validate the changes.

[Custom Properties](#) A set of arbitrary user registry configuration properties whose names are specific to a given type of pluggable registry.

Table 6 shows the entries for **Sun ONE** in detail.

Table 6 LDAP User Registry Page for Sun ONE Table

Property	Required Value
Server User ID	Enter the user name for your Sun ONE server.
Server User Password	Enter the password for your Sun ONE server.
Type	Select the Custom option from the drop-down list.
Host	Enter the host name or IP address of your Sun ONE server.
Port	Enter you Sun ONE server's port number.
Base Distinguished Name (DN)	Enter the base DN of the Sun ONE directory service, for example, dc=testqa,dc=com.
Bind Distinguished Name (DN)	Enter the bind DN to bind the Sun ONE directory service, for example, uid=Administrator,ou=People,dc=testqa,dc=com.
Bind Password	Enter the password for binding the Sun ONE directory service.
Search Timeout	Enter the desired time-out in seconds.
Reuse Connection	Check the box.
Ignore Case	Check the box.
SSL Enabled	Do not check the box.
SSL Configuration	Select the name of your Sun ONE SSL configuration settings from the drop-down list.

- 9 When you are finished, click **OK** or **Apply**.

10 Configure the Advanced LDAP Settings as shown in Figure 18 and Table 7.

Figure 18 LDAP User Registry for Advanced LDAP Settings Page

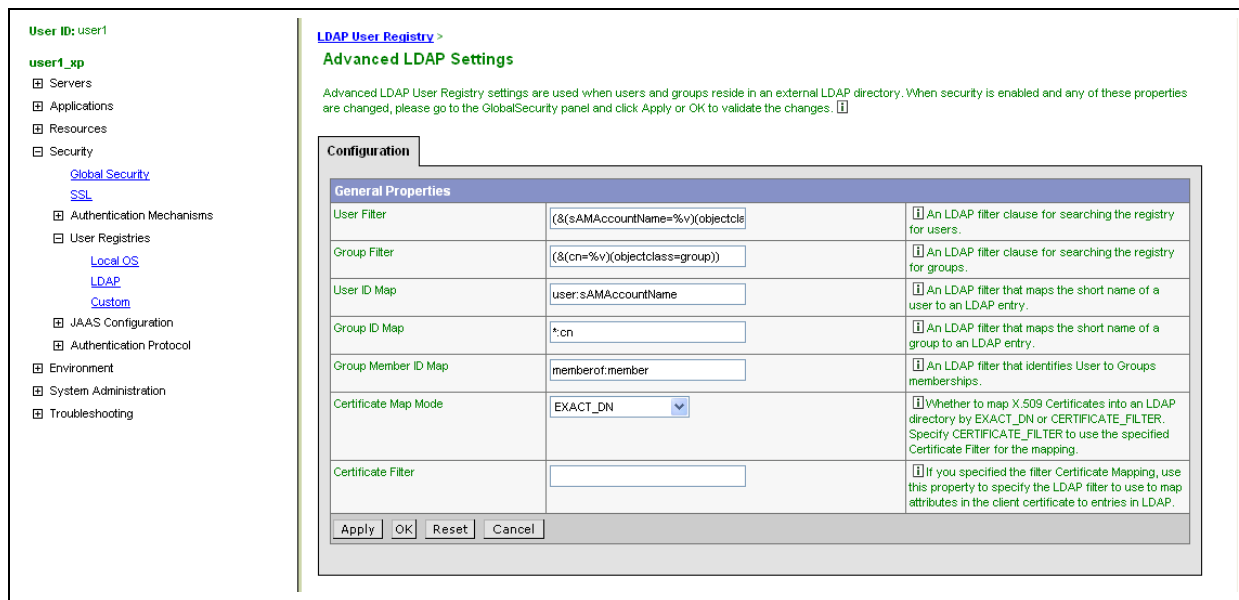


Table 7 shows the entries for this page in detail.

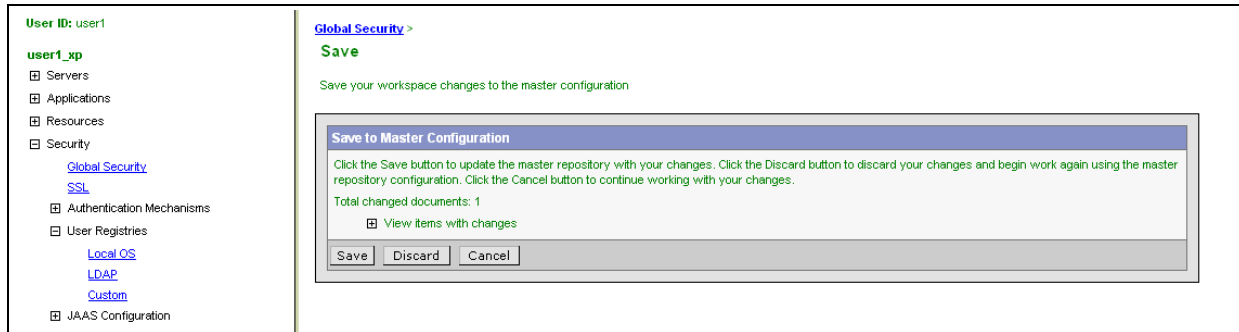
Table 7 LDAP User Registry for Advanced LDAP Settings Page Table

Property	Required Value
User Filter	Enter the name of an LDAP filter clause to search for users, for example, (&(sAMAccountName=%v)(objectclass=user)) .
Group Filter	Enter the name of an LDAP filter clause to search for groups, for example, (&(cn=%v)(objectclass=group)) .
User ID Map	Enter the name of an LDAP filter that maps the short name of a user to an LDAP entry, for example, sAMAccountName .
Group ID Map	Enter the name of an LDAP filter that maps the short name of a group to an LDAP entry.
Group Member ID Map	Enter the name of an LDAP filter that identifies a user to group memberships.
Certificate Map Mode	Select the certificate filter to use for mapping, from the drop-down list.
Certificate Filter	If you specified filter certificate mapping, enter the name of the LDAP filter to use for mapping.

11 When you are finished, click **OK** or **Apply**.

- Click the **Global Security** link again, then click **Save** to save your configuration. See Figure 19.

Figure 19 Global Security Page (Save)



You have now finished setting up security for WebSphere.

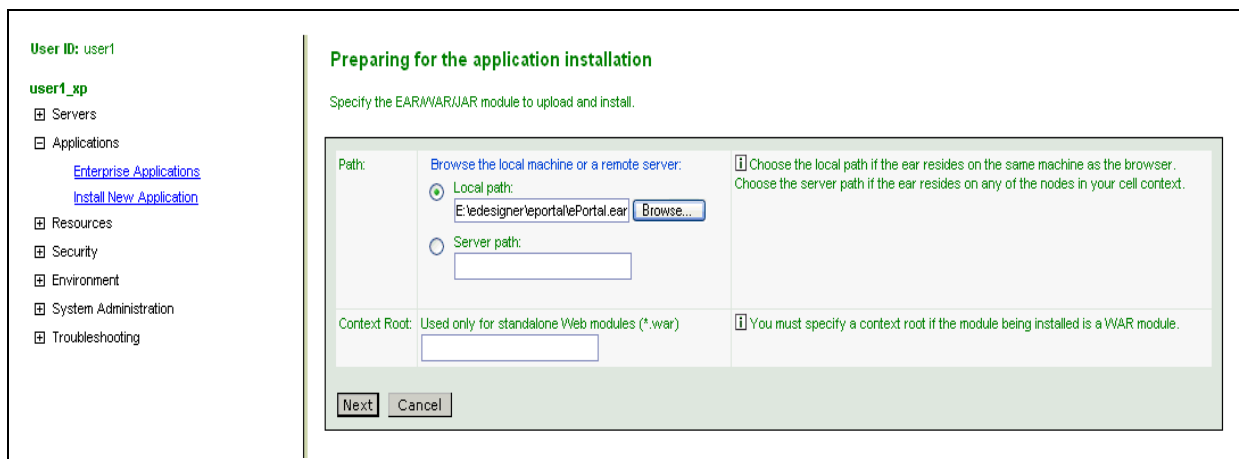
Deploying ePortal on WebSphere

To deploy ePortal on WebSphere

- Make sure that the WebSphere server is running.
- Start the WebSphere Administrative Console.
- In left pane of the Administrative Console home page, click the **Install New Application** link.

The Preparing for the application installation page appears. See Figure 20.

Figure 20 Preparing for the Application Installation Page



- 4 Under **Path**, select **Local Path** and browse to the location of the **ePortal.war** file, then click **Open**.
- 5 Under **Context Root**, type **/ePortal** and click **Next**, to go to the next page.
- 6 Check the **Generate Default Binding** check box, then click **Next**. See Figure 21.

Figure 21 Generate Default Binding Page

Preparing for the application installation
You can choose to generate default bindings and mappings. ⓘ

Generate Default Bindings:

Override: Do not override existing bindings ⓘ Generate default bindings for existing entries and over write them.
 Override existing bindings

Virtual Host: Do not default virtual host name for web modules ⓘ The virtual host to be used for this web module.
 Default virtual host name for web modules:

Specific bindings file: ⓘ Optional location of pre-defined bindings file.

- 7 Keep **Step 1** as is and click **Next**. See Figure 22.

Figure 22 Deploying on WebSphere: Step 1 Page

Install New Application
Allows installation of Enterprise Applications and Module

→ **Step 1: Provide options to perform the installation**

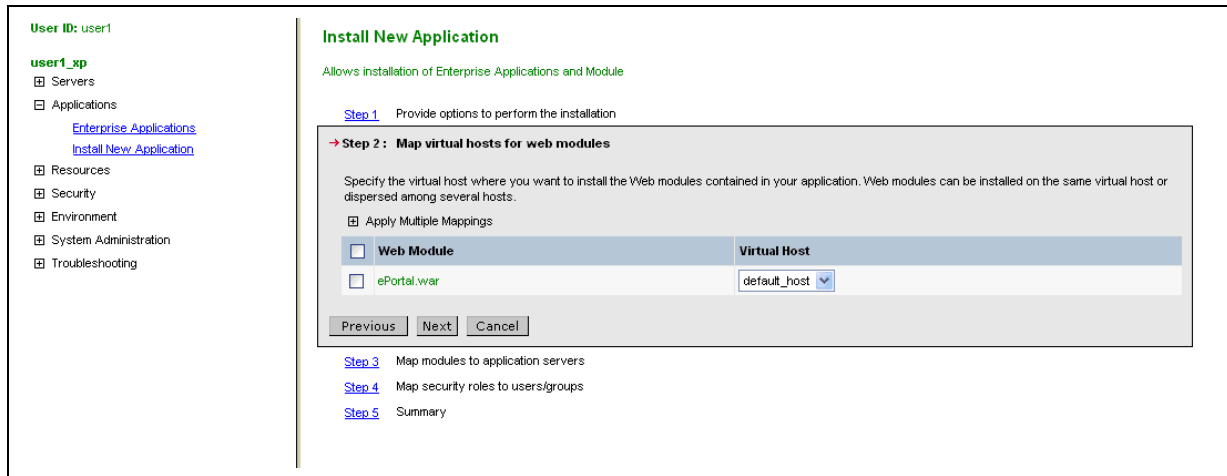
Specify the various options available to prepare and install your application.

AppDeployment Options	Enable
Pre-compile JSP	<input type="checkbox"/>
Directory to Install Application	<input type="text"/>
Distribute Application	<input checked="" type="checkbox"/>
Use Binary Configuration	<input type="checkbox"/>
Deploy EJBs	<input type="checkbox"/>
Application Name	<input type="text" value="ePortal"/>
Create MBeans for Resources	<input checked="" type="checkbox"/>
Enable class reloading	<input type="checkbox"/>
Reload Interval	<input type="text"/>

[Step 2](#) Map virtual hosts for web modules
[Step 3](#) Map modules to application servers
[Step 4](#) Map security roles to users/groups
[Step 5](#) Summary

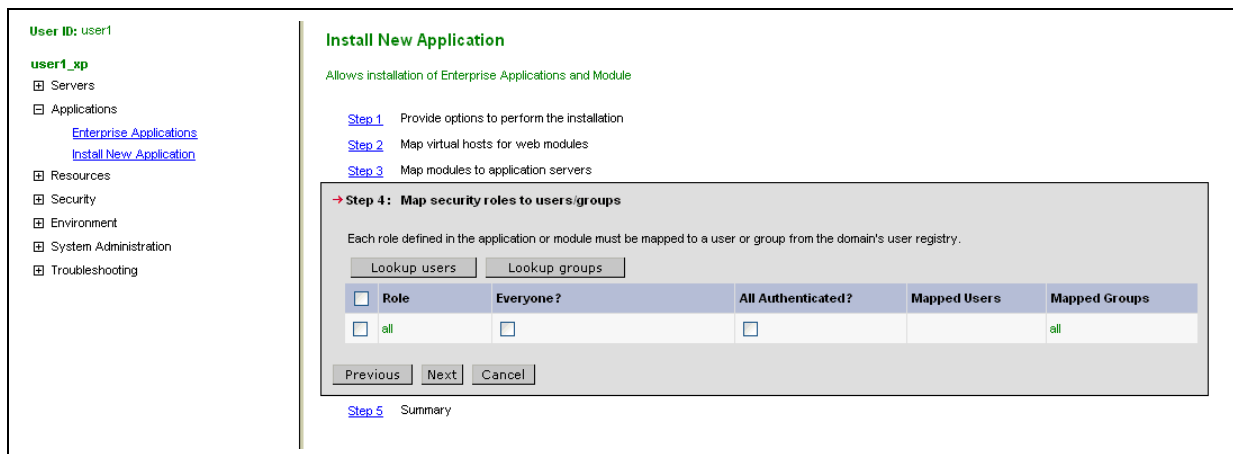
- 8 Under **Step 2**, check the box next to **ePortal.war** and click **Next**. See Figure 23.

Figure 23 Deploying on WebSphere: Step 2 Page



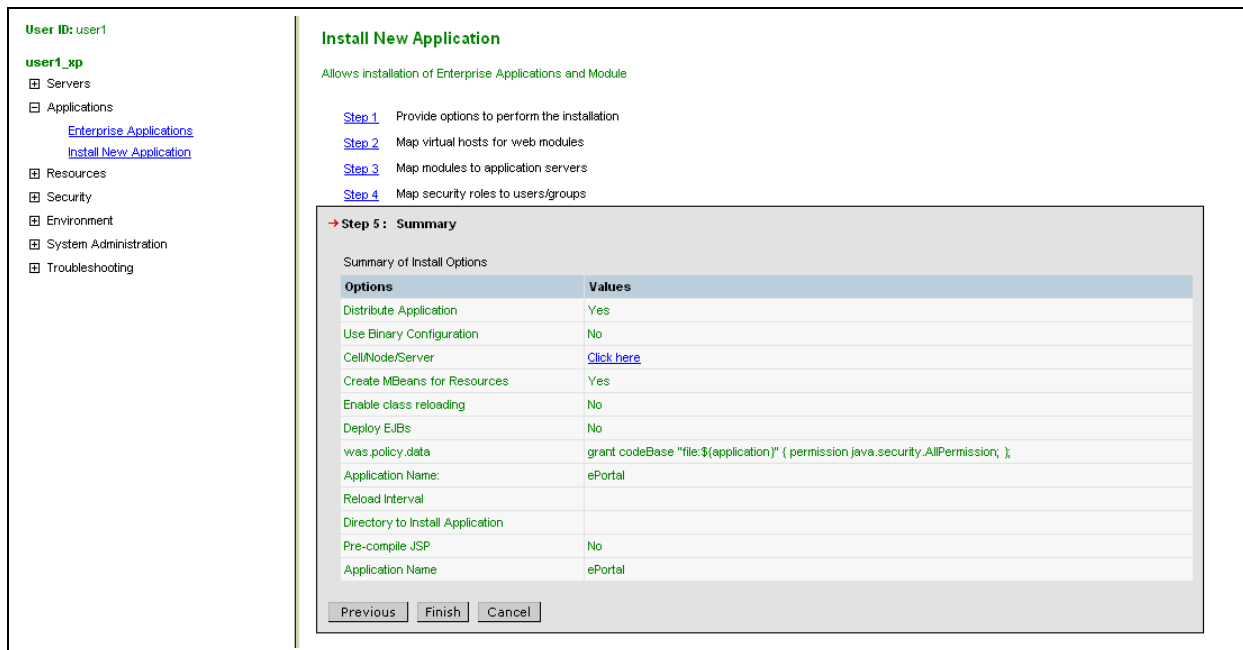
- 9 Under **Step 3**, check the box next to **ePortal.war** and click **Next**. See Figure 24.

Figure 24 Deploying on WebSphere: Step 3 Page



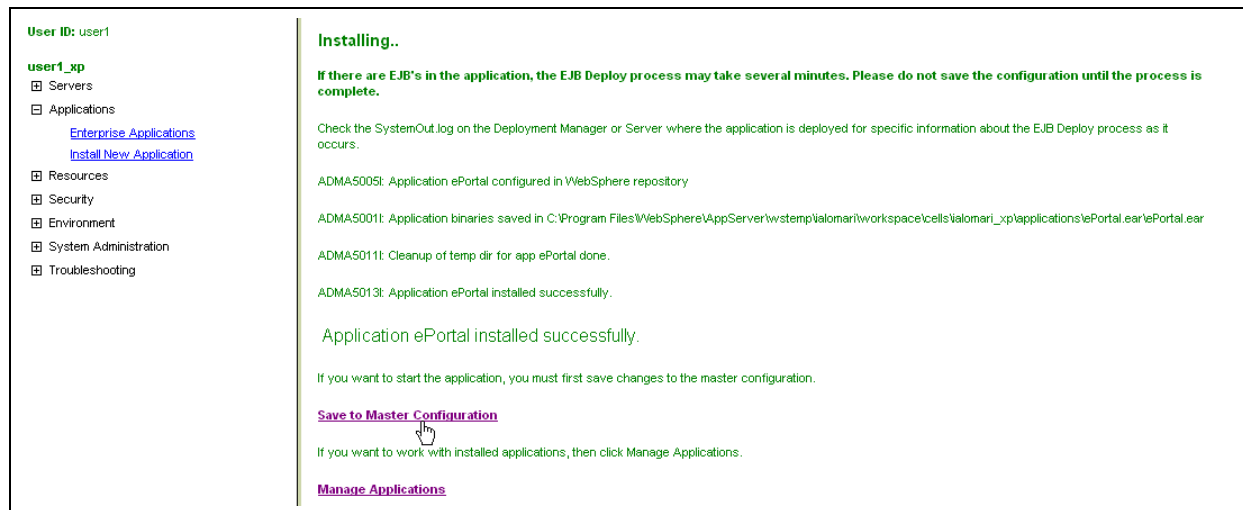
10 Keep **Step 4** as is and click **Finish**. See Figure 25.

Figure 25 Deploying on WebSphere: Step 4 Page



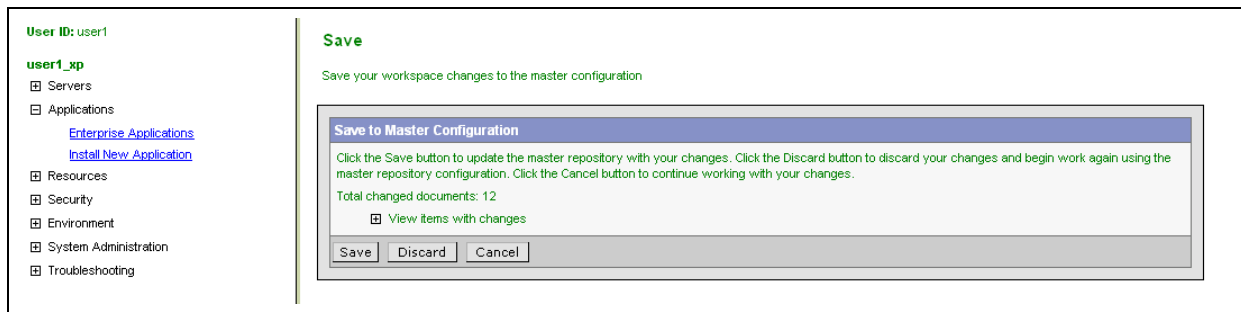
11 Click the **Save To Master Configuration** link. See Figure 26.

Figure 26 Save To Master Configuration



The **Save** page appears. See Figure 27.

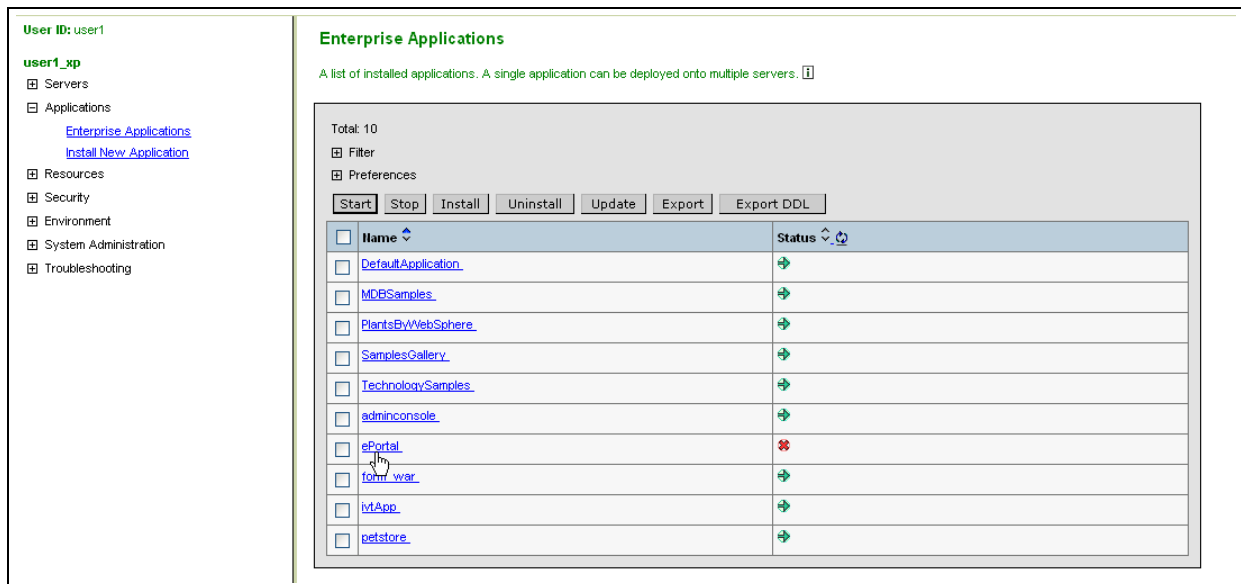
Figure 27 Save Page



12 Click **Save**.

The Enterprise Applications page appears. See Figure 28.

Figure 28 Enterprise Applications Page



13 Under the **Name** column, click the **ePortal** link.

- Click the **Configuration** tab and make sure the resulting parameters are configured as shown in Figure 29.

Figure 29 ePortal Application Configuration Tab

The screenshot shows the 'Configuration' tab for the 'Local Topology' of the 'user1_xp' application. The 'General Properties' section contains the following configuration:

General Properties		
Name	* ePortal	Specifies a logical name for the application. Application names must be unique within a cell.
Starting Weight	* 1	Specifies the order in which applications are started. Applications with lower startup order are started before those with higher startup order.
Application Binaries	* \$(APP_INSTALL_ROOT)/talomari_xp/	Specifies the full path name of the enterprise application binary file. The path name can be an absolute path or can contain a pathmap variable such as APP_INSTALL_ROOT.
Use Metadata From Binaries	<input type="checkbox"/>	Specifies whether the application server will use the binding, extensions, and deployment descriptors located with the application deployment document, the deployment.xml file (default), or those located in the application's ear file.
Enable Distribution	<input checked="" type="checkbox"/>	Specifies whether the application will be distributed automatically to other nodes on the cell. The default is for automatic distribution.
Classloader Mode	* PARENT_FIRST	Specifies whether classes are loaded via the parent classloader before this one.
WAR Classloader Policy	* Module	Defines whether there is a single classloader for all WARs in the application or a classloader per WAR in the application.
Reload Enabled	<input checked="" type="checkbox"/>	Specifies if class reloading is enabled for application files when they get updated.
Reload Interval		The timeperiod (in seconds) in which the application's filesystem will be scanned for updated files.

Buttons: Apply, OK, Reset, Cancel

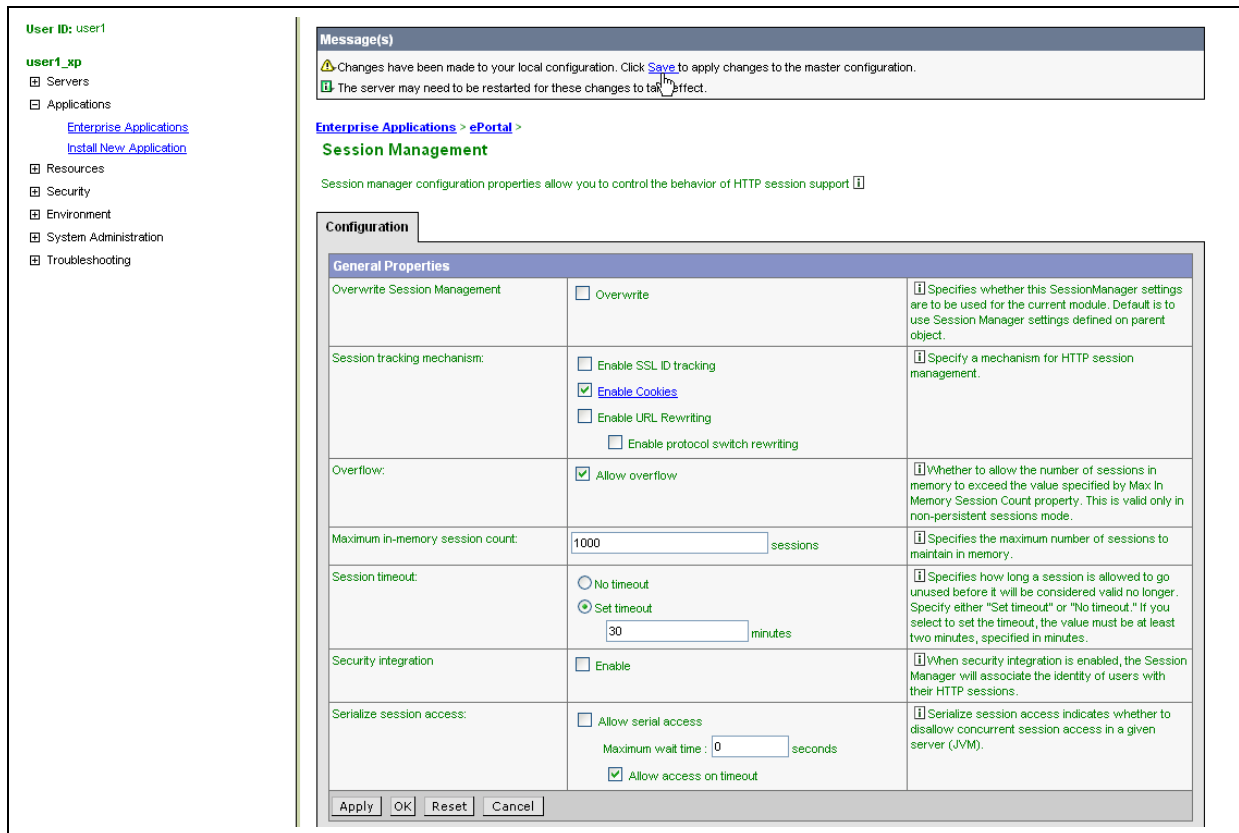
Additional Properties

Target Mappings	The mapping of this deployed object (Application or Module) into a target environment (server, cluster, cluster member)
Libraries	A list of library references which specify the usage of global libraries.
Session Management	Session Manager properties specific to this Application
View Deployment Descriptor	View the Deployment Descriptor
Man security roles to users/roles	Man security roles to users/roles

- When you are finished, click **OK** or **Apply**.
- On the ePortal Application Configuration tab shown in Figure 29 on page 54, click the **Session Management** link under **Additional Properties**.

- 17 Make sure the resulting parameters are configured as shown in Figure 30.

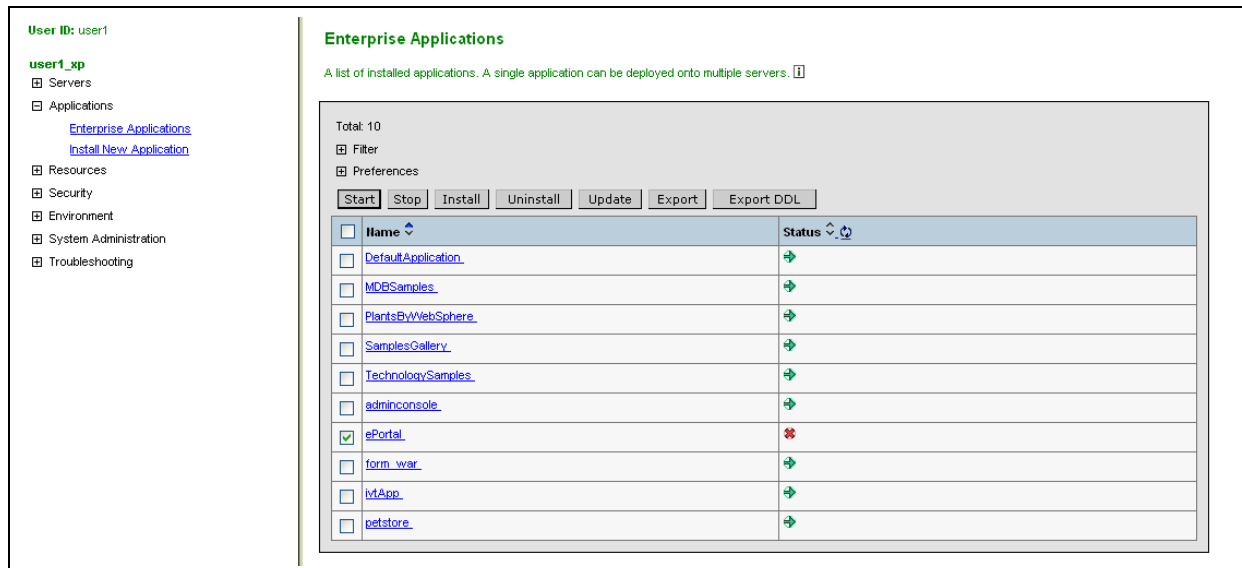
Figure 30 Session Management Parameters Page



- 18 When you are finished, click **OK** or **Apply**.
The Enterprise Applications page appears again.

- Under the **Names** column, click the box next to **ePortal.war**, and click **Start**. See Figure 31.

Figure 31 Configuration Tab



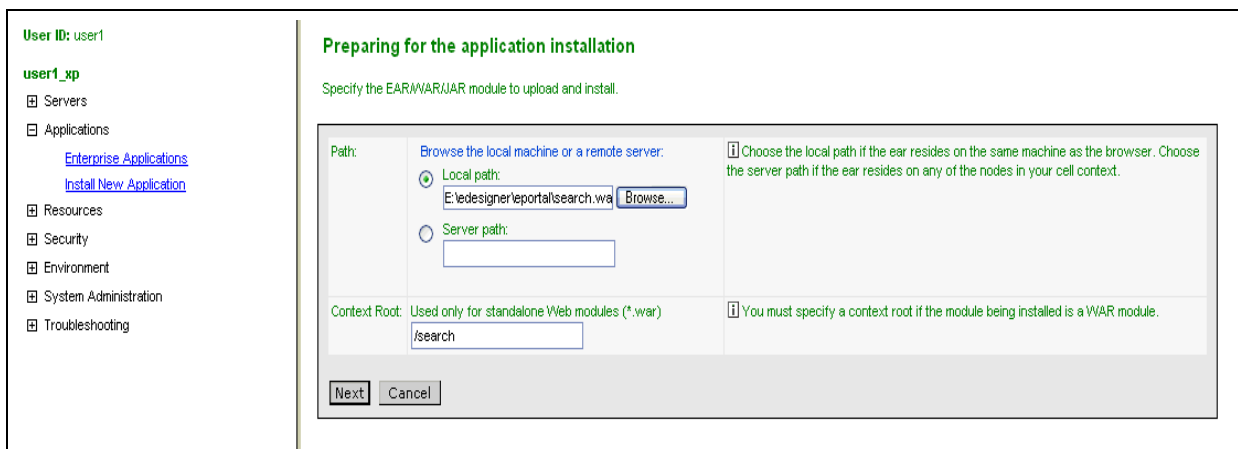
This action runs the ePortal application.

Installing the Search Engine

To install the ePortal search engine on WebSphere

- Make sure that the WebSphere server is running.
- Start the WebSphere Administrative Console.
- Click the **Preparing for the application installation** link and enter the values on the page as shown in Figure 32. Then click **Next**.

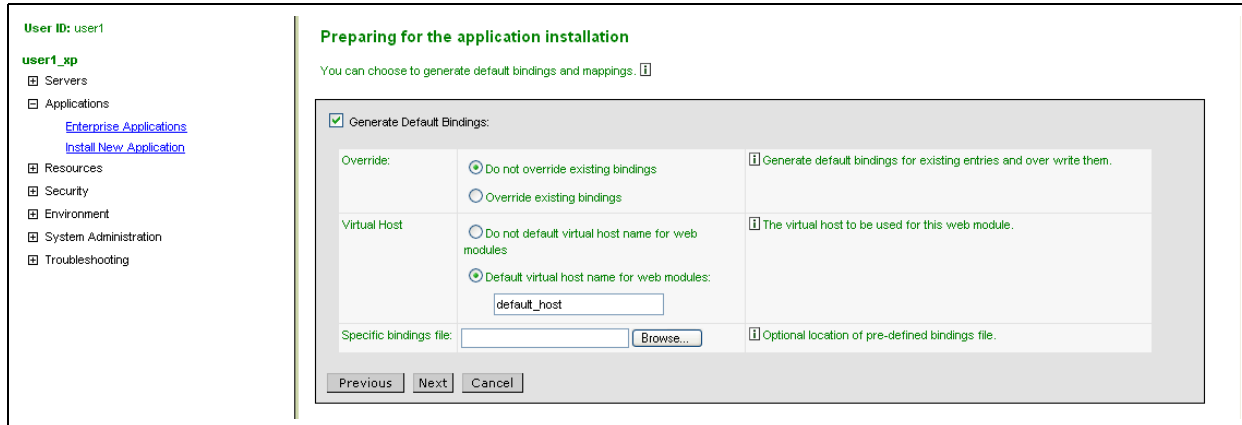
Figure 32 Preparing for the Application Installation Page (Search 1)



Entering the information for the **search.war** file ensures that the search engine is installed.

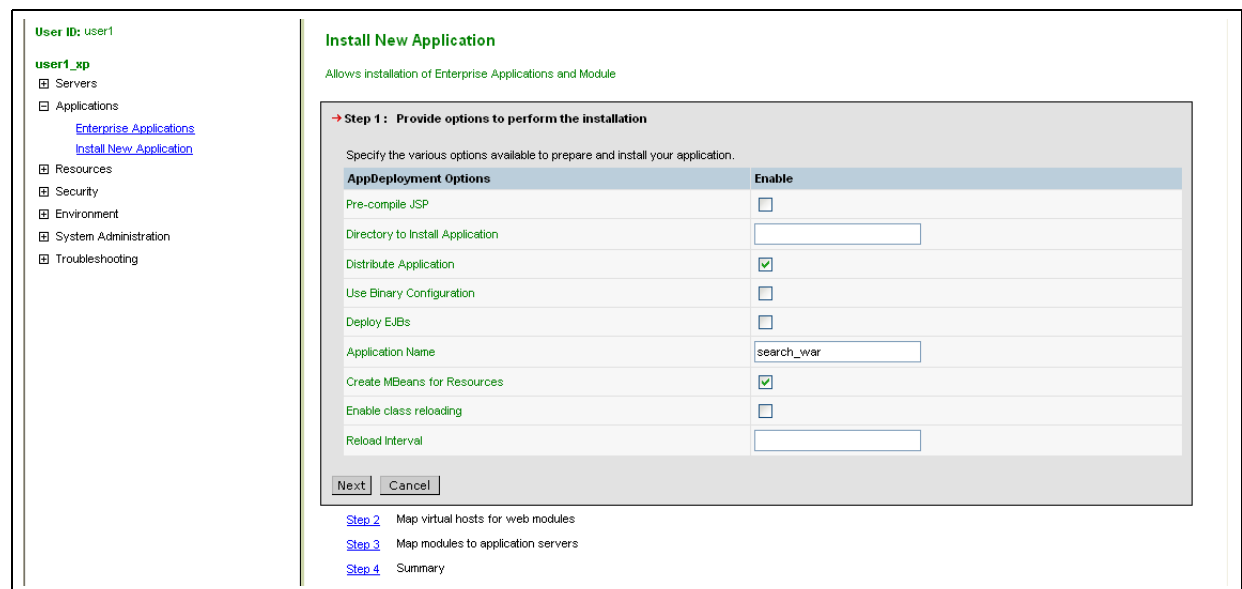
- 4 Enter the parameters in the next page as shown in Figure 33. Then click **Next**.

Figure 33 Preparing for the Application Installation Page (Search 2)



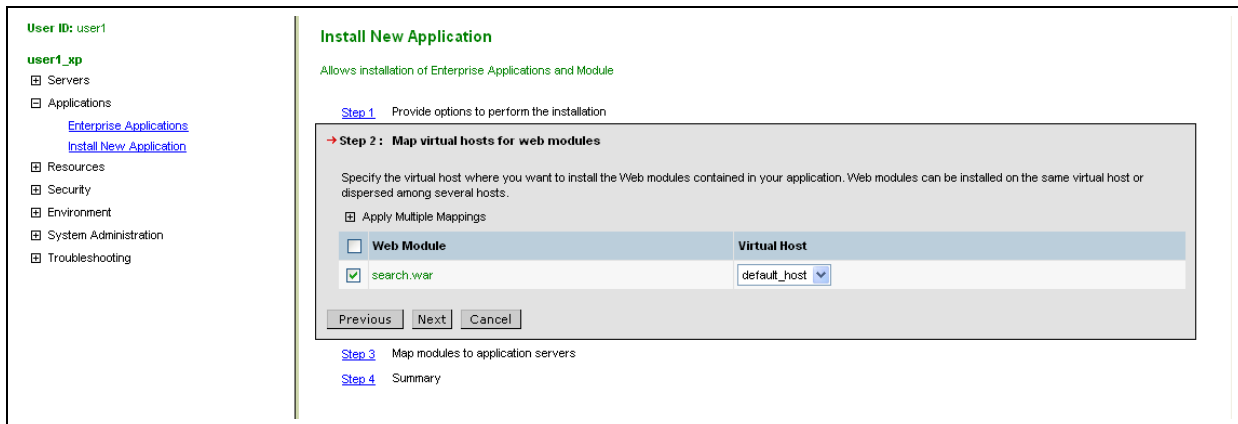
- 5 Click the **Install New Application** link and enter the values on the page as shown in Figure 34, under **Step 1**. Then click **Next**.

Figure 34 Installing Search Engine: Step 1 Page



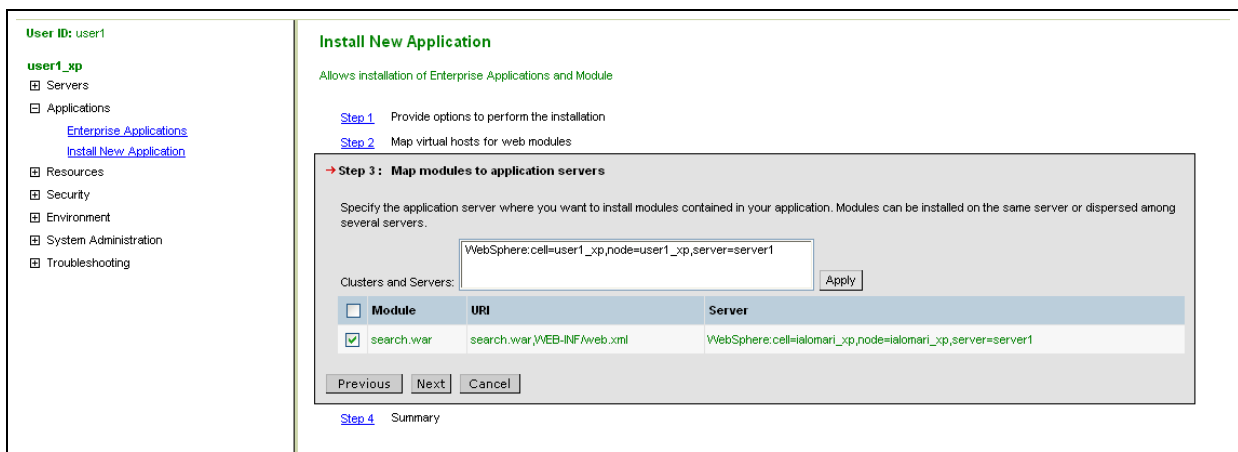
- Under **Step 2**, enter the additional values on the page as shown in Figure 35. Then click **Next**.

Figure 35 Installing Search Engine: Step 2 Page



- Under **Step 3**, enter the values on the page as shown in Figure 36. Then click **Next**.

Figure 36 Installing Search Engine: Step 3 Page



- 8 **Step 4** shows a summary of all the values you have entered so far. See Figure 37. If these values are correct, click **Next**.

Figure 37 Installing Search Engine: Step 4 Page

Install New Application
Allows installation of Enterprise Applications and Module

[Step 1](#) Provide options to perform the installation
[Step 2](#) Map virtual hosts for web modules
[Step 3](#) Map modules to application servers

→ Step 4: Summary

Summary of Install Options

Options	Values
Distribute Application	Yes
Use Binary Configuration	No
Cell/Node/Server	Click here
Create MBeans for Resources	Yes
Enable class reloading	No
Deploy EJBs	No

```

//
// Template policy file for enterprise application.
// Extra permissions can be added if required by the enterprise application.
//
// NOTE: Syntax errors in the policy files will cause the enterprise application FAIL to start.
// Extreme care should be taken when editing these policy files. It is advised to use
// the policytool provided by the JDK for editing the policy files
// (WAS_HOME/java/re/bin/policytool).
//
grant codeBase "file:${application}" {
};

was.policy.data

grant codeBase "file:${jars}" {
};

grant codeBase "file:${connectorComponent}" {
};

grant codeBase "file:${webComponent}" {
};

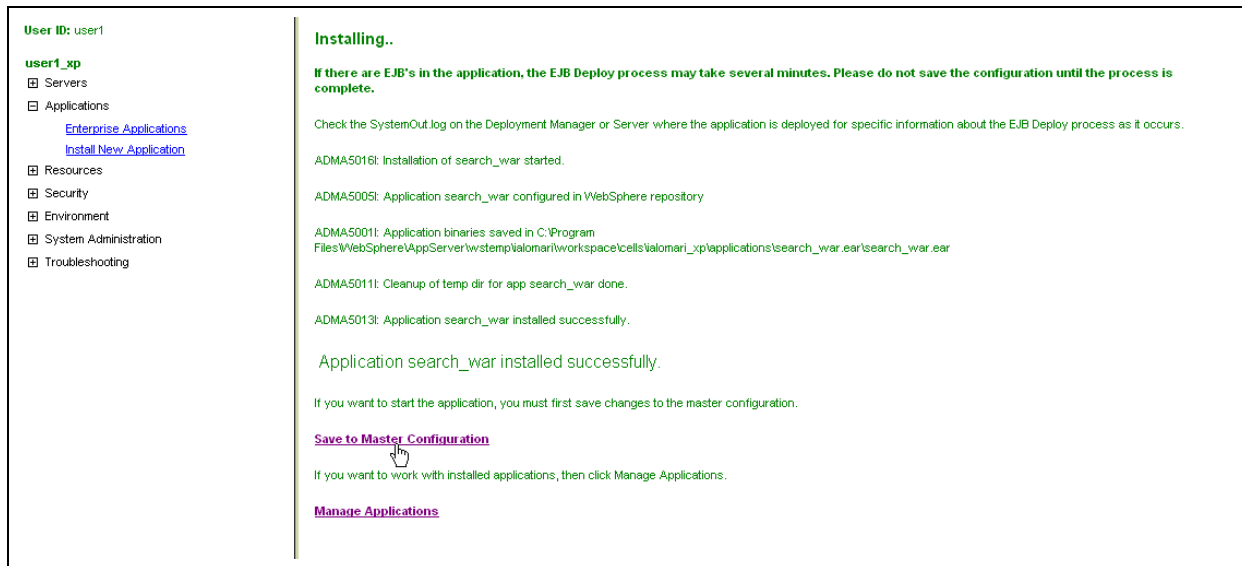
grant codeBase "file:${ejbComponent}" {
};
    
```

Application Name: search_war
 Reload Interval:
 Directory to Install Application:
 Pre-compile JSP: No
 Application Name: search_war

An additional page appears telling you the search engine is installing.

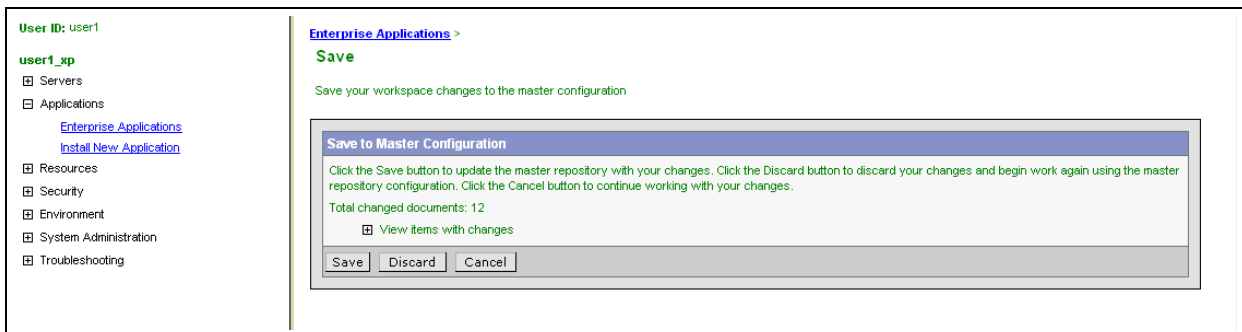
- When this installation operation is finished, click the **Save to Master Configuration** link. See Figure 38.

Figure 38 Installing Operation Page



- Click **Save** to save your search engine configuration. See Figure 39.

Figure 39 Save to Master Configuration



For more information on installing and deploying applications on WebSphere, see the appropriate WebSphere documentation.

Getting Started

This chapter provides an overview of ePortal’s basic operations and how to get started using them. You can also use this chapter as a quick-reference guide.

Chapter Topics

- [“ePortal General Administration” on page 61](#)
- [“ePortal Personalization” on page 65](#)
- [“Logging On to ePortal” on page 66](#)
- [“ePortal Tool Buttons” on page 68](#)

4.1 ePortal General Administration

This section provides a guide to how the basic components of ePortal operate and how a system Administrator can go about planning and setting them up. These ePortal components are:

- Channels
- Categories
- Groups and subgroups
- Permissions
- Fragments

[Table 8 on page 62](#) shows a brief description of each of these components with references for more information elsewhere in this guide.

Table 8 Basic ePortal Components

Component	Description	Reference
Channel	The mechanism through which enterprise data is aggregated and distributed. You can assign multiple channels to a single portal; a channel is also called a <i>portlet</i> .	See “ Managing Channels ” on page 74.
Category	A logical collection of groups that go together, for example, having a similar or related purpose; this is a top-level group or channels.	See “ Managing Categories ” on page 95.
Group or subgroup	A collection of channels that logically go together, based on a related purpose or interdependencies. Groups/subgroups are structured in a hierarchy defined and maintained by the system Administrator.	See “ Managing Groups ” on page 87.
Permission	Allows the system Administrator to assign channel access to channels and categories either directly or as inherited through the hierarchy of group memberships.	See “ Managing Permissions ” on page 97.
Fragment	Allows the system Administrator to assign skins and mandatory channels to group members.	See “ Managing Fragments ” on page 106.

For details on ePortal system Administration, see [Chapter 5](#).

4.1.1 Channel Management

A channel is the ePortal component that both collects and distributes enterprise data. As a system Administrator, you can assign multiple channels to a single portal.

You can also associate one channel with more than one category, that is, channels can be shared. For example, a channel called **Top 10 Customers** can be associated with the category **Sales** and also with the category **Executive Management**.

4.1.2 Category Management

A *category* is the top-level group in ePortal’s group hierarchy. The system Administrator can combine into a category a collection of channels that share elements in common, for example, being similar or related in some way. An effective corporate portal makes it easy for users to find the information they need by presenting it in the context of categories relevant to the business.

In this way, a portal is like a newspaper, and the Administrator is like the newspaper’s editor. Once a channel (like an article) is ready to be published, it first needs to be assigned to one or more categories. For a newspaper, this action could be deciding whether the article fits best under sports, metro, or lifestyle. The resulting organization determines which users (readers) are going to read a given article.

One category can also be associated to one or more channels. For example, the channel **Stocks** could be associated with the channels **Bloomberg** and **Yahoo Finance**.

To create a category of channels, you must use the system Administrator's **Groups Manager** panel interface feature.

4.1.3 Group Management

Normally, the system Administrator creates an ePortal *group* based on users and channels that share one or more important commonalities. Groups, in turn, belong to categories.

Examples of groups can be functional departments, such as Human Resources or Sales, geographic locations, such as U.S. Office or U.K. Office, and a straight one-to-one copy of available Enterprise Designer roles, such as **developer** or **administration**.

Categories: You create a new category under **All Categories**. Categories can contain the following members:

- Channels
- Groups

Groups: Can contain the following members:

- Channels
- Subgroups

Subgroups: Can contain the following members:

- Channels
- Additional subgroups

To create a category, group, or subgroup of channels, you must use the system Administrator's **Groups Manager** panel interface feature.

Roles in ePortal

A *role* in ePortal is a container for users who have something in common. The ePortal system Administrator can create roles, as desired. This setup allows customers to set up a matrix of roles and categories/groups. Keep in mind that a role is just a collection of users. It has no significance in setting up channel categories, groups, and subgroups or assigning permissions. These channel collections, for example, groups, are ePortal-specific. However, roles are created using your access control system, for example, the Enterprise Designer.

ePortal supports the concept of roles within roles (subroles) only if ePortal user authentication and management is supported by an Lightweight Directory Access Protocol (LDAP) directory and only for the LDAP products supported in ePortal. If you use the Enterprise Designer user authentication, you *cannot* create subroles.

4.1.4 Permissions Management

Permissions are a method of granting or denying access by users or collections of users to channel functionality within ePortal.

Table 9 shows a brief list explaining permissions terminology in ePortal.

Table 9 Permissions Terminology

Permissions Term	Description
Permission	You assign a permission to a principal to do an activity in regard to a target. Permission can be either grant , deny , or <blank> , which inherits any grants from any ancestor group or category. A deny , for example, stops a search up a particular branch.
Principal	A user or a collection of users; in ePortal, users are aggregated into roles.
Activity	Can be a publish, view, or subscribe operation and varies according to the target.
Target	What an activity is being applied to, for example, a category, group, or channel.
Owner	Can be either the ePortal framework itself or a channel.

Assigning Group Managers

You can assign any category, group, or subgroup a manager (subadministrator), if desired. This feature allows the system Administrator to delegate the responsibility for administering a given collection of users to a designated manager.

Publishing Channels

This feature applies to channels allowed by the ePortal system. Administrators or sub-Administrators can set up channels in categories ready for access by ePortal users.

Subscribing to Channels

You can allow subscription to a single channel, or you can assign a category of channels. If the one of the latter two options is used, the permission implicitly applies to all the associated channels in the current category.

Channel subscription permissions are granted/denied *in the context of*:

- Categories
- Individual channels

Channel subscription permissions are granted/denied to:

- Groups
- Subgroups
- Individual users (as members of groups and/or subgroups)

4.1.5 Fragment Management

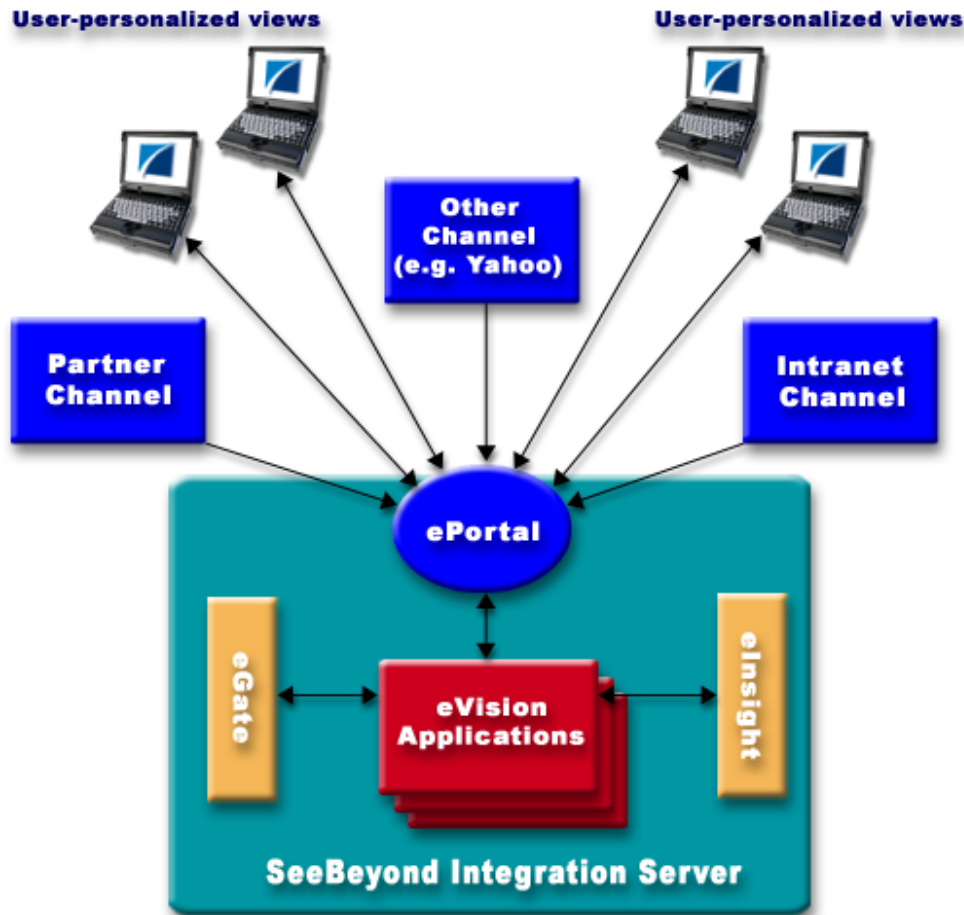
For complete information on managing fragments (which can contain mandatory channels), see [“Managing Fragments” on page 106](#).

4.2 ePortal Personalization

Users are allowed personalization privileges that enable them to specify the channels they want to see in a channel layout. However, the system Administrator can restrict access to personalization tools so that only administration-level personnel can create channel layouts and configure channel options.

Portals may comprise several URLs and Web applications with personalized content for each channel. ePortal channels are presented within a single, familiar Web interface. [Figure 40 on page 66](#) shows an example of ePortal running on the SeeBeyond Integration Server with SeeBeyond applications. ePortal can also operate in the same way, utilizing other systems, for example, WebSphere application server and LDAP.

Figure 40 Personalized Channels



For details on how to personalize ePortal, see [Chapter 6](#).

4.3 Logging On to ePortal

To log on to ePortal

- 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.
- ♦ *port* is the port number assigned to the SeeBeyond Integration Server on the Logical Host, for example:

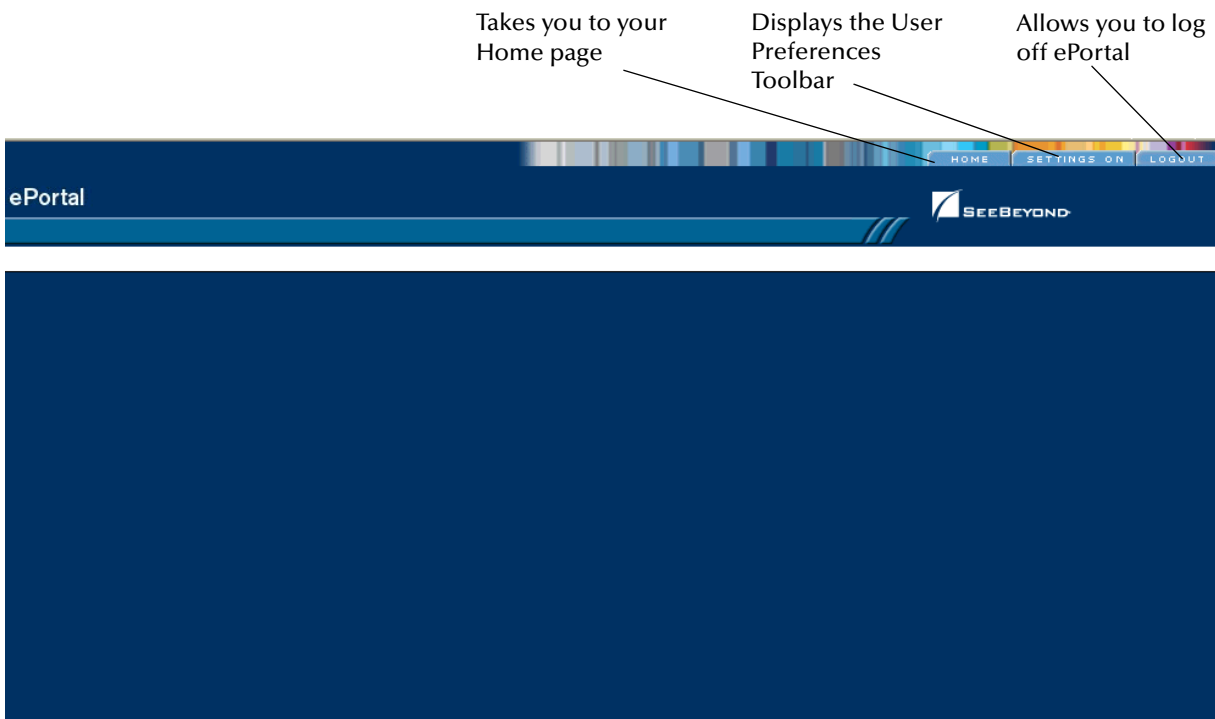
```
http://localhost:18004/ePortal/
```

The ePortal **Login** page appears.

- 3 On the **login** page, enter the following information:
 - ♦ User name
 - ♦ Password
- 4 Click **Login** or press **Enter**.

When you, as an ordinary user, first log on to ePortal, you see the “blank” page shown in Figure 41.

Figure 41 ePortal User Startup Page



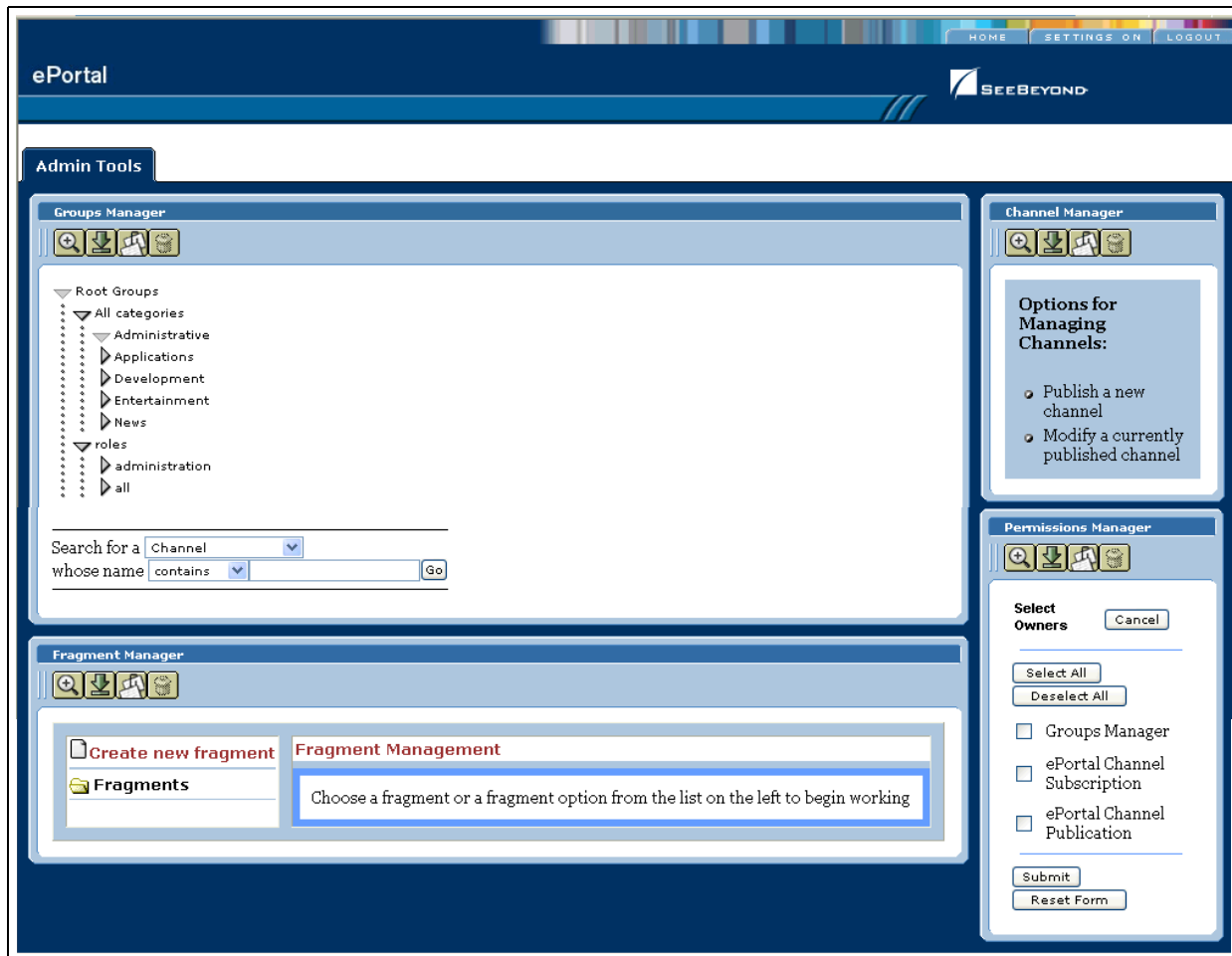
You must create tabs to view any channels on your user page view. To create and modify tabs, click **Settings On**. This action allows you to view the User Preferences toolbar (see “[User Preferences Toolbar](#)” on page 115 for details). Use this toolbar to begin creating your tabbed page views. The tab you place on the left is always your Home page.

If you are a system Administrator, you see the page shown in [Figure 42 on page 68](#).

4.4 ePortal Tool Buttons

The ePortal user interface contains a set of tool buttons that perform basic user operations. For example, Figure 42 shows the ePortal Administrator Home page, along with its associated tool buttons. Interface features for changing user preferences (for example, page view options) display many of the same buttons.

Figure 42 ePortal Administrator Home Page



Some of these tool buttons are available only to the Administrator user. Others are available to all users. Many of the buttons available to all users offer more features to Administrators and limited features to ordinary users.

Note: This guide explains how to use these features, including descriptions of the available buttons, along with details on how to use them.

Table 10 lists tool buttons available to ePortal users, along with a brief description of each button.

Table 10 ePortal Tool Buttons

















Tool Button	Description
	Close Group: Closes the current group's information panel.
	Delete Group: Allows you to delete a selected group.
	Delete: Deletes the current item or change.
	Detach: Detaches the current panel from the frame and allows it to open as a separate browser window.
	Disable Move: Locks columns and tabs so that you cannot move them.
	Edit Group: Allows you to edit the attributes and permissions of selected groups.
	Finish Editing Group: Saves the changes made to a group into the ePortal database.
	Focus: Makes the current panel the only browser window (toggle button with minus - instead of plus + does the opposite).
	Group Selector: Allows you to select and/or open the current group (points downward if group is open).
	Maximize: Maximizes the current panel; toggles with Minimize .
	Minimize: Minimizes the current panel; toggles with Maximize .
	Move: Click to move a tab or column.
	Remove Member: Allows you to delete members from a selected group.

Table 10 ePortal Tool Buttons (Continued)

Tool Button	Description
	Save Changes: Allows you to save your most recent set of changes to ePortal. Whenever you create a new component or edit an existing one, you must click this button to save your work.
	Show Information (Show Info): Displays information about a selected group; toggles with Hide Information , the same button except with an X mark over it.
	Submit: Click to apply a change to a tab or column.

System Administration

This chapter explains how to perform system Administration operations in ePortal.

Chapter Topics

- [“Overview” on page 71](#)
- [“Basic Administration Operations” on page 72](#)
- [“Managing Channels” on page 74](#)
- [“Managing Groups” on page 87](#)
- [“Managing Permissions” on page 97](#)
- [“Managing Fragments” on page 106](#)
- [“Custom Skins” on page 109](#)

5.1 Overview

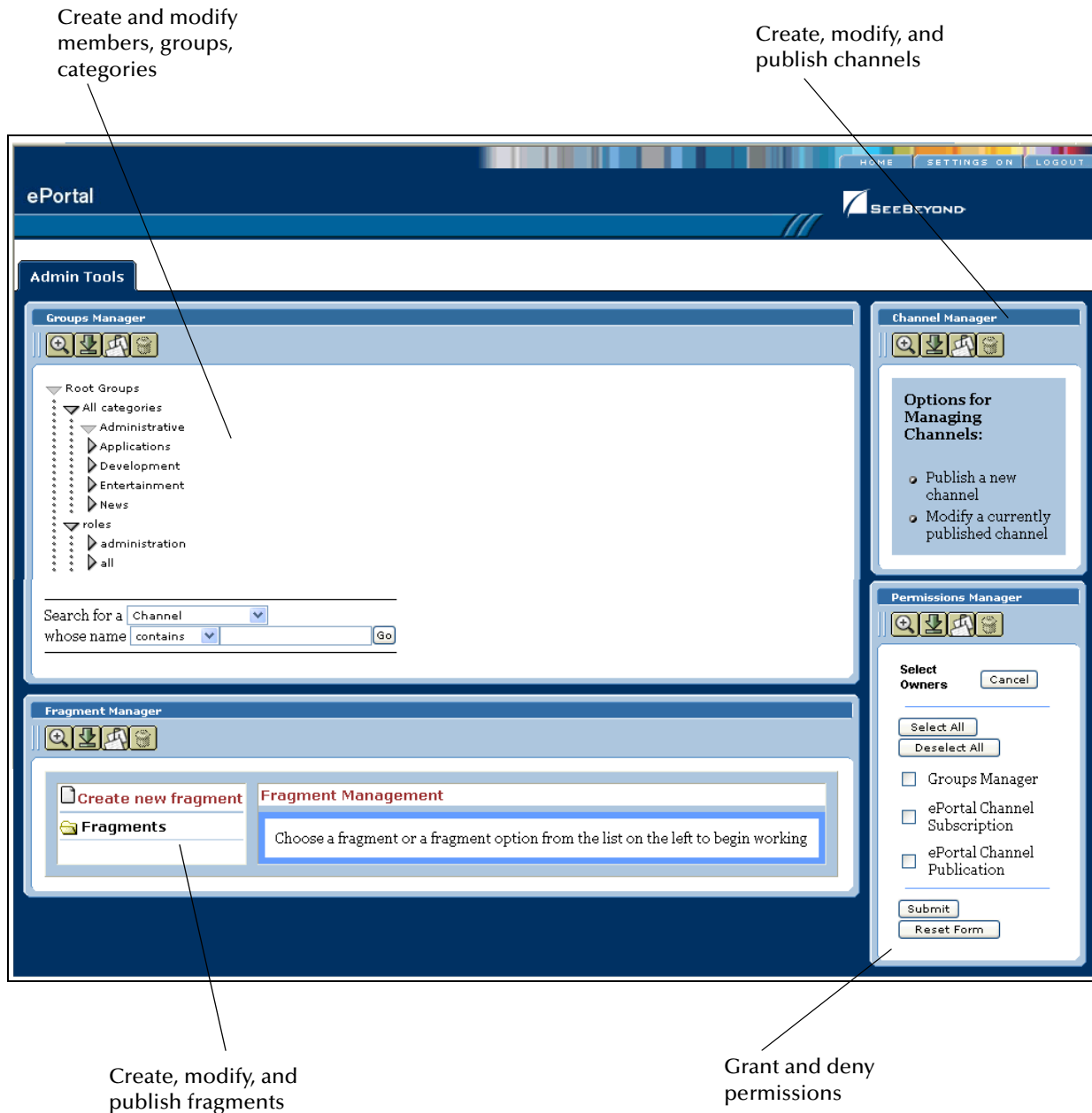
Only ePortal system Administrators are allowed to create, publish, and modify major ePortal components, such as channels, groups, and categories. The Administrator assigns channel privileges to groups and users. Administrators also create custom *skins*, that is, screen layouts, as well as mandatory channels for created *fragments*.

This chapter explains these features and how to do these operations. The procedures provided in this chapter assume that you have ePortal system Administrator (**Administrator**) privileges.

5.2 Basic Administration Operations

After you log on to ePortal as a system Administrator, you see the Administrator's Home page shown in Figure 43.

Figure 43 Administrator's Home Page



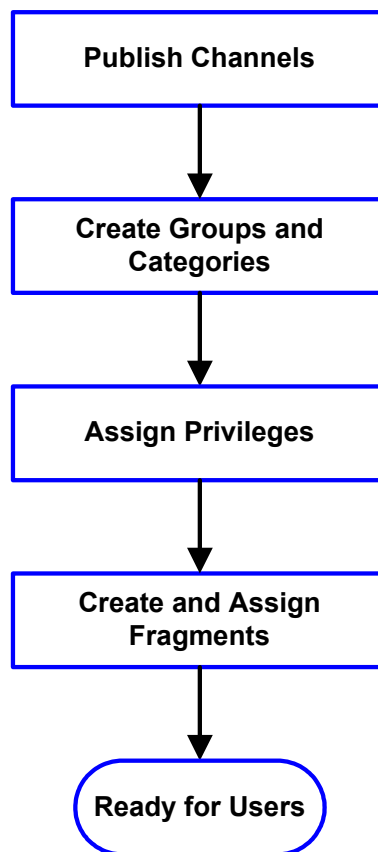
The Administrators' (and users') tools are represented by an assortment of tool buttons. See [Figure 42 on page 68](#). For a complete explanation of ePortal tool buttons in the normal view and edit modes, see [Table 10 on page 69](#).

Each of the panels on this page allows you to access basic ePortal system Administration features and operations. This page displays the following panels:

- **Groups Manager:** Allows you to create, populate, and organize ePortal groups.
- **Channel Manager:** Allows you to create, configure, and organize ePortal channels.
- **Permissions Manager:** Allows you to assign access permissions to ePortal users and/or groups.
- **Fragment Manager:** Allows you to assign layout designs and mandatory channels to ePortal users and/or groups.

Figure 44 shows a diagram of the order to perform these operations in ePortal.

Figure 44 Administration Operations Flow



You must perform these operations in the order shown in Figure 44. This chapter explains these basic ePortal administration operations.

Creating Custom Skins

Administrators can also create custom skins for users. Users can then use these skins for their own portals, as desired.

Logging On as guest or template

By logging on as **template** or **guest**, the system Administrator can change the look of log-on pages or customize the template for portal view pages, as follows:

- **guest:** Allows you to create a universal default log-in page for all users.
- **template:** Allows you to create a universal default portal view page for all users.

Log-on Defaults

Administrators can change these defaults, as desired. If you do not create any defaults, the initial log-in page contains only the log-on box (the rest is blank), and the initial portal view pages are blank.

5.3 Managing Channels

A channel (also called a *portlet*) is the mechanism through which enterprise data is aggregated and distributed. You can assign multiple channels to a single portal. This section explains channel management in ePortal.

For more information on channels in ePortal and how to manage them, see [“Channel Management” on page 62](#).

5.3.1 Channel Manager Panel

When you first see the Administrator Home page, the **Channel Manager** panel displays (see [Figure 43 on page 72](#)). This panel allows you to access the ePortal channel management features by clicking one of the following links:

- **Publish a new channel**
- **Modify a currently published channel**

These links on the **Channel Manager** panel access features that allow you to:

- Publish and remove channels for desired categories and groups
- Select channel types
- View channel information
- Edit channels (for example, modify descriptions or rename)
- Publish a search channel

5.3.2 Channel Types

Decisions on what channel types to use depends on the characteristics of your target channel application. ePortal allows you to select the following channel types:

- **Custom Channel:** Offers the most flexibility for integration. A custom channel is a specially developed ePortal application, and the development process is similar to developing servlets in a J2EE application.

The Custom channel type allows the publication of channels with no accompanying Channel Publishing Document (CPD). This type is typically used to publish channels with only one corresponding channel definition.

A JSP application retrieving sales information and renders a sales pipeline “dashboard” is an example of this type.

- **Applet:** Allows you to display a Java applet.
- **Image:** Displays an image with optional caption and subcaption.
- **Inline Frame:** Renders an HTML page within a frame. This channel type is not supported in browsers older than Internet Explorer version 5.0 and Netscape version 6.0.

A loan application Web page designed and generated by eVision is an example of this type.

- **RSS:** Renders content provided in the Rich Site Summary (RSS). This channel type is useful for a news-feed type service.

RSS is a method of describing news or other Web content available for “feeding” (distribution or syndication) from an online publisher to Web users. RSS documents describe content including the location where content resides.

A daily news, RSS-type feed from an Internet News site is an example of this type.

- **Web Proxy:** Incorporates a dynamic HTML or XML application. This channel type allows existing Web sites to be displayed without requiring any custom development.

A custom-developed JSP application is an example of this type.

- **WSRP Consumer:** Web Services for Remote Portlets (WSRP) consumer implementation. See [“Using WSRP Consumer Channels” on page 85](#) for details.
- **XML Transformation:** Transforms an XML document into a fragment of markup language given a set of XSLT-style sheets specified in a style sheet list (SSL) file.

The XML transformation channel is a variation on the Web Proxy channel development approach, except that it is more limited in functionality. By contrast, this channel type is more difficult to implement. This problem arises because XML transformation requires the developer to deliver content in the XML format and provide corresponding XSL style sheets for converting the content to XHTML format for display over an ePortal channel.

An XML-based customer list rendered using an XSLT style sheet is an example of this type.

5.3.3 Publishing a New Channel

To publish a new channel

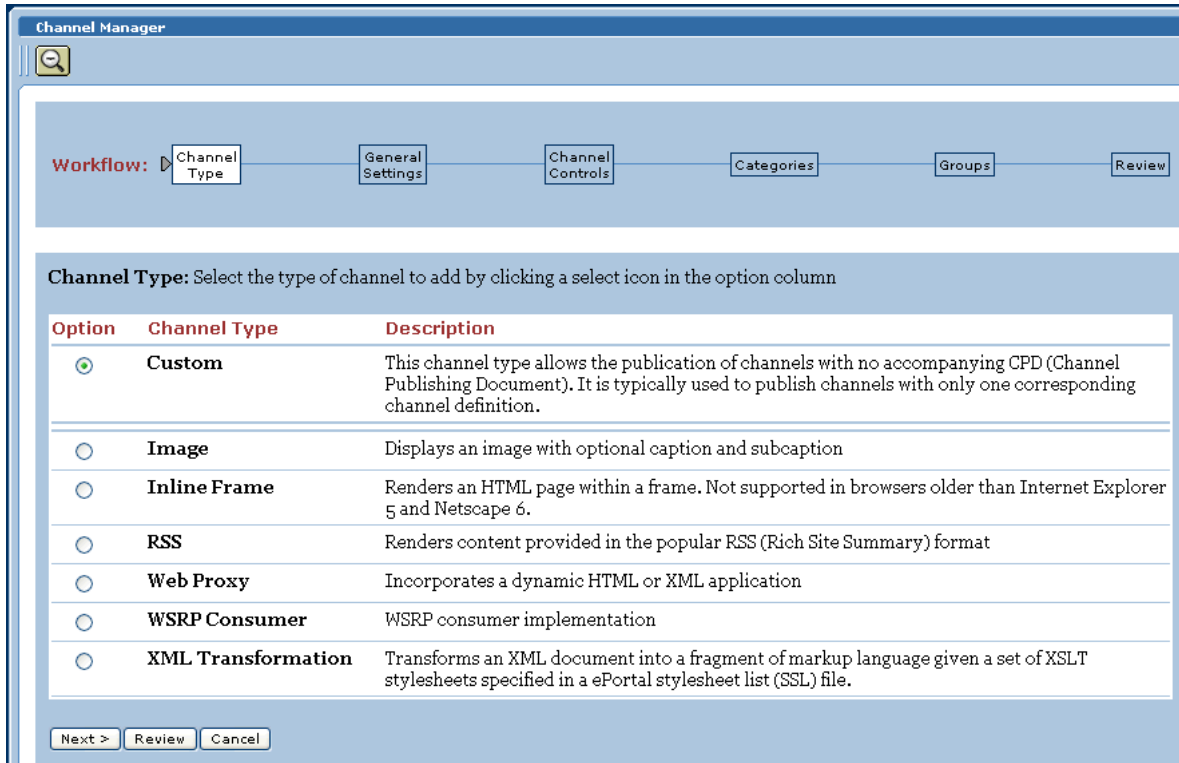
- 1 Start your browser and log on to ePortal as Administrator.

The Administrator’s Home page displays. See [Figure 43 on page 72](#).

- 2 On the **Channel Manager** panel, under the **Options for Managing Channels** heading, click **Publish a new channel**.

The panel expands to show additional options for the channel type. See Figure 45.

Figure 45 Selecting the Channel Type



- 3 In the **Channel Type** area, select a channel layout option, for example: **Inline Frame**.

Note: You can publish channels in several formats, as explained in this section. Only the **Inline Frame** format is explained here, as an example. Publish channels in other formats in the same way by entering the appropriate information where prompted.

For complete information on the available channel types, see **“Channel Types” on page 74**.

You can click **Cancel** to discard your changes and start over again, at any time.

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

- Click **Next**. See Figure 46.

Figure 46 Selecting General Settings

The screenshot shows the 'Channel Manager' application window. At the top, there is a search icon and a workflow diagram with steps: Channel Type, General Settings (highlighted), Inline frame parameters, Channel Controls, Categories, Groups, and Review. Below the workflow, the 'Settings [one]: Complete the Settings form below' section is visible. It contains a table with two columns: 'Options' and 'General Settings'. The 'General Settings' column lists several fields: Channel Title, Channel Name, Channel Functional Name, Channel Description, Channel Timeout, and Channel Secure. Each field has a corresponding input box or checkbox. At the bottom of the form, there are navigation buttons: '< Back', 'Next >', 'Review', and 'Cancel'.

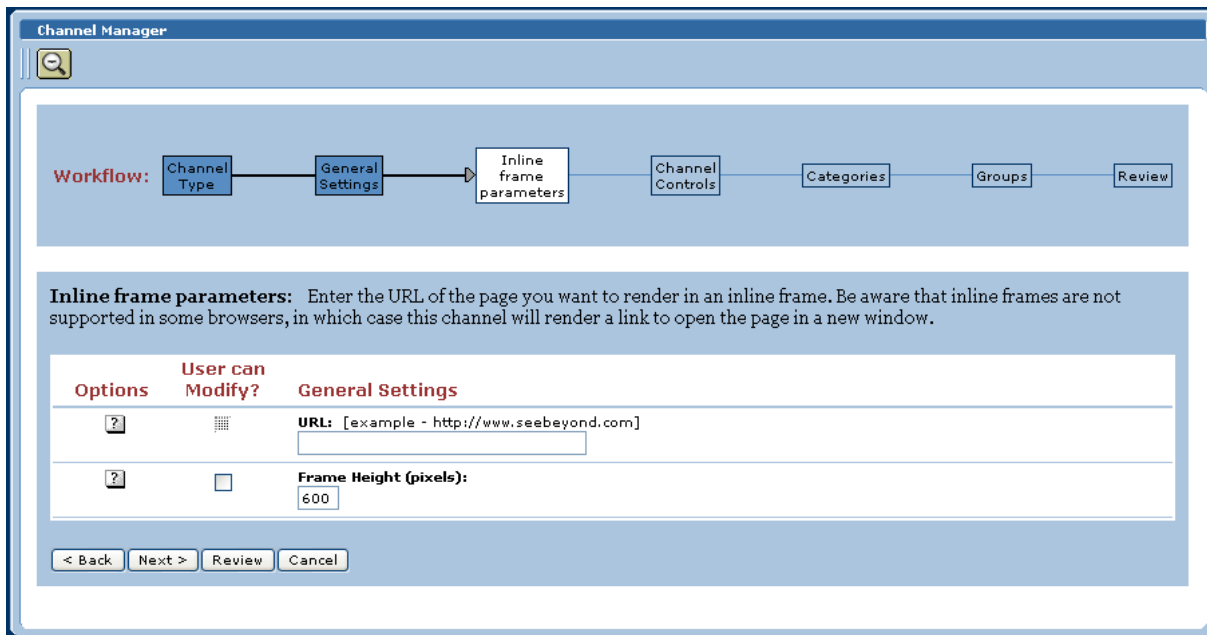
Options	General Settings
[?]	Channel Title:[example - StockCharts] <input type="text"/>
[?]	Channel Name:[example - StockCharts] <input type="text"/>
[?]	Channel Functional Name:[example - stock-charts] <input type="text"/>
[?]	Channel Description: <input type="text"/>
[?]	Channel Timeout: <input type="text"/> milliseconds (1000 = 1 second)
[?]	Channel Secure: <input type="checkbox"/>

< Back Next > Review Cancel

- Under the **General Settings** column, enter the following information in the labeled text boxes:
 - 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 configuring a channel's layout, security, and view for a particular user. If you open a channel in a separate browser window, this name appears in the window's title bar.
 - Channel Functional Name:** An optional unique name you can give a channel for identification purposes, for example, /news/cnn for CNN. See [Figure 54 on page 85](#) for an example.
 - Channel Description:** A short overview of the channel's purpose.
 - Channel Timeout:** The time-frame, in milliseconds, within which a channel response must be received during a Web application query. When the set time elapses without a response, the channel is closed.
 - Channel Secure:** Check the box if you want this to be a secured channel.
 - Channel Class:** If you wish this channel to be part of a class (collection) of related channels, enter the class name.

- 6 Enter the desired information then click **Next**. See Figure 47.

Figure 47 Selecting In-line Frame Parameters



- 7 Under the **General Settings** heading, in the **URL** text box, enter the URL for the page you want to display in the in-line frame.

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

Caution: Do not use *localhost*. If more than one machine uses this designation, ePortal does not interpret it correctly.

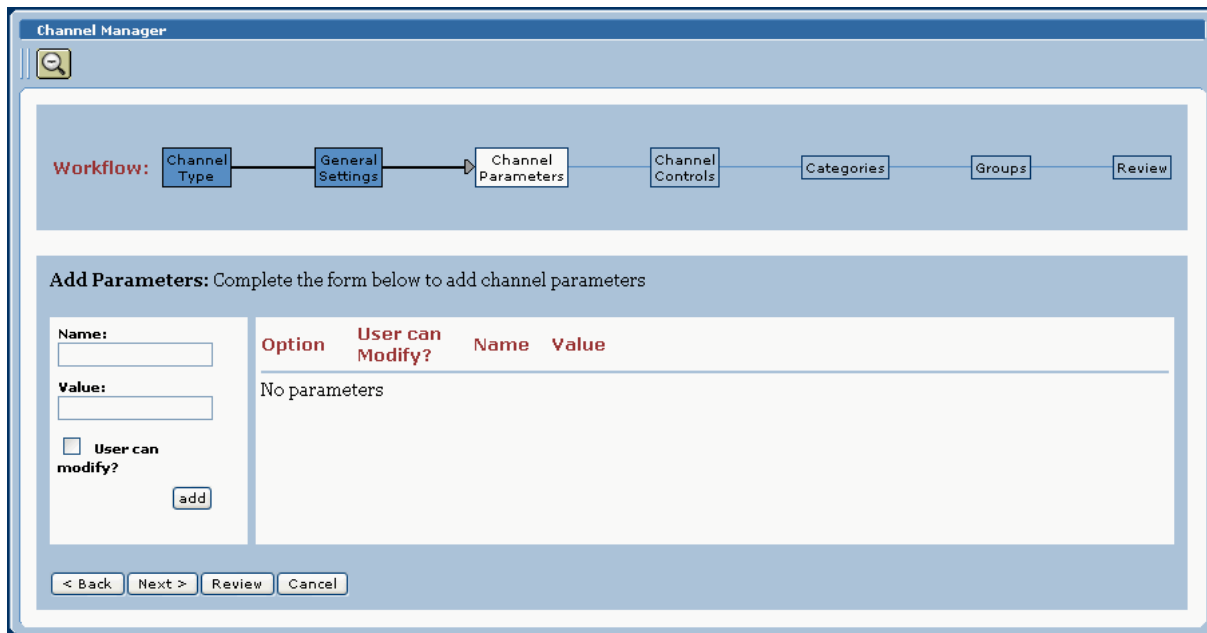
- 8 In the **Frame Height** text box, in pixels, type in a height value.

This is the height constraint within which the channel will present the application's Web interface to channel users.

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

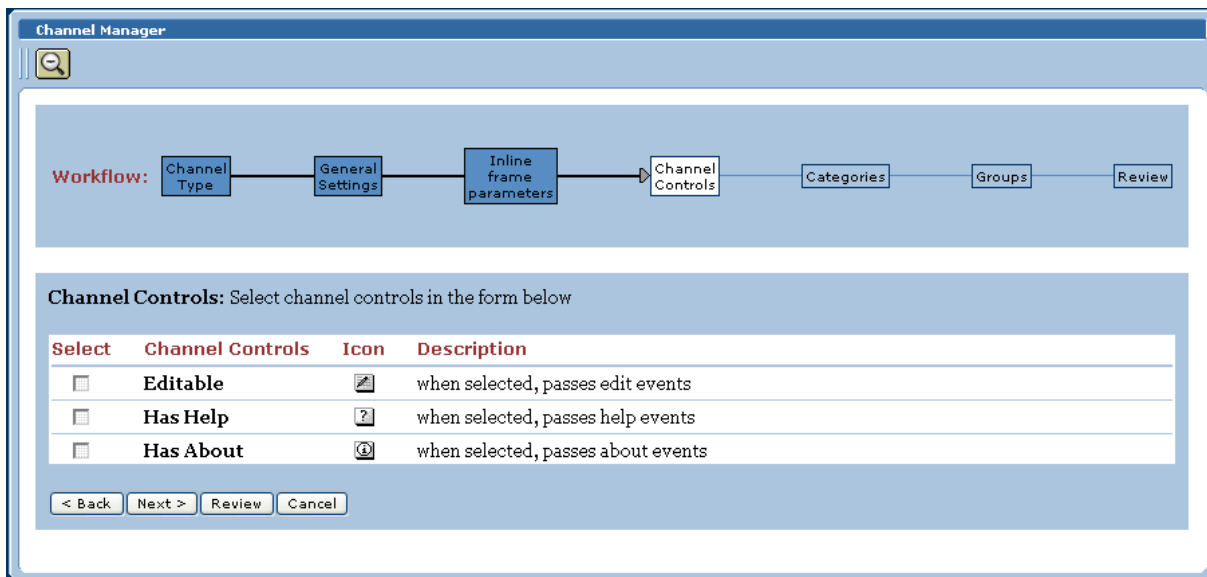
If you are not using in-line frames, you get the **Channel Parameters** page. See [Figure 48 on page 79](#).

Figure 48 Selecting Channel Parameters



- 9 Enter the name and value of the desired channel parameters. You can use the check box to check whether you want the user to modify the desired parameter. Then click **Add**.
- 10 Click **Next**. See Figure 49.

Figure 49 Selecting Channel Controls



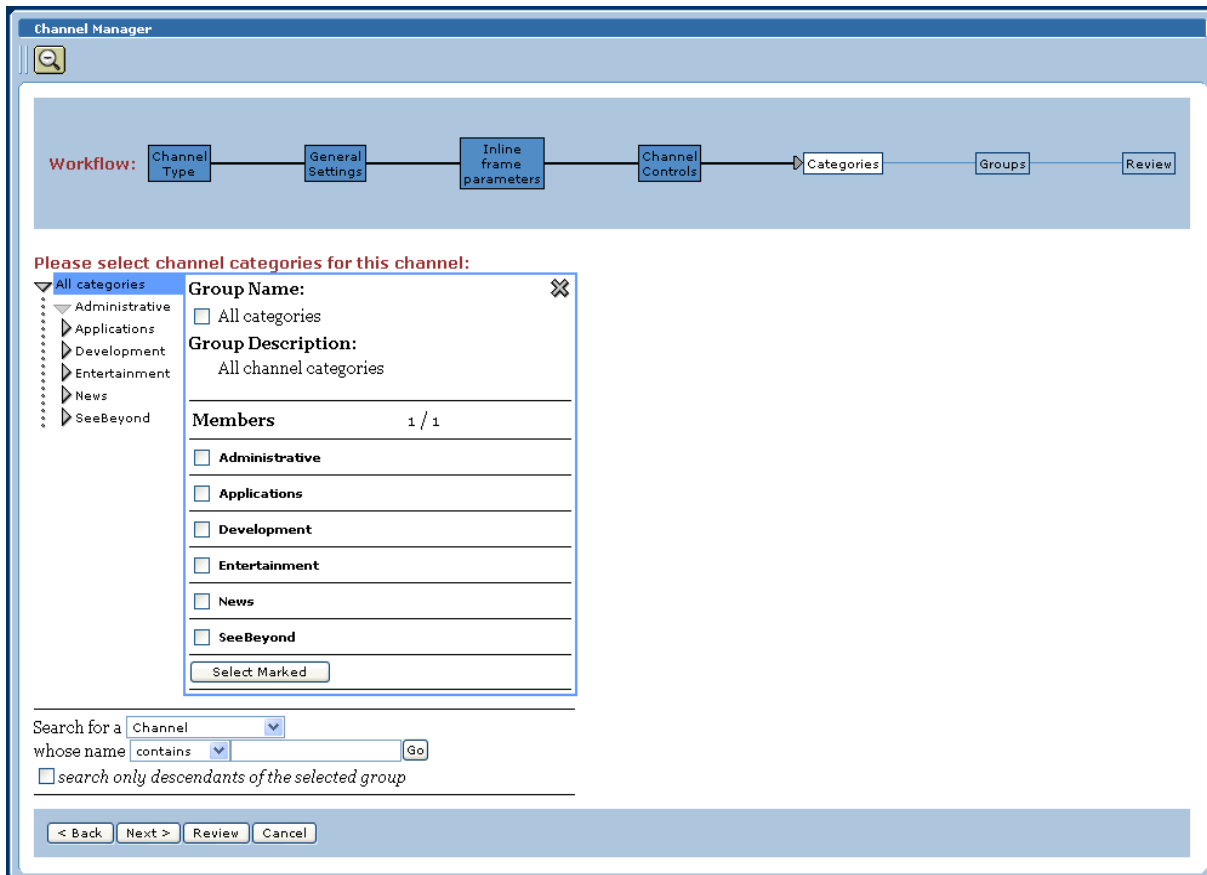
- 11 Under the **Channel Controls** column, under the **Select** heading, select or clear the controls you want to add to the channel.

This maps Help and associated information to the control buttons (shown under the **Button** 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.

12 When you are finished, click **Next**. See Figure 50.

Figure 50 Selecting Categories



13 On the **Categories** box, to assign the channel to one or more categories, select the drop-down arrow and select an appropriate category from the list.

This feature groups channels together in related categories.

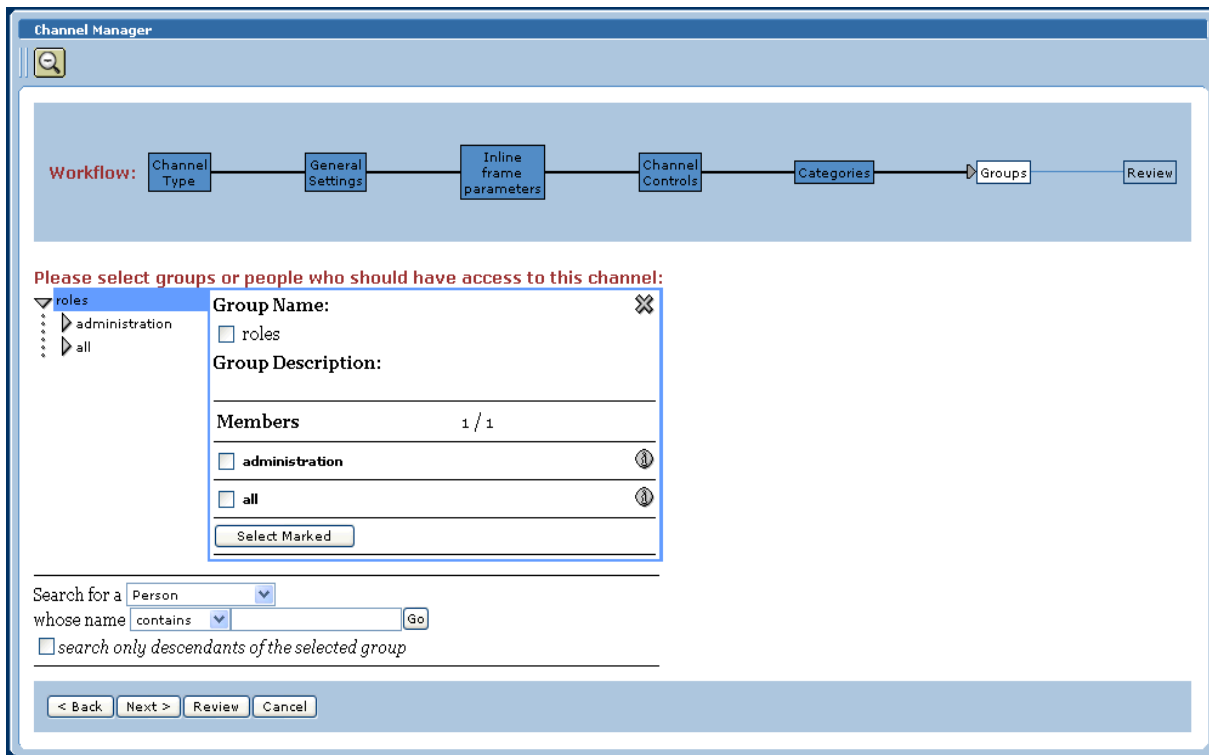
14 To add the channel to the category, click **Add**.

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**.

Note: This step is mandatory. ePortal limits this type of channel access to only the selected categories.

- 15 When you are finished, click **Next**. See Figure 51.

Figure 51 Selecting Groups (Roles)



- 16 On the **Groups** box, to specify the *roles* that you want to have access to the channel, select the drop-down arrow and select the roles from the list then click **Add**.

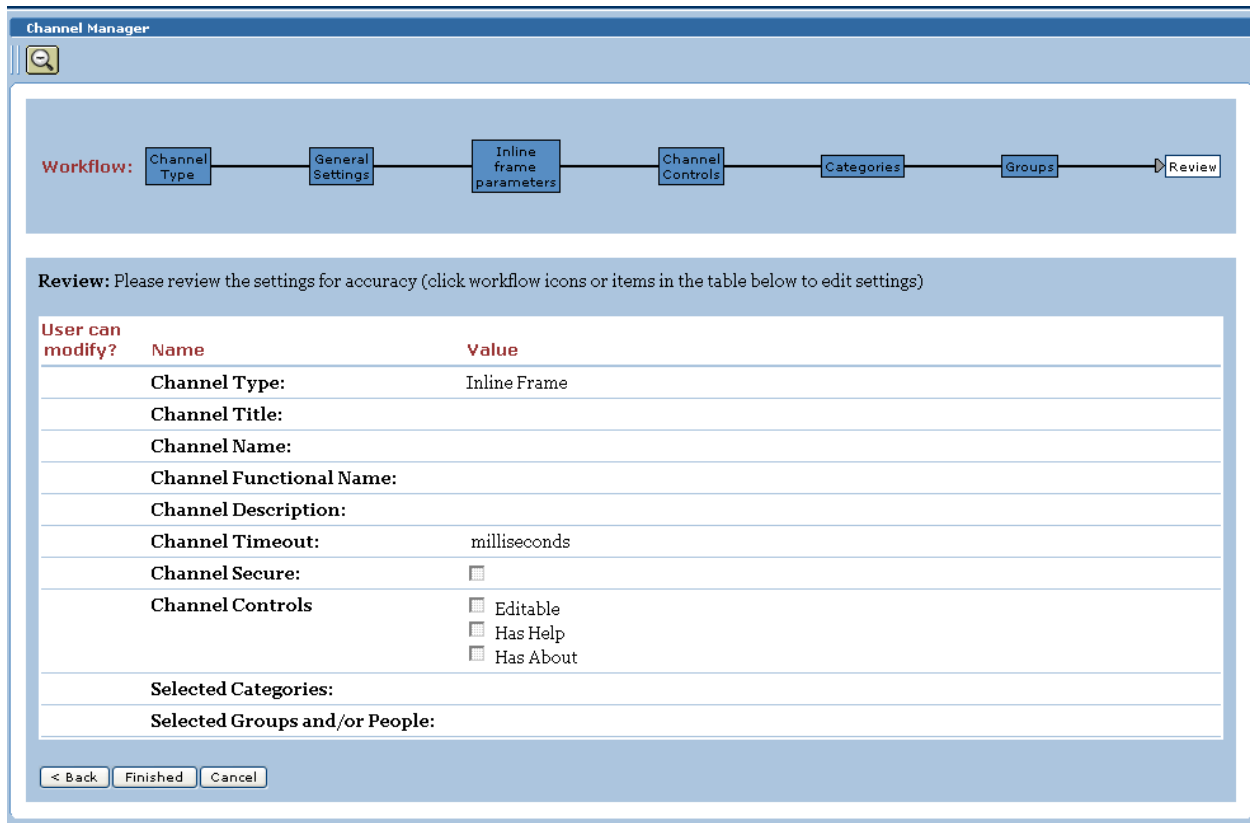
Note: Even though the box displays **Groups**, you are actually selecting *roles* under this step.

The desired role displays to the right of the **X** under the **Selected Group** heading.

To remove a channel from the role, under the **Option** heading, click **X**.

- 17 When you are finished, click **Next**. See Figure 52.

Figure 52 Reviewing Channel Setups



- 18 In the **Review** area, you can audit the information you provided for the channel.
 19 To complete the channel creation, click **Finished**.

5.3.4 Publishing a Search Engine Channel

ePortal provides a Search Engine that allows you to search for and upload files and documents to the Repository from external locations then retrieve them based on search criteria.

Creating a Channel for the Search Module

To enable this feature, you have to create a channel for it. To create a channel for the Search module, follow the steps explained under [“Publishing a New Channel” on page 75](#).

Specifying the URL for the Search Module

When creating a channel for the Search Module, the Search executable URL *must* have the following syntax:

Http://<hostname>:<port>/search/protected/SBSearch.jsp

Where:

- *hostname* is the name of the computer on which you installed the ePortal executables.
- *port* is the port number for the server, for example: **18004**.

Caution: *Do not use localhost. If more than one machine uses this designation, ePortal does not interpret it correctly.*

For an explanation of how users can access and use ePortal's search feature, see "[ePortal Search Engine](#)" on page 124.

5.3.5 Modifying a Channel

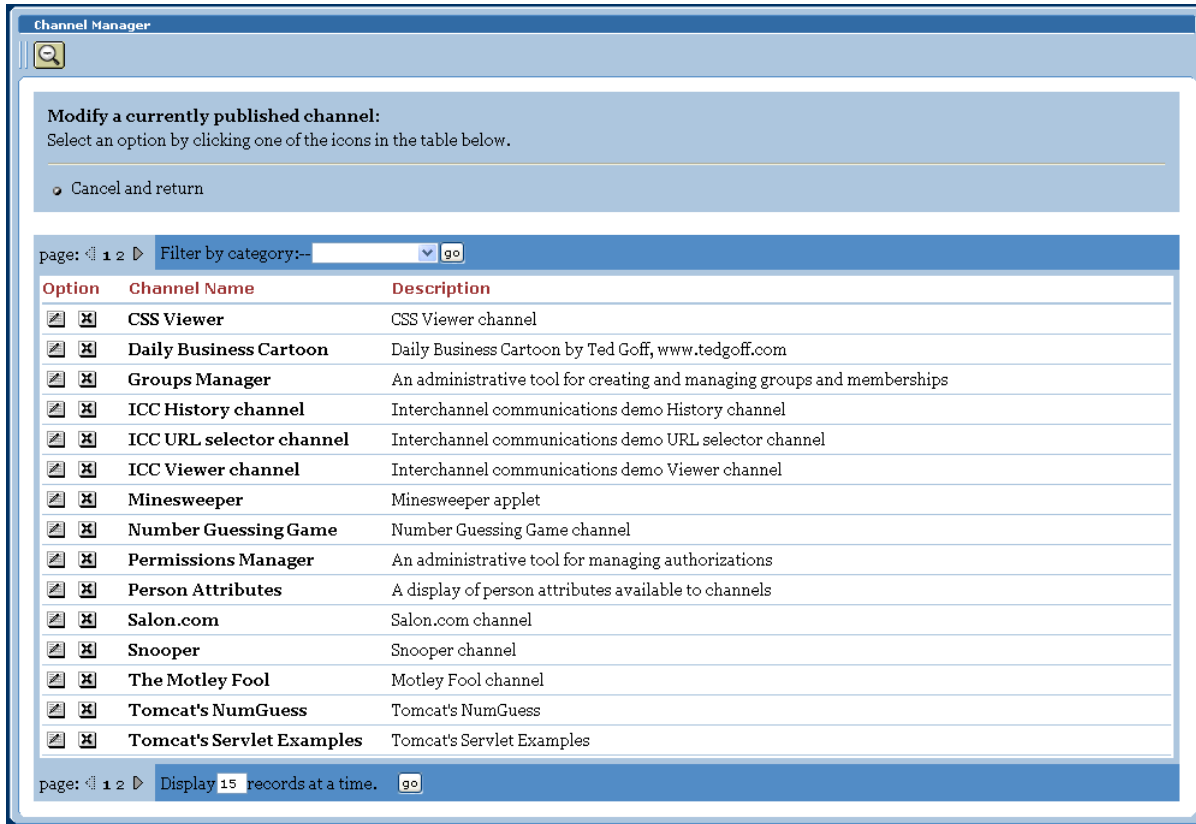
ePortal allows you to edit or remove any existing channel.

To edit or remove a channel

- 1 Start your browser and log on to ePortal as Administrator.
The Administrator's Home page displays. See [Figure 43 on page 72](#).
- 2 On the **Channel Manager** panel, under **Options for Managing Channels**, select **Modify a Currently Published Channel**.

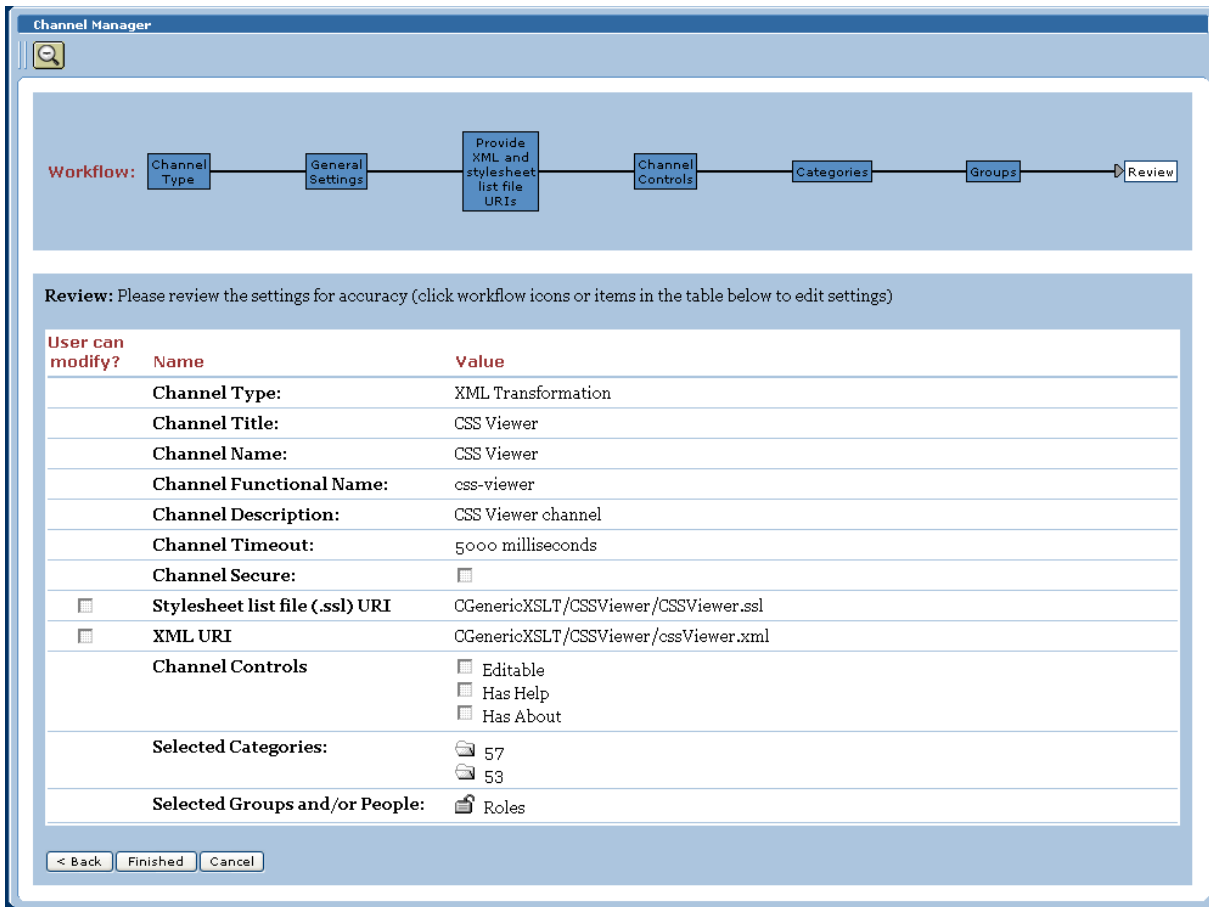
- 3 You can remove a channel by clicking the **Remove Member (X)** button under the **Option** column, next to the desired **Channel Name**. See Figure 53.

Figure 53 Modifying a Channel



- 4 You can edit a channel by clicking the other button, called **Edit Member**, next to the desired **Channel Name**. See Figure 54.

Figure 54 Editing a Channel



This page allows you to review the selected channel's current settings.

- 5 To continue, click **Channel Type**.
 - 6 Finish modifying a channel in the same way as you publish a new one (see [“Publishing a New Channel” on page 75](#)).
- See the [procedure on page 75](#) for details on the rest of the steps.
- 7 When you are done, click **Finished** to save your changes or **Cancel** to discard your changes and start over again.

5.3.6 Using WSRP Consumer Channels

ePortal allows you to create WSRP consumer channels that can display the contents of WSRP-compliant portlets running on a remote server.

WSRP Overview

WSRP services are Web Services International Association (WSIA) component services built on standard technologies including Simple Object Access Protocol (SOAP), Universal Description, Discovery, and Integration (UDDI), and Web Services Description Language (WSDL).

WSRP add several context elements including user profile, information about the client device, locale, and the desired markup language passed to them in SOAP requests. A set of operations and contracts are defined that enable WSRP plug-and-play.

WSRP Consumer Channels in ePortal: Overview

A WSRP producer provides Web services interfaces to business content and/or applications. ePortal can consume (access) this content/applications through its *WSRP consumer* channel type.

By way of WSRP, ePortal can easily integrate content and applications from many internal and external content providers, provided that they expose WSRP-producer services. No programming is required to access this business content and/or applications.

The following procedure explains how to publish a WSRP consumer channel in ePortal:

To publish a WSRP consumer channel

- 1 On the **Channel Manager** panel, click **Publish a new channel**.
- 2 Select **WSRP Consumer** as the **Channel Type**, then click **Next**.
- 3 Enter the **General Settings** in the same way as you do for any other channel. See the [procedure on page 75](#) for details. Click **Next**.
- 4 On the **WSRP Consumer Info** page enter the following information:
 - ♦ **Service URL base:**
`http://127.0.0.1:18004/ePortal/services`
 - ♦ **Portlet handle**
`number-guessing-game`
- 5 Click **Next**.
- 6 Finish publishing the channel in the same way as you do for any other channel. See the [procedure on page 75](#) for details.

Note the following information about the previous example:

- The first parameter, **http://127.0.0.1:18004/ePortal/services** is the base URL for the WSRP producer services (for example, **WSRPServiceDescriptionService**, **WSRPPortletManagementService**, and so on).
- The second parameter (**Portlet Handle**) is the identifying parameter for the channel/portlet that the consumer wants to display. You must be aware of the producer value of this parameter.

In the previous example, **number-guessing-game** is the functional name of an existing channel in ePortal. You can obtain his parameter from the channel's information by clicking on the **Modify a currently published channel** link on the **Channel Manager** panel.

5.4 Managing Groups

ePortal allows you to collect channels into groups. In the portal context, a group is a collection of channels that logically go together, based on a related purpose or interdependencies. Groups are structured in a hierarchy defined and maintained by the system Administrator.

The components of this hierarchy are:

- Categories
- Groups
- Subgroups

A *category* in ePortal is your top-level group in a group hierarchy. In ePortal, a category behaves like and has the same characteristics as a group. For more information on group hierarchy in ePortal, see [“Creating and Updating Groups” on page 89](#).

For more information on groups in ePortal and how to manage them, see [“Group Management” on page 63](#). This section explains how to create and modify groups using ePortal's **Groups Manager** panel interface features.

5.4.1 Groups Manager Panel

When you first see the Administrator Home page, the **Groups Manager** panel is displayed (see [Figure 43 on page 72](#)). This panel lets you access the ePortal group management features.

Panel Overview

The **Groups Manager** panel allows you to:

- Create and delete categories/groups
- View group information
- Edit groups (for example, modify descriptions or rename)
- Assign permissions to groups
- Add and remove group members
- View group member information
- Search for channels, persons, and groups of channels and/or persons

The **Groups Manager** panel provides views of existing groups and includes an editing mode feature that allows you to define attributes and specify permissions for new and existing groups. Using this panel, you can review and edit any group's characteristics.

Groups are organized into categories, that is, groups that share some characteristics in common (see [“Category Management” on page 62](#) for details). A category is a special group that is the parent of all groups of a particular type. The **All categories** tree on the panel contains all the categories of channels.

Categories are also used by ePortal's Search Engine to determine the types of groups that can be searched. In a typical implementation, the category contains the channel definitions for all other groups it contains.

The **Groups Manager** panel allows the Administrator to manipulate categories, groups, and subgroups, as well as specify their permissions. When you click on a group, a pop-up box allows you to view and/or edit a group's characteristics. Any channel or collection of channels can be shared by as many categories, groups, and subgroups as desired.

This same interface, along with the **Permissions Manager** panel, allows you to assign permissions to groups. By default, the Administrator is automatically granted unlimited permissions.

Note: For more information on assigning permissions, see [“Managing Permissions” on page 97](#).

Groups Manager Views and Information

The **Groups Manager** panel provides the following group-related features:

- **Group** box allows you to view a category/group's information.
- **Edit** mode allows you to update a category/group's information.
- **Add Members** box allows you to add members to a category/group.
- **Assign Permissions** box allows you to assign permissions to categories/groups.
- **Search** feature allows you to search categories/groups for information based on keywords.

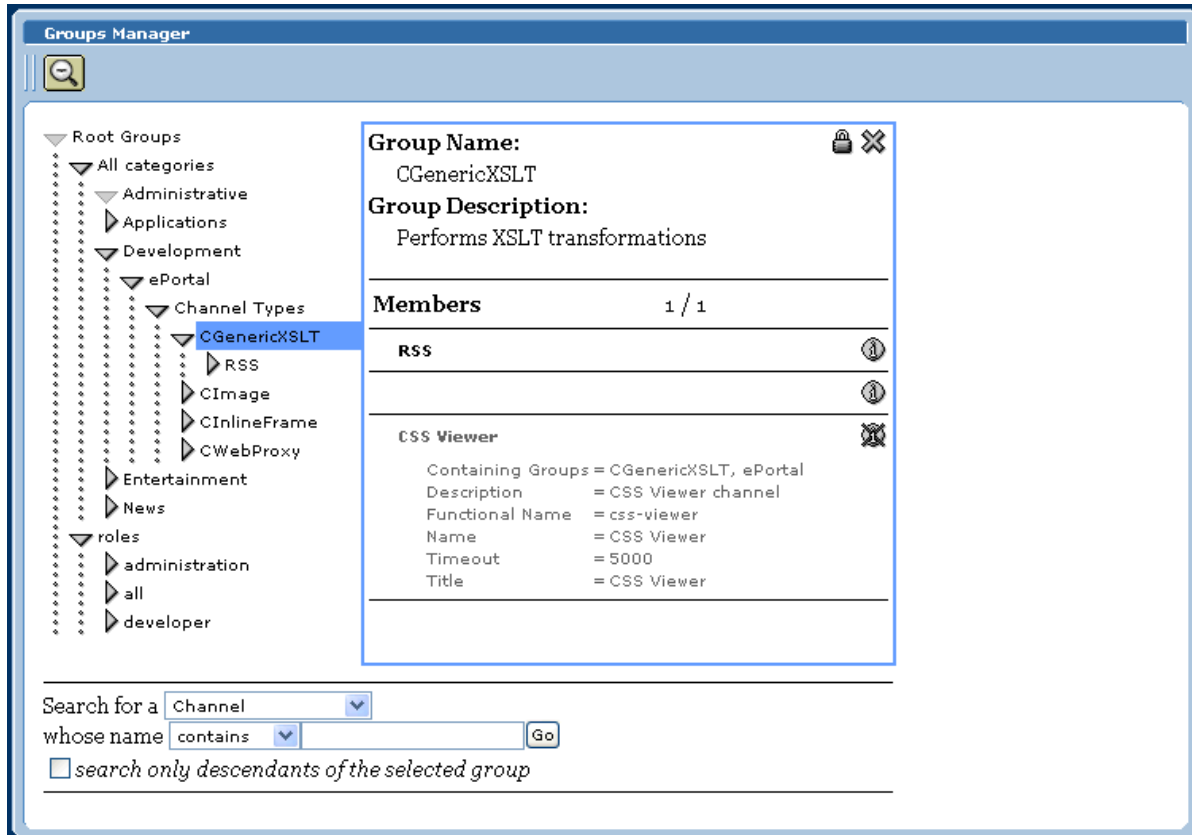
5.4.2 Creating and Updating Groups

This section explains how to create and manipulate categories and groups. Using the **Groups Manager** panel, you can view them in any of the following ways:

- To display the properties of a group member in an information panel, click the **Show Info** button.

An information box appears. See Figure 55.

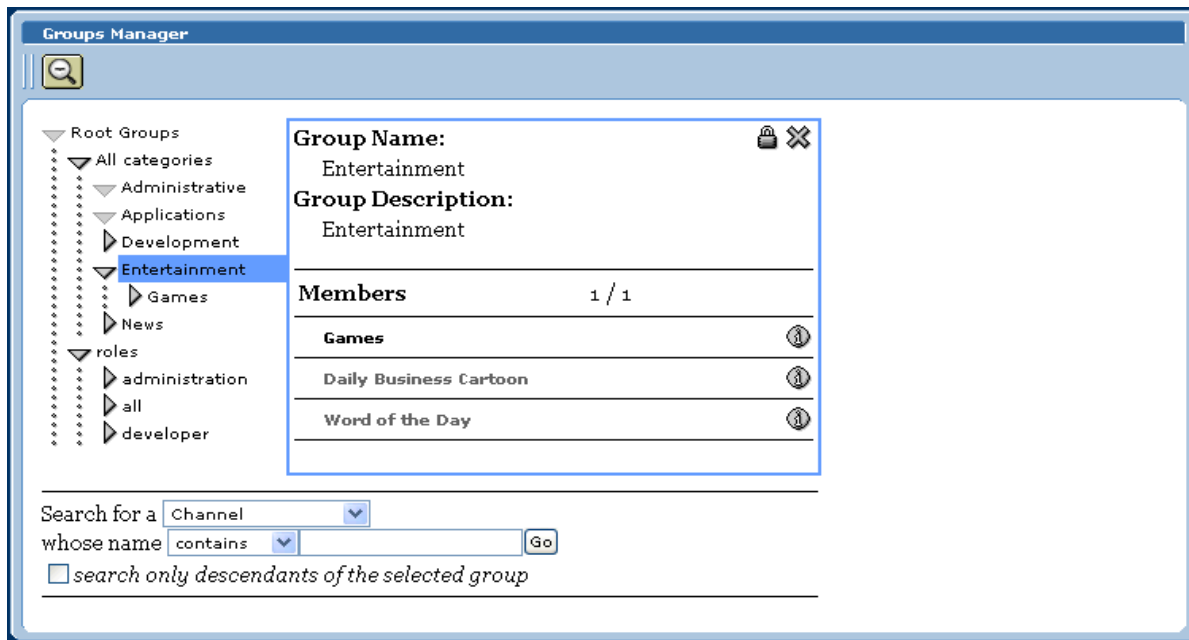
Figure 55 Group Member Information



To close the information box, click the **Hide Info** button.

- To display the details of a group, click the group's expander arrow ▶ in the **Groups Manager** panel to display the group's information. See Figure 57.

Figure 56 Group Information Box



After you click the expander arrow, it rotates to point downward, indicating the group is “open” and displaying information.


- The **Groups Manager** panel displays all of the categories. The Administrator has no viewing limitations. The Administrator sets permissions to specify which groups and subgroups the non-Administrators may see, as well as the functions available for each group member.


Creating a New Group

Groups must belong to categories. You must create a new group under an existing category. This section explains how to create and add a new group to ePortal.

See [“Category Management” on page 62](#) and [“Adding a New Category” on page 95](#) for more information on categories.

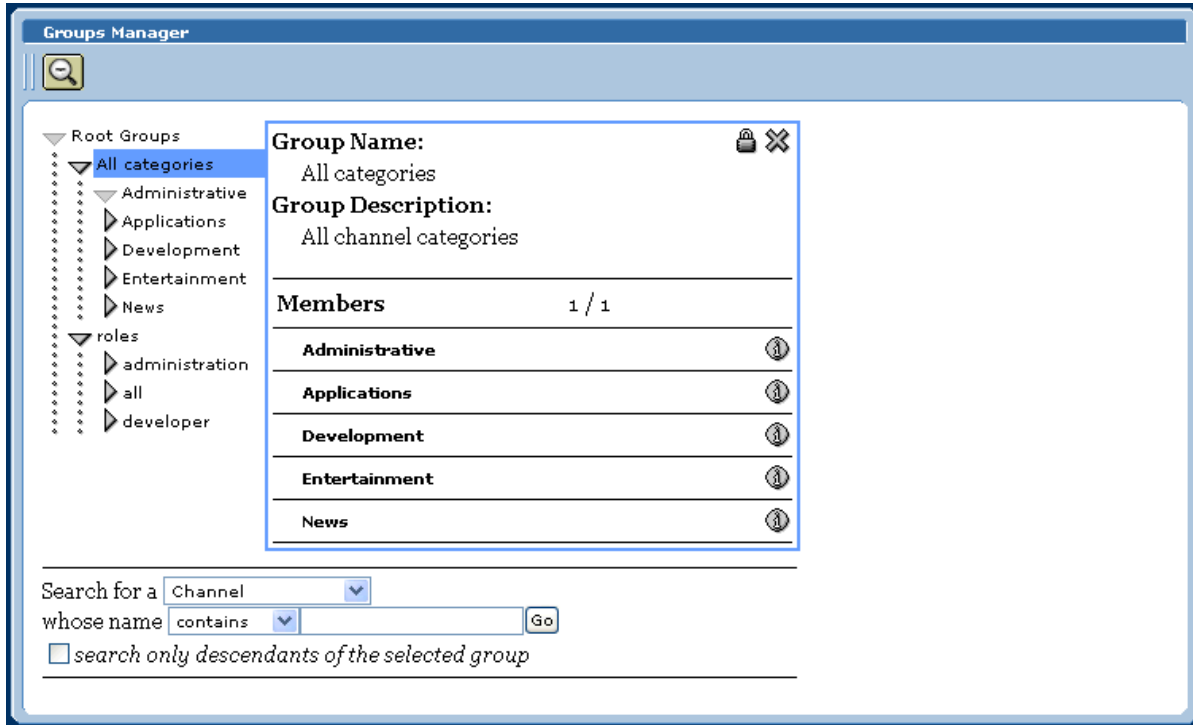
To create a new group

- 1 Start your browser and log on to ePortal as Administrator.
The Administrator’s Home page appears. See [Figure 43 on page 72](#).
- 2 On the **Groups Manager** panel, click the expander  on the left of the label for the category under which you want to create your group. This action expands a list under **all**, allowing you to view the existing groups.

If you want to create a new group under a new category, you must create the new category first. See [“Adding a New Category” on page 95](#) for details.
- 3 You can create the new group directly under the category or click the expander  to the left of a desired group, for example, **Misc**, where where you can then create a subgroup.

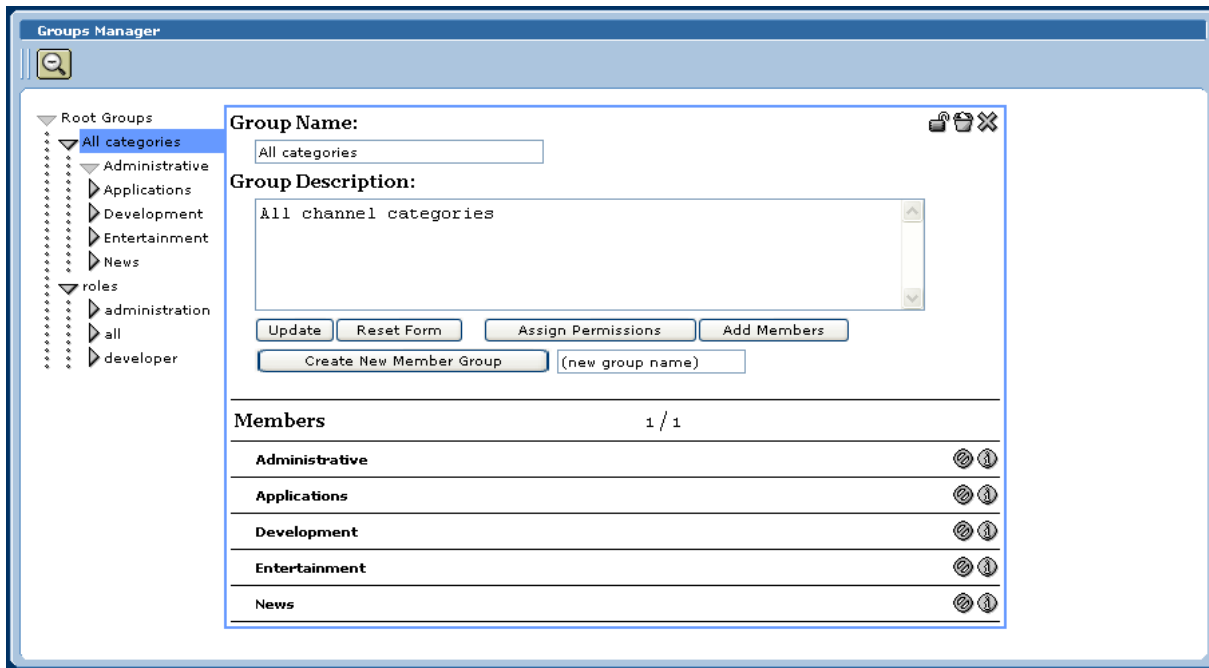
Either action displays the Group pop-up box that allows you to view characteristics of the current category. See Figure 57.

Figure 57 Category Information Box



- To begin creating a new group, click the **Edit Group** button (lock). See Figure 58.

Figure 58 Creating a New Group



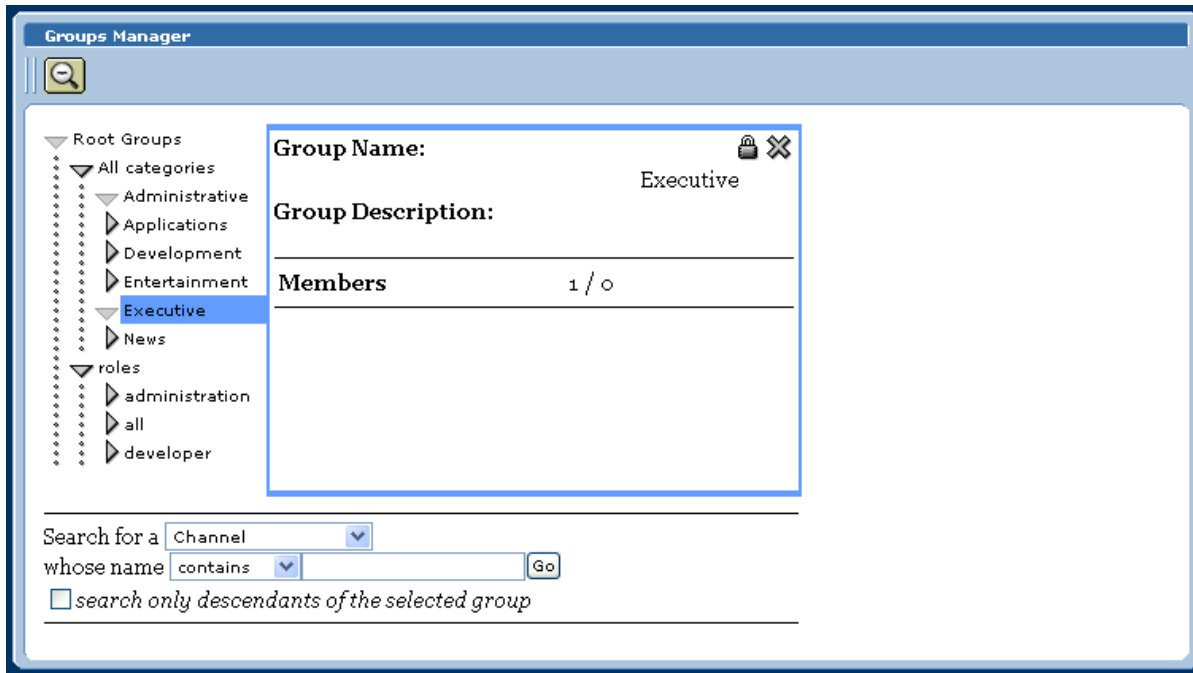
- In the **New Group Name** text box, enter a name for the group.
- In the **Group Description** text box, enter a brief description for the group.
- Click **Create New Member Group**.

The new group name is written to ePortal's database and added to the list of groups within the **Groups Manager**.

- Click the new group (**Executive** in the example).

The information for your new group displays. See Figure 59.

Figure 59 New Group Displayed





Modifying a Group

ePortal also allows you to modify existing groups. You can also do any of the following general operations when modifying groups:

- Rename a group by entering the new name for the group under **Group Name**.
- Edit the description of a group by entering the desired information under **Group Description**.
- Cancel your work and return the box to its defaults by clicking **Reset Form**.
- Update any changes to the group by clicking **Update**.

The following procedures explain how to modify a group by adding and/or deleting members.

To add or delete members of a group

- 1 Start your browser and log on to ePortal as Administrator.
The Administrator's Home page appears.
- 2 On the **Groups Manager** panel, click the expander  on the left of the **all** label, to expand the list and view the existing groups.
- 3 Click the expander  on the left of the desired group name, to expand the list and view the group you want to modify.
- 4 In the expanded list, select the group you want to modify.

- 5 In the **Detail** view, click **Add Members** to launch the **Add Members** view.
- 6 In the **Add Members** view, select a channel or category, select the appropriate check box aligned with the desired channel or category, then click **Select Marked**.
The added members display under the modified group. You can share a channel or collection of channels among as many categories, groups, or subgroups as desired.
- 7 The view is updated by placing a permanent “X” along side the selected members.
- 8 To delete a member of a group, click **Delete**.
- 9 When you are finished, click **Done with Selection**.

All selected members on the list are now members of the parent group.

5.4.3 Groups Manager Edit Mode

The edit mode in ePortal lets you to modify categories and groups, as well as their information. While you are in the edit mode, your edit tools are represented by an assortment of tool buttons. See [Table 10 on page 69](#) for a description of the Administrator’s edit mode tool buttons and how to use them.

This section explains how to create and manipulate categories/groups in the edit mode.

5.4.4 Editing Groups

The **Edit** view allows you to perform the following operations to a category or group:

- **Change:** To change the name and/or description, click **Update**.
- **Create:** To create a category, group, or subgroup, type the name of the new group in the (**new group name**) text box, and then click **Create New Member Group**.
- **Add:** To add existing groups, click **Add Members**.
- **Assign Permissions:** To assign permissions to a category/group, click **Assign Permissions**. This action launches features available on the **Permissions Manager** panel. See [“Managing Permissions” on page 97](#) for details on this feature.
- **Delete:** To delete a category/group, click the **Remove (X)** button. This action deletes the group and removes references to it from all other groups.

5.4.5 Searching Groups

You can search for any entity type contained in a category 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** check box.

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

5.4.6 Managing Categories

When you create a channel, you must assign it to a channel category. You must create a new group of channels within a category. In this context, a category is a logical collection of channels that go together, for example, having a similar or related purpose.

Channels exist within categories that the ePortal Administrator can create and modify. The top-level (master) category is called **All categories**. All individuals with any level of access to the channel are members of the **All categories** master category container. The **Groups Manager** panel provides a view of existing categories and a mechanism for the Administrator to manipulate a category's members and permissions.


Note: For more information on assigning permissions, see [“Managing Permissions” on page 97](#).

A category can contain groups and channels. This section explains how to manage channel categories.


For more information on categories in ePortal and how to manage them, see [“Category Management” on page 62](#).

Adding a New Category

To add a new category

- 1 Start your browser and log on to ePortal as Administrator.
The Administrator's Home page appears.
- 2 On the **Groups Manager** panel, click the expansion arrow  to the left of the **All categories** label, to expand the list and view the existing categories. If the list is already expanded, go to the next step.



Note: You must create your first category under **All categories**.

- 3 If necessary, click the expansion arrow  to the left of the desired category under **All categories**. You only need to do this step if you want to create a group.
- 4 Click the name of the category under which you want to create the new category.
A box appears, allowing you to begin creating a new category. See [Figure 57 on page 91](#).
- 5 Click the **Edit Group** button to expand the box. See [Figure 58 on page 92](#).
- 6 To create a new category, enter the name of the desired category in the text box next to **Create New Member Group**.



- 7 In addition, you can do any of the following actions:
 - ♦ Under the **Group Name** heading, do nothing or you can rename the current category (**All categories**).
 - ♦ Under the **Group Description** heading, type a new description for the category.
 - ♦ To add a group to the current category, click **Add Members**.
 - ♦ To assign permissions to the category, click **Assign Permissions**.
 - ♦ To save your work, click **Update**.
 - ♦ To return the box to its original state, click **Reset Form**.
- 8 Click the **X** button to close the box and save your work.
- 9 The name of your new category appears under the **All categories** column. If you want to create more categories, you can leave the box open and perform step 6 as many times as desired to create additional categories.
- 10 If you want to create subcategories (categories within categories), click the desired category to open the box shown in [Figure 58 on page 92](#). Then repeat the steps in this procedure, as desired.

Modifying Categories

To modify an existing category

- 1 Start your browser and log on to ePortal as Administrator.
The Administrator's Home page appears.
- 2 On the **Groups Manager** panel, click the expansion arrow  to the left of the **All categories** label, if necessary.
- 3 To view the category you want to modify, click the expansion arrow  to the left of the category name, for example, **Misc**.
- 4 Click the category name that you want to modify.
- 5 Do any of the actions listed under step 7 in the [procedure on page 95](#), as desired.
- 6 When you are finished, close the box.

To add groups and users to an existing category

- 1 On the **Groups Manager** panel, click the expansion arrow  to the left of the **All categories** label, if necessary.
- 2 To access the category you want to modify, click the expansion arrow  to the left of the category's name, for example, **Misc**.
- 3 Click **Add Members**.
- 4 Check the category to which you want to add groups or users.
- 5 Select the groups and users you want to add to the category.
- 6 When you are finished, close the box.

5.5 Managing Permissions

ePortal allows you to assign channel-use permissions to and categories, groups, and subgroups. This section explains how the system Administrator can assign these permissions using ePortal's **Permissions Manager** panel.

For more information on permissions in ePortal and how to manage them, see [“Permissions Management” on page 64](#).

5.5.1 Permissions Manager Panel

This section describes the **Permissions Manager** panel (see [Figure 43 on page 72](#)). The **Permissions Manager** panel provides the following options for the general use of permissions in ePortal:

- **Groups Manager:** Reserved for later use.
- **ePortal Channel Publication:** Not currently used.
- **ePortal Channel Subscription:** Allows you to assign permissions by channel subscription; operates in the same way as assigning permissions to groups.

In addition, you can assign individual permissions to groups and categories.

5.5.2 Using and Managing ePortal Permissions

Group members may have channel-use permissions assigned to them directly, or permissions can be inherited from the hierarchy of group memberships. The ePortal group mechanism allows multiple instances of permission inheritance.

By definition, the Administrator user has all permissions. Only the Administrator is allowed to assign channel-use permissions to groups and categories.

In creating groups, you must also take into account your ePortal system's predefined *roles*.

Roles

Before you begin creating ePortal groups, you have already set up the roles you want using the Enterprise Designer or the Lightweight Directory Access Protocol (LDAP). See [“Configuring LDAP Roles and Users” on page 36](#) for details on setting up authentication using LDAP.

Roles govern basic security access, for example, who is the ePortal Administrator, and serve as the foundation of how ePortal channels are accessed. Members of roles are allowed or denied access to specified channels or categories of channels. Seen in this way, ePortal categories, groups, and subgroups are an overlay that you create on top of, but not limited by, the system's predefined roles.

See [“Setting Up Authentication” on page 23](#) for an explanation of how to set up roles for ePortal using the SeeBeyond Integration Server and Enterprise Designer.

Permissions

Permissions in ePortal govern access to ePortal content, for example, channels and groups. ePortal permissions operate as follows:

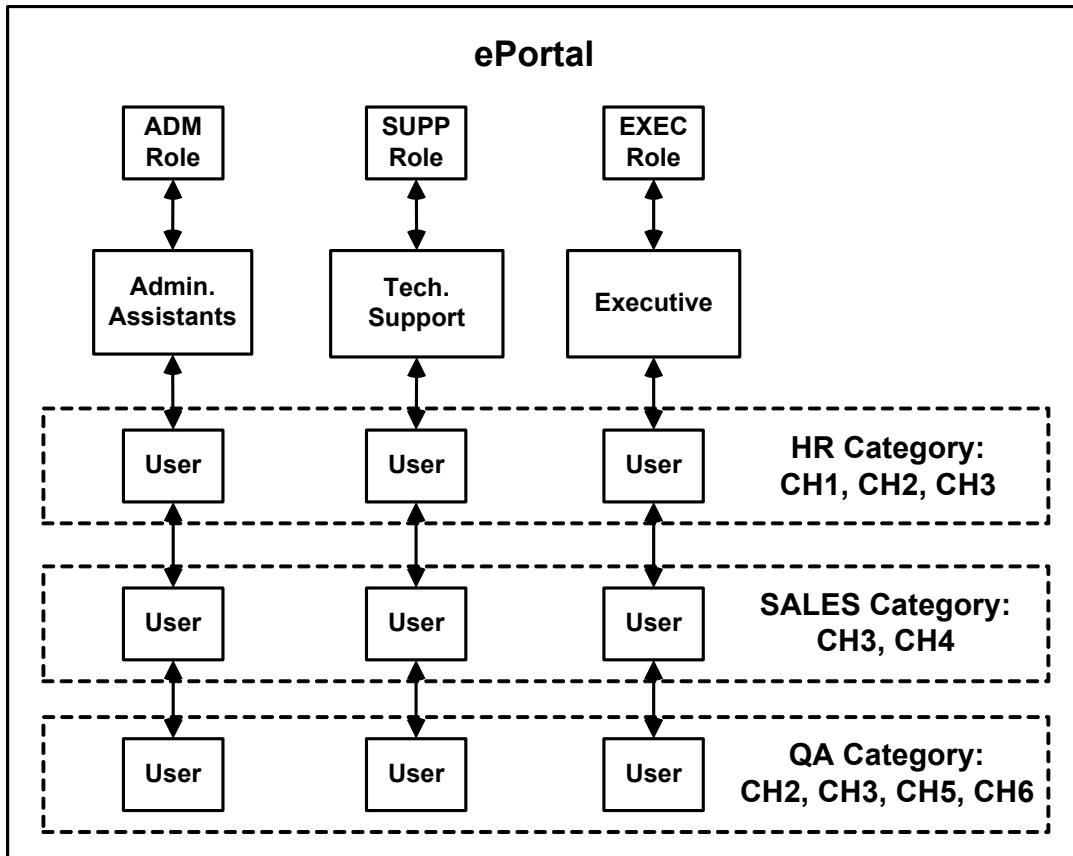
- You assign a permission to a *principal* to work with a target. A principal can be either:
 - ♦ One user
 - ♦ Two or more users

The principal can be any ePortal *group* or *group member* being allowed to use, or restricted from using, the current target.

- An *activity* can be, for example, publish, view, search, or subscribe, and can vary according to the target. The activity is what is being allowed or restricted.
- A *target* is what the activity is being applied to, for example, a channel, category, or group.
- A *category* is a set of channels that logically go together, that is, a top-level group. You can arrange channels into categories that conveniently allow you to assign multiple channels to a member group in a single action. See [“Managing Categories” on page 95](#) for details.
- Permission can be one of the following statements:
 - ♦ **Grant**, for example, a *grant* can allow a finance group to use a stock-trading channel.
 - ♦ **Deny**, for example, a *deny* can stop a search from proceeding up a selected branch.
 - ♦ **<blank>** inherits grants and/or denials from any category or group that contains the current group.

Figure 60 shows an example of how you can set up and manage a permissions structure in ePortal.

Figure 60 Managing ePortal Permissions



For example, in Figure 60, category **HR** is allowed to access channels 1, 2, and 3. In setting up this scenario, you must then *deny* each category use of or access to all other channels and skins not listed.

For simplicity, Figure 60 only lists channels. In setting up permissions for a category, you must also take into account access grants and denials for a variety of activities and targets such as searches (activities) and groups (targets).

Note in Figure 60 that you can also create the opposite setup, for example, Technical Support as a category and Human Resources as a role, and so on. Also, you can grant search permissions, as desired.

Once you have finished creating and assigning permissions to all your categories, you can create member groups within the categories, member subgroups within groups, and so on. Each of these members inherits the permissions you have assigned to the categories and groups that contain them. You can also vary the permissions of these members from their categories and higher-level groups/subgroups, if desired.

Example

In another example, you have set up the group hierarchy shown in Table 11.

Table 11 Sample Group Hierarchy

Category	Group	Channel	
News		CNN	
	News US	CNN – US	
	News Other		CNN – Europe
			CNN – Asia
			CNN – Africa
			CNN – Australia

In addition, you want to set up the following subgroups:

- U.S. Office
- U.K. Office
- Sydney Office
- Tokyo Office
- Headquarters

Finally, for the same example, you have assigned the permissions shown in Table 12. The table also shows that you can assign desired permissions to subgroups according where you place them in the hierarchy.

Table 12 Sample Permissions Setup

Category	Group	Channel	Permission	Permission Context	Applicable Subgroups	
News		CNN	Grant	Category News	Headquarters, US Office, UK Office, Sydney Office, Tokyo Office	
	News US	CNN – US	Deny	Group News US	UK Office, Sydney Office, Tokyo Office	
	News Other			<blank>	Group News Other	US Office (<blank> allows to inherit CNN from category News)
			CNN – Europe	Deny	Group News Other	Sydney Office, Tokyo Office
			CNN – Asia	Deny	Group News Other	UK Office, Sydney Office
			CNN – Australia	Deny	Group News Other	UK Office, Tokyo Office

The first line of this table assigns the **News** category to all the offices (subgroups) in the example. Afterward, all members in the offices in this example are automatically permitted to see all channels of this category and its groups and subgroups.

Subsequently, access to the **News US** subcategory is denied to all offices except for the U.S. office. Note that the Administrator has prohibited all members of the U.S. office from seeing any news that is not U.S. related. This permission excludes them from access to all three CNN News channels of the **News Other** subcategory.

Finally, access is denied per channel of the **News Other** group, for the European, Asian, and Australian offices.


5.5.3 Assigning Permissions to Groups

This section explains how to assign channel-access permissions to a group.

To assign permissions to a group

- 1 Start your browser and log on to ePortal as Administrator.

The Administrator's Home page appears.

- 2 On the **Groups Manager** panel, click the expander  on the left of an existing group, for example, **Administrator**, to expand the list of group members, if necessary.

- 3 To view the group you want to assign permissions to, click the expander  on the left of the group's name.

- 4 In the expanded list, select the member group to which you want to assign permissions.

A page appears, allowing you to select the desired operation. See [“Group Member Information” on page 89](#).

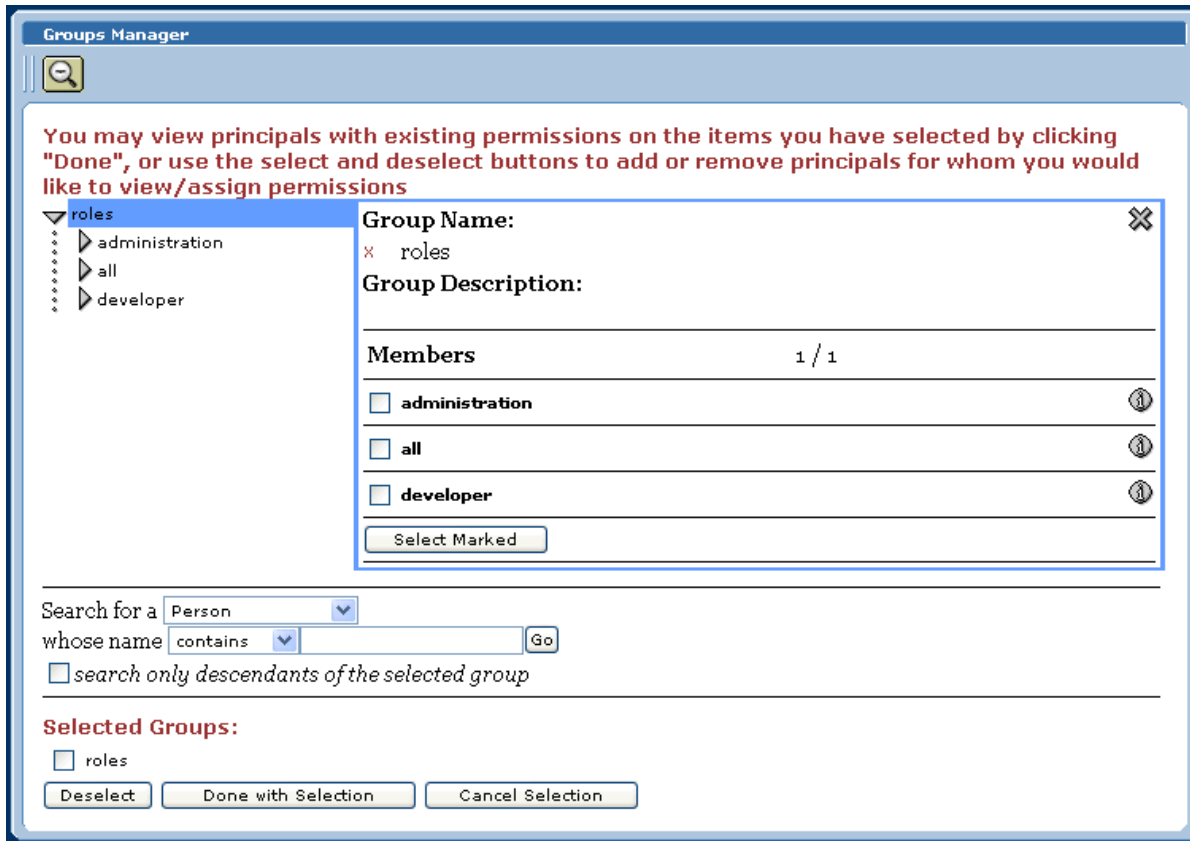
- 5 Click the **Edit Group** button.

A page appears, allowing you to edit group the selected member group. See [“Creating a New Group” on page 92](#).

6 Click **Assign Permissions**.

A page appears allowing you to select the desired groups. See Figure 61.

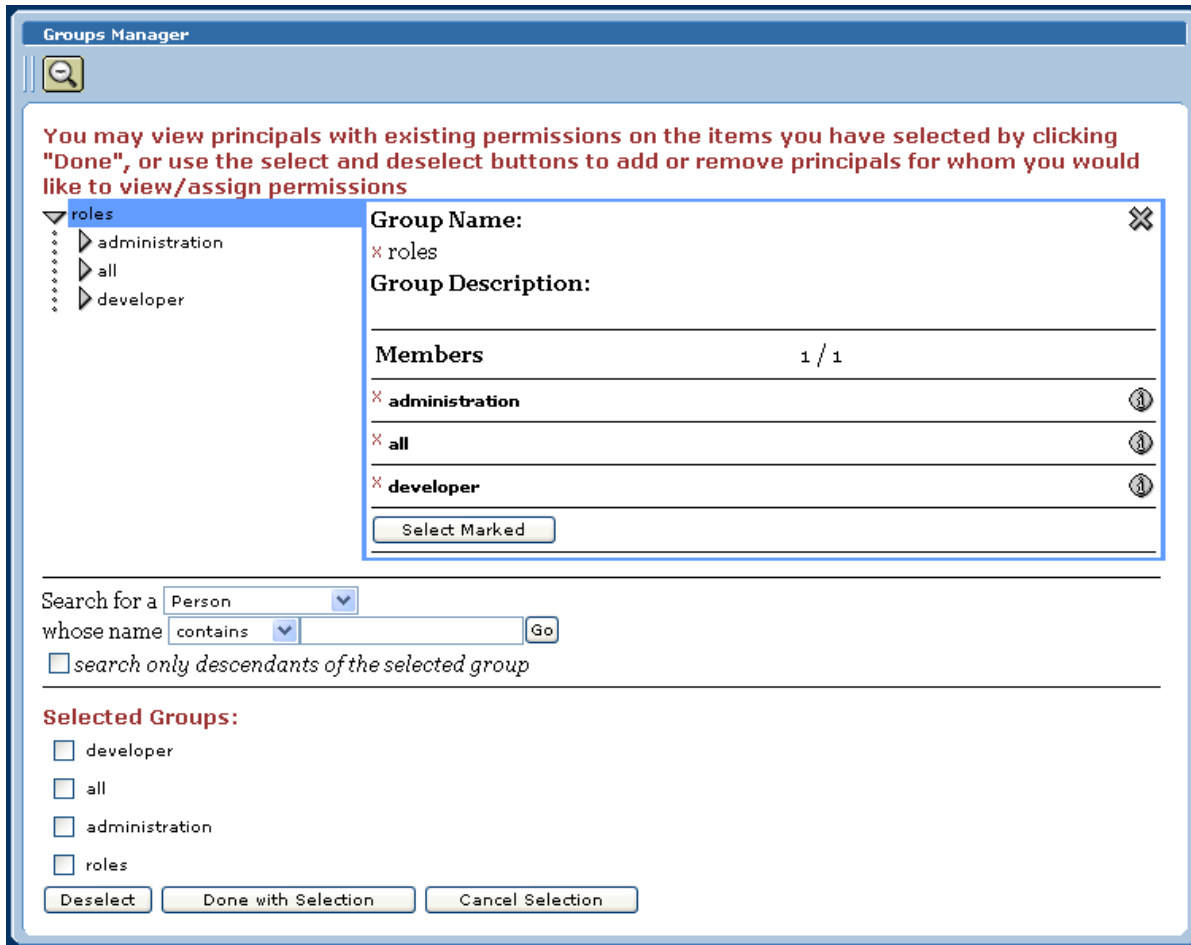
Figure 61 Permissions: Selecting Groups



7 Click **Done with Selection**.

The page changes to show your selected groups at the bottom of the page. See Figure 62.

Figure 62 Permissions: Selecting Additional Groups



- 8 To deselect any desired groups, check the appropriate check boxes then click **Deselect**.
- 9 When you are finished, click **Done with Selection**.

A page appears allowing you to grant and deny permissions. See Figure 63.

Figure 63 Permissions: Grant/deny

Assign By Owner

Groups Manager
Assign Permissions for Targets of this Owner:

Target:	Activities:						
	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
Entertainment							
Principals:							
developer (Group)	<input type="checkbox"/>	<input type="checkbox"/>	Inherits GRANT	<input type="checkbox"/>	<input type="checkbox"/>	Inherits GRANT	<input type="checkbox"/>
all (Group)	<input type="checkbox"/>	<input type="checkbox"/>	Inherits GRANT	<input type="checkbox"/>	<input type="checkbox"/>	Inherits GRANT	<input type="checkbox"/>
administration (Group)	<input type="checkbox"/>	<input type="checkbox"/>	Inherits GRANT	<input type="checkbox"/>	<input type="checkbox"/>	Inherits GRANT	<input type="checkbox"/>
Roles (Group)	<input type="checkbox"/>	<input type="checkbox"/>	GRANT	<input type="checkbox"/>	<input type="checkbox"/>	GRANT	<input type="checkbox"/>

- 10 Select the check box for the group or group members to which you want to add permissions, as well as the permissions you want to grant and/or deny. then click **Select Marked**.

Note: You can search for a person, if desired.

Under **Assign By Owner**, you set the **Grant** and **Deny** switches that are aligned with the group names in the **Target** column.

Assign by Principal is a toggle button that allows you to assign permissions by channel. Clicking this button displays a page that operates in the same way as **Assign By Owner**.

- 11 To assign group-level permissions (**Grant** or **Deny**), toggle the values in the labeled drop-down lists.

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

- ♦ Delete the group.
 - ♦ Rename the group.
 - ♦ View the group.
 - ♦ Manage the group's members.
 - ♦ Assign permissions to the group.
 - ♦ Select groups within the current group.
- 12 When the permissions are set as desired, click **Submit**.
- The permissions are written to ePortal's database.

5.5.4 Assigning Permissions to Categories

The procedures in this section explain how to assign channel-access permissions to a category. Assigning permissions to a category is similar to assigning permissions to a group.

To assign permissions to a category

- 1 Start your browser and log on to ePortal as Administrator.
The Administrator's Home page appears.
- 2 Follow steps 2 through 5 under the [procedure on page 101](#).
- 3 Click **Assign Permissions**.
A page appears allowing you to assign permissions. See [Figure 61 on page 102](#).
- 4 Select the groups to which you want to assign permissions.
- 5 To add or remove names, click **Select** and **Deselect**.
- 6 When you are finished selecting names, click **Done**.
- 7 To assign category-level permissions (**Grant** or **Deny**), toggle the values in the drop-down lists.

You can grant or deny permission to do the following actions in the context of the current category:

- ♦ Delete a group.
 - ♦ Rename a group.
 - ♦ View a group.
 - ♦ Manage a group's members.
 - ♦ Assign permissions for a group.
 - ♦ Select a group within the current category.
- 8 When the permissions are set as desired, click **Submit**.

5.6 Managing Fragments

ePortal allows you to assign *fragments* to categories, groups, and subgroups. Fragments are specially created layout designs that can have optional channel or *mandatory channel* access.

This section explains how the system Administrator can create fragments and add permissions to these fragments using ePortal's **Fragments Manager** panel.

5.6.1 Overview: Fragments in ePortal

Fragments bundle layout as well as content aspects for an ePortal page. Administrators can grant or deny permissions for an entire fragment, instead of assigning permissions for each individual channel. A fragment is a complete portal page layout design that enables you to implement mandatory channels.

Using Fragments

You are not required to use fragments or mandatory channels. Instead, you can add channels to a column inside a panel, if desired. However, fragments provide system Administrators the convenience of defining a uniform page layout and content that only allows access to specified channels.

Once you have created one or more fragments, you can then publish them to one or more desired categories, groups, or subgroups. Once a fragment is published, the fragment inherits all channels and permissions associated with each individual category/group it is associated with.

Note: *If a user tries to display a channel, but that user does not have access to it, a page rectangle appears in the channel space, but with a message saying the user does not have access.*

Users have the following privileges to modify their own fragments:

- Creating one or more columns
- Adding one or more channels to a fragment

See [“Adding a Pulled Fragment” on page 123](#) for details on how individual users can perform these operations.

Mandatory Channels

Mandatory channels are required channels for their assigned categories, groups, or subgroups. Using the **Fragment Manager**, the Administrator can create fragments with either of the following characteristics:

- **Pulled Fragment:** Optional for the user.
- **Pushed Fragment:** Required for the user.

When you, as Administrator, assign a *pushed fragment* to a category, group, or subgroup, its one or more channels become mandatory channels for that collective. Channels contained in a pulled fragment remain optional.

5.6.2 Fragments Manager Panel

The **Fragments Manager** panel (see [Figure 43 on page 72](#)) provides you with the following options:

- Creating a new fragment
- Editing an existing fragment
- Adding permissions to a fragment by assigning it to one or more groups
- Designating a fragment as pushed or pulled

The rest of this section explains how system Administrators can use the **Fragments Manager** panel to perform these operations with fragments.

5.6.3 Working With Fragments

This section explains how to create a new fragment, modify or delete an existing fragment, add permissions to a fragment and publish a fragment to categories, groups, and subgroups.

Creating Fragments

Before you can modify or publish a fragment, you must first create it. Create a new fragment using the **Fragments Manager** panel.

To create a new fragment

- 1 Start your browser and log on to ePortal as Administrator.
The Administrator's Home page appears.
- 2 On the **Fragment Manager** panel, click **Create new fragment**.

The panel expands to show additional options. See Figure 64.

Figure 64 Expanded Fragment Manager Panel

The screenshot shows a web application window titled "Fragment Manager". On the left, there is a sidebar with a search icon and two main sections: "Create new fragment" (with a document icon) and "Fragments" (with a folder icon). The main content area is titled "Fragment Management: New Fragment information". It contains the following elements:

- A heading: "Select a fragment option on the left to begin working"
- A section titled "Choose the fragment type:" with two radio buttons: "Pulled fragment" (selected) and "Pushed fragment".
- A section titled "Fragment display name:" with a text input field.
- A section titled "Fragment functional name:" with a text input field.
- A section titled "Fragment description:" with a large text area and vertical scrollbars.
- A checkbox labeled "Add a content container to the new fragment root (recommended)" which is checked.
- A "Submit properties" button at the bottom.

- 3 Under **Fragment Management: New Fragment information**, choose the desired fragment type, **Pushed** or **Pulled**.
The channels in a pushed fragment are mandatory, while those in a pulled fragment are optional.
- 4 Under the same column, enter the desired **Fragment display name** in the text box.
- 5 Under the same column, enter the desired **Fragment functional name** in the text box. ePortal uses this name for internal operations.
- 6 Enter a **Fragment description** in the text box. Enter any descriptive text you want.
- 7 Check the box labeled **Add a content container to the new fragment root**, if it is not already.
- 8 Click **Submit properties**.
The new fragment's name appears under the **Fragments** column on the left (see Figure 64).

Modifying and Publishing Fragments

Once you have created a fragment, publishing it and adding permissions to the fragment are modifications. You can do these actions immediately or later on. You can also change these features at any time. On the **Fragments Manager**, deletion is simply a modification that erases the fragment.

To modify, add permissions to, publish, or delete a fragment

- 1 Click the fragment's name under the **Fragments** column.

A list of features appears.

- 2 Access the desired feature by clicking its name.

The following list describes how to use these features:

- ♦ **Fragment Properties:** Displays the same dialog box you used to create the fragment. This feature allows you to edit any of these properties, for example, the fragment's display name.
- ♦ **Edit Content:** Allows you to edit the fragment's appearance using the ePortal user preferences features, including the User Preferences Toolbar. See ["Adding a Pulled Fragment" on page 123](#) for details.
- ♦ **Publish Fragment:** Allows you to publish a fragment to any desired category, group, or subgroup. Clicking the feature name opens a dialog box with the list of those available to publish to. Use this dialog box in the same way as the one shown in [Figure 55 on page 89](#).

Publishing a fragment to a category, group, or subgroup automatically assigns it permissions. Fragments inherit permissions from the collectives they are published to.

- ♦ **Delete Fragment:** Click the feature name to delete the current fragment. Click **OK** to confirm. Click **Refresh** and the fragment disappears.

5.7 Custom Skins

System Administrators can create one or more custom-designed skins and assign them as uniform skins for use by ePortal users. By customizing skins, you can fine-tune a portal's appearance to meet any user need.

See ["Changing the Skin of a Page View" on page 122](#) for details on how users select skins.

5.7.1 Using Custom Skins

Custom skin privileges in ePortal operate as follows:

- Only system Administrators can create, delete, or modify custom skins.
- System Administrators can select a color scheme and select and upload a logo image for a custom skin.
- After system Administrators have created custom skins, they are then available for selection by users.

5.7.2 Managing Custom Skins

This section explains how system Administrators can create, delete, and modify custom skins.

To create a custom skin

- 1 Start your browser and log on to ePortal as Administrator.
The Administrator's Home page appears.
- 2 Click **Settings On**.

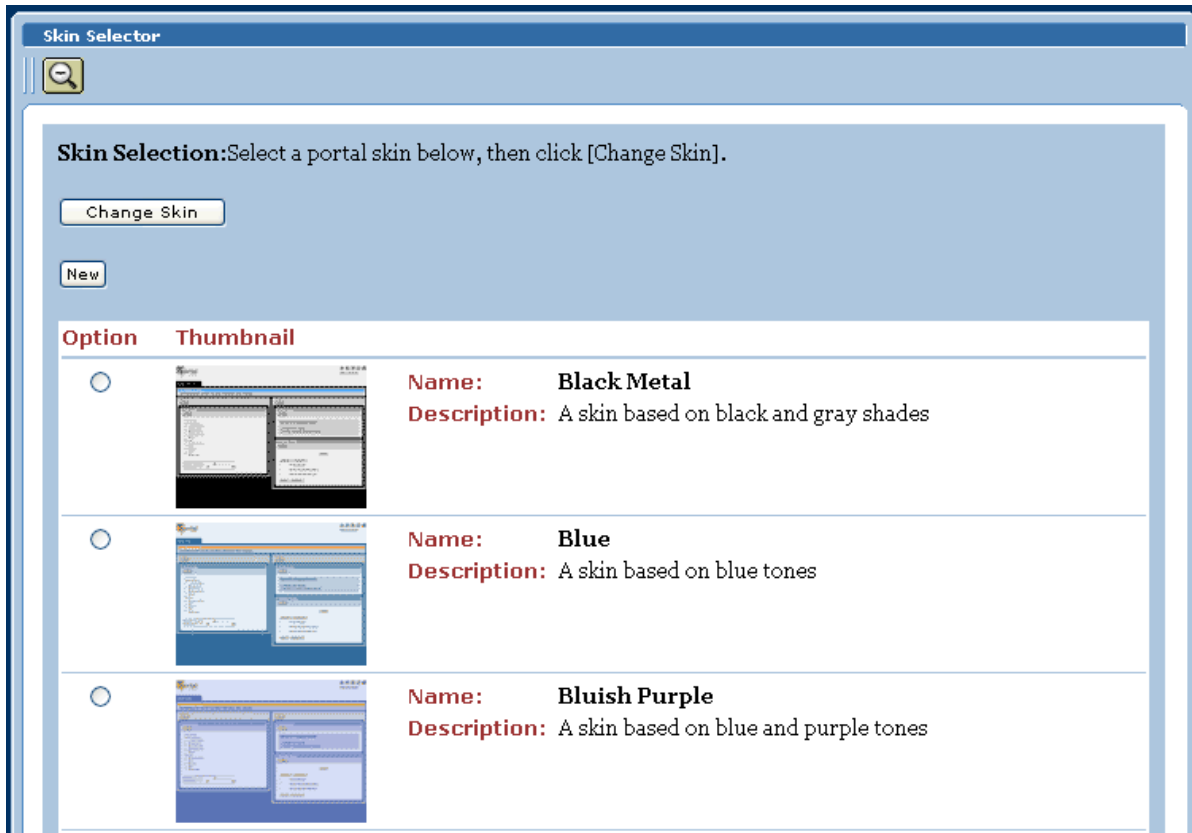
Note: This procedure is similar to choosing a skin, as explained under the [procedure on page 122](#).

The User Preferences toolbar appears. See [Figure 67 on page 115](#).

- 3 On this toolbar, click **Skins**.

The **Skin Selector** page appears. See Figure 65.

Figure 65 Skin Selector Page

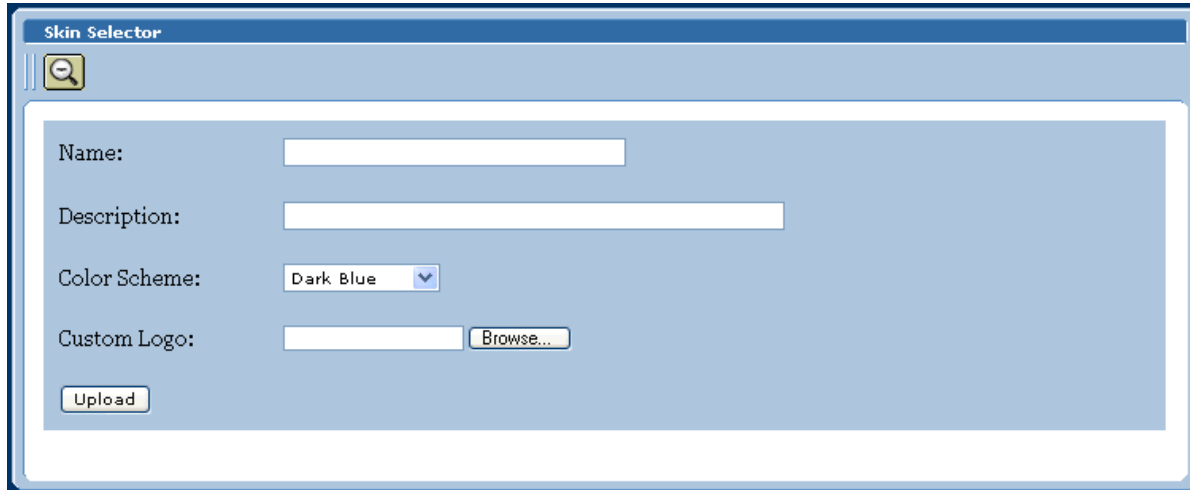


Note that, for the Administrator, this page has the button, **New**, which the ordinary user does not have.

4 Click **New**.

The **Skin Selector** dialog box appears. See Figure 66.

Figure 66 Skin Selector Dialog Box



5 Enter a name for the custom skin.

6 If desired, enter a description of the skin.

7 From the **Color Scheme** drop-down list, choose the desired color for the custom skin.

8 Under **Custom Logo**, click **Browse**.

From the resulting dialog box, navigate to the desired location and select the image file for the logo you want to include in the custom skin.

9 Click **Upload**.

You return to the **Skin Selector** page. See [Figure 65 on page 111](#).

Your new custom skin now appears as an option on this page.

10 Select the name of the desired new custom skin.

11 Click **Change Skin**.

The current skin changes, and the new skin becomes your current skin.

To delete a custom skin

1 Go to the **Skin Selector** page.

2 Choose the skin you want to delete.

3 Click **Delete**.

To modify a custom skin

- 1 Go to the **Skin Selector** page.
- 2 Delete the skin you want to change.
- 3 Create a new skin to replace the one you just deleted. For details, see the [procedure on page 110](#).

If desired, you can give the new skin the same name as the old one.

User Personalization

This chapter explains how an ePortal user can personalize a portal's page views. Through personalization, you can create different page views of business information.

Chapter Topics

- [“Overview: Personalizing ePortal” on page 114](#)
- [“Personalizing a View” on page 116](#)
- [“ePortal Search Engine” on page 124](#)

6.1 Overview: Personalizing ePortal

When a new user logs into ePortal prior to personalization (see [Figure 41 on page 67](#)), only the following options are available:

- **Home**
- **Settings On**
- **Logout**

Initially, a new user has no layouts or channel options configured for their personal display or *settings*. A layout refers to the placement of objects on a user's view of a particular channel (also called a *portlet*).

Changing personal settings operations include:

- Adding a page view with a tab
- Adding a channel
- Adding a column
- Selecting and adding a skin

All users are allowed personalization privileges. However, ePortal system Administrators may choose to restrict access to channels and fragments by use of the ePortal administration features.

System Administrators can also personalize their portal page views by clicking **Settings On**. They have additional panels to work with, **Channel Manager**, **Groups Manager**, and **Permissions Manager**, and **Fragment Manager**. Setting user preferences for these panels operates in the same way as setting preferences for any other page in ePortal.

This chapter explains how to use these user personalization features.

Home Page

The tab on the left determine's the user's Home page. See [“Adding a Tab With a Page View” on page 116](#) and [“Modifying a Tab” on page 117](#) for details on how to add and modify a tab.

6.2 User Preferences Toolbar

ePortal provides a User Preferences Toolbar that allows you to easily access features for personalizing your own preferences. See Figure 67.

Figure 67 User Preferences Toolbar



In addition, a **Save** option appears in the upper right corner of the Home page (see [Figure 68 on page 117](#)). Use this option to save your changes. When you are finished with any set of changes, be sure to click this option, or your changes may be lost.

To display the User Preferences Toolbar

- 1 Start your browser and log on to ePortal.
Your ePortal Home page appears.

Note: Before you have created any personal views in ePortal, this page is blank, with only the **Home**, **Settings On**, and **Logout** options available.

- 2 Click **Settings On**. See [Figure 41 on page 67](#).

The User Preferences toolbar appears. See Figure 67.

When the toolbar displays, you can change your user preferences. These preferences control your page view, display, and personalization settings. When you hide the toolbar, you leave the edit mode. This toolbar allows you to access the following user options:

- **Turn Preferences Off:** Hides the toolbar; toggles with **Preferences On**.
- **New Tab:** Allows you to create and modify tabbed page views.
- **New Column:** Allows you to create and modify columns within a page view.
- **Add Content:** Allows you to add or delete channels and/or fragments.
- **Skins:** Allows you choose a skin (layout) for your portal.
- **Languages:** Reserved for later use; English is the only language currently supported.

The users' (and system Administrators') tools are also represented by an assortment of tool buttons. See [Figure 42 on page 68](#). For a complete explanation of ePortal tool buttons in the normal view and edit modes, see [Table 10 on page 69](#).

6.3 Personalizing a View

This section explains operations you can use to personalize your page view in ePortal. These operations include:

- Adding a tab with a page view
- Modifying a tab
- Adding a column to a page view
- Modifying a column
- Adding a channel to a page view
- Changing the skin of a page view
- Adding a fragment

Adding a tab includes adding a personalized page view. After you have created a page view, you can access that view at any time by clicking the tab.

To cancel an operation

- To cancel your work and delete a tab, along with its associated page view, click **Delete** (see [Figure 68 on page 117](#)) at any time.

After you have finished personalizing your tabs and page views, you are ready to explore ePortal using your own user account.

6.3.1 Adding a Tab With a Page View

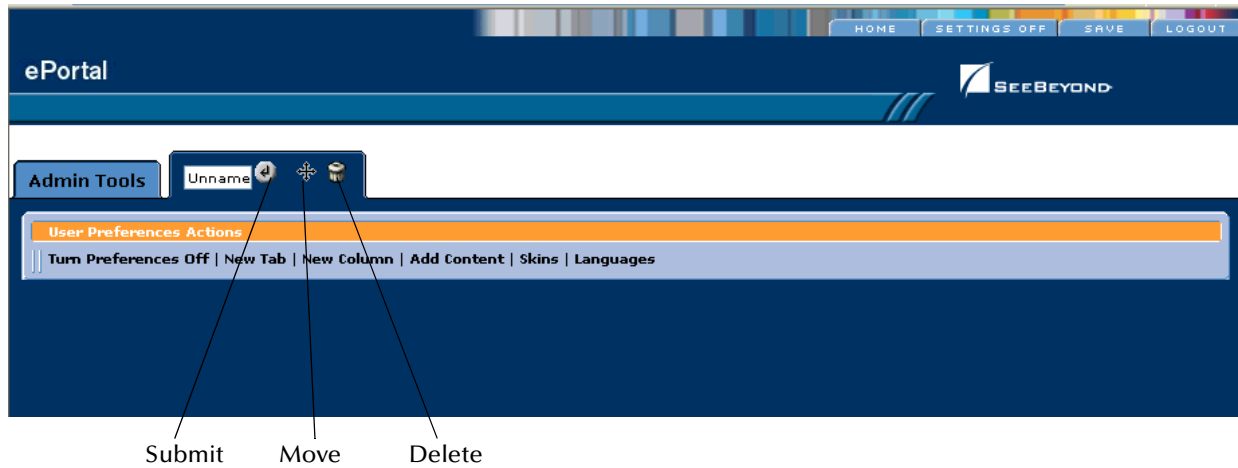
Tabs allow you to organize the channels to be presented in your page views. Each tab allows you to access a separate page view. You can add as many tabs as you want.

To add a tab with a page view

- 1 Click **Settings On** to display the User Preferences toolbar.
You can now edit your user preferences.
- 2 On the toolbar, click **New Tab**.
- 3 Click the desired tab location at the top of the page.

Your view changes, as shown in Figure 68.

Figure 68 Creating a Tab



- 4 Type a name for the tab.
- 5 Click **Submit**.
- 6 Click **Move** to move the new tab. Each time you click **Move**, the tab moves to another available location. Stop when the tab reaches the desired location.
- 7 When you are finished, click **Save**. If you do not save your changes, they can be lost.

6.3.2 Modifying a Tab

To modify a tab

- 1 Click **Settings On** to display the User Preferences toolbar.
You can now edit your user preferences.
- 2 Click the desired tab you want to modify from the row of tabs.
- 3 Do any of the following actions:
 - ♦ 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.
- 4 Click **Submit**.
- 5 When you are finished, click **Save**.

6.3.3 Adding a Column to a Page View

You can add columns to present channels in your page view. You can add as many columns to a page as you want.

To add a column to a page view

- 1 Click **Settings On** to display the User Preferences toolbar.
You can now edit your user preferences.
- 2 Display the tab and page view you want to modify.
- 3 Click **New Column** on the toolbar.
- 4 Specify a width value for the new column.

Note: The total column widths should equal 100 percent of the page.

- 5 Click the desired location of the column on the current tab and page view.
- 6 Click **Submit**.
- 7 When you are finished, click **Save**.

6.3.4 Modifying a Column

You can move and resize existing columns.

To modify a column

- 1 Click **Settings On** to display the User Preferences toolbar.
You can now edit your user preferences.
- 2 Display the tab and page view you want to modify.
- 3 Click the top of the column you want to modify.
- 4 Do any of the following actions:
 - ♦ Specify a width value for the new column.
 - ♦ Move the column.
 - ♦ Delete the column.

Note: The total column widths must equal 100 percent of the page.

- 5 Click **Submit**.
- 6 When you are finished, click **Save**.

6.3.5 Adding a Channel to a Page View

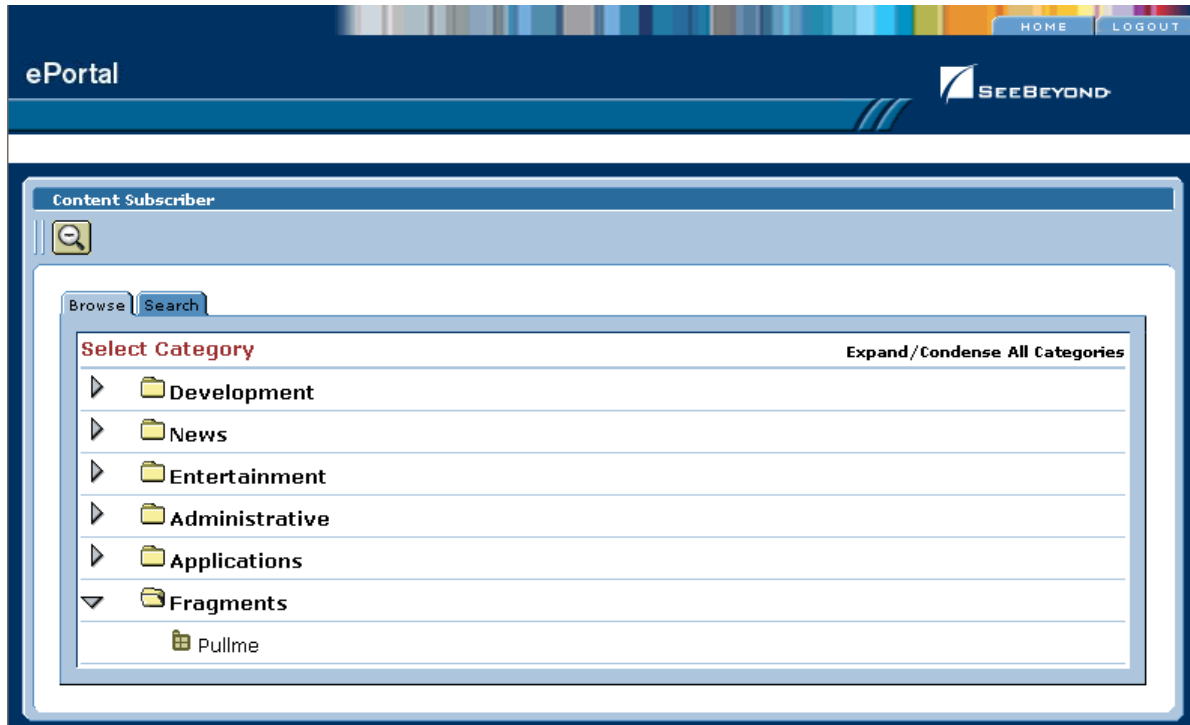
To add a channel to a page view

- 1 Click **Settings On** to display the User Preferences toolbar.
You can now edit your user preferences.

- 2 Display the tab/page view and column where you want the channel to appear.
- 3 Click **Add Content** on the toolbar.

The **Content Subscriber** panel appears. See Figure 69.

Figure 69 Content Subscriber

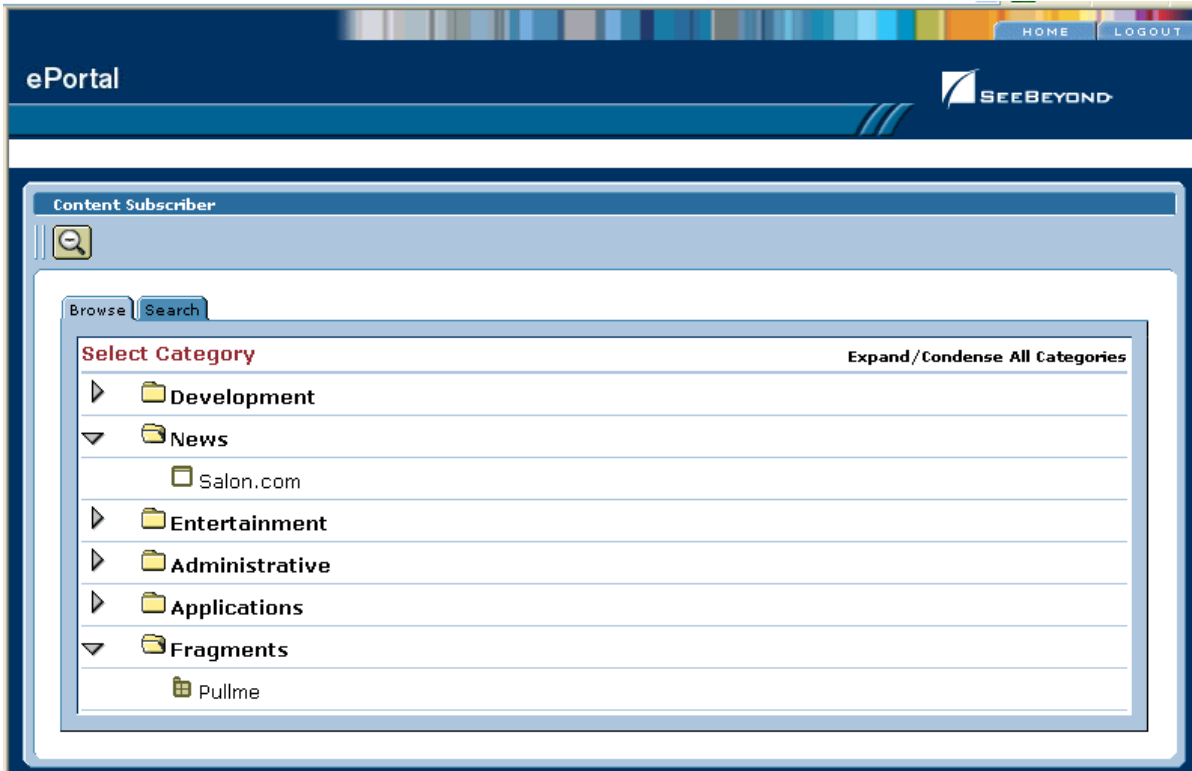


- 4 Expand the desired **Category**, for example, **News**.

A list of available channel categories and or channels under this category displays. In this example, the main category only contains a single channel. See [Figure 70 on page 120](#).

If the category contained groups, you expand each group until you find the desired channel.

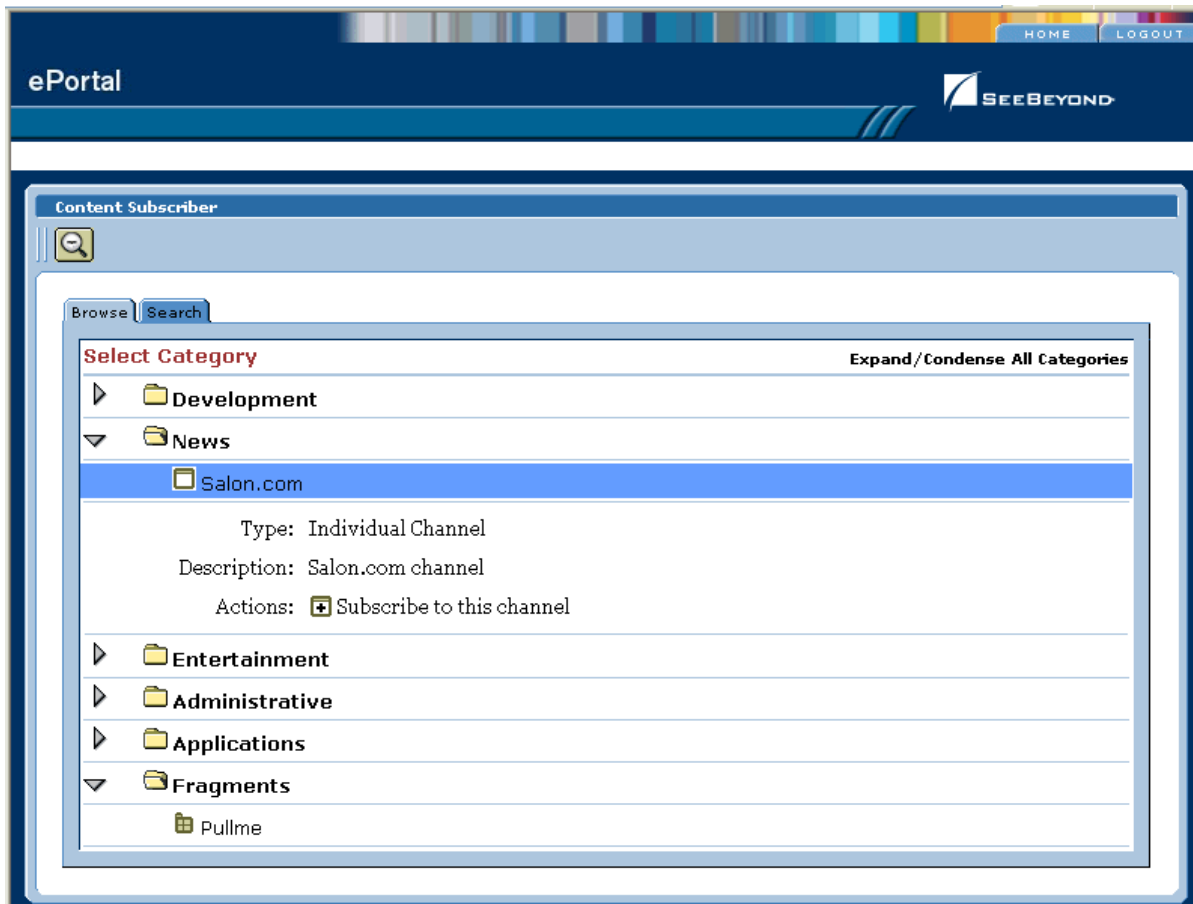
Figure 70 Available Channels Under Category



- 5 Double-click the desired channel to add.

The channel name expands to include information about that channel. See Figure 71.

Figure 71 Expanded Channel Information



- 6 Click **Subscribe to this channel**.

The channel appears on the page view and under the column you have previously displayed.

- 7 When you are finished, click **Save**.

To modify a channel in a page view

- To remove a channel, click on the **Delete** button on the top right corner of the current channel image, while in edit mode (User Preferences toolbar displayed).
- To modify the current channel, display the channel in the edit mode, and select the desired modification on the User Preferences toolbar.

To search for a channel

- 1 Display the Content Subscriber panel.
- 2 Click the **Search** tab next to **Browse**.

- 3 In the text box, enter the name of the channel you are searching for and click the **Search** button. The text box is case-sensitive.
- 4 The desired channels appear highlighted in the list on the **Content Subscriber** panel.
If no channel in the list is highlighted, your search is unsuccessful.

6.3.6 Changing the Skin of a Page View

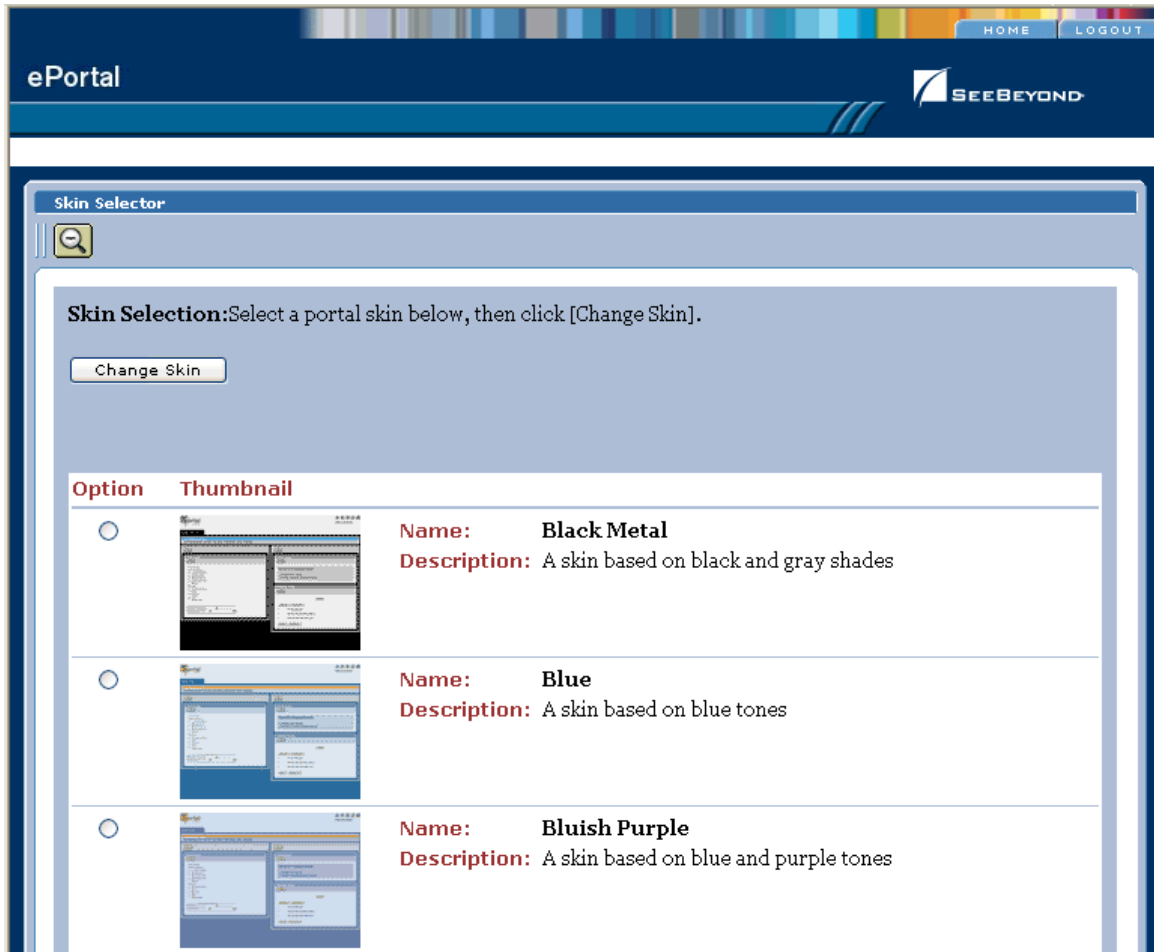
ePortal provides an initial set of template Web page skins, that is, page layouts. You can employ these skins to personalize a channel to appeal to a particular user's profile.

To change the skin of a channel user's default page view

- 1 Click **Settings On** to display the User Preferences toolbar.
You can now edit your user preferences.
- 2 Click **Skins** on the toolbar.

The **Skin Selector** panel appears. See Figure 72.

Figure 72 Skin Selector Panel



- 3 Select a skin by clicking the appropriate option button, then click **Change Skin**.
- 4 Click **Save** to keep your changes.

6.3.7 Adding a Pulled Fragment

Fragments can be pushed or pulled. If you have been assigned a pushed fragment, it and its channels are mandatory, and you cannot change it. Its page view and tab appear automatically in your personal display.

However, pulled fragments are optional, and you may or may not add them to your view, as desired. For more information on fragments, see [“Overview: Fragments in ePortal” on page 106](#).

To add a pulled fragment

- 1 Click **Settings On** to display the User Preferences toolbar.

You can now edit your user preferences.

- 2 On the toolbar, click **New Tab**.
- 3 Click the desired tab location at the top of the page.
- 4 On the toolbar, click **New Column**.
- 5 Create the desired column width and location.
- 6 On the toolbar, click **New Tab**.
- 7 Choose the desired pulled fragment for your tab view.
- 8 On the toolbar, click **Add Content**.
- 9 Choose the desired fragment from the **Content Subscriber** panel.
- 10 When you are finished, click **Save**.

Users have the following privileges to modify their own fragments:

- Creating one or more columns
- Adding one or more channels to a fragment

To create and modify columns and channels in a fragment

- You can modify fragments in the same way as you modify any other personal view and tab in ePortal.

6.4 ePortal Search Engine

This section explains how to add and use the ePortal Search Engine feature.

6.4.1 Adding a Search Engine Page View

Before you can use the ePortal Search Engine, you must first add a tabbed page view for this feature, to your personalized settings. This section describes how to create a page view for this purpose.

Before you can add the Search Engine to your page view make sure that the system Administrator has added the Search Engine channel to your available page views. See [“Publishing a New Channel” on page 75](#) for details on this operation.

Important: *The system Administrator must create an **Inline Frame** channel to point to this application.*

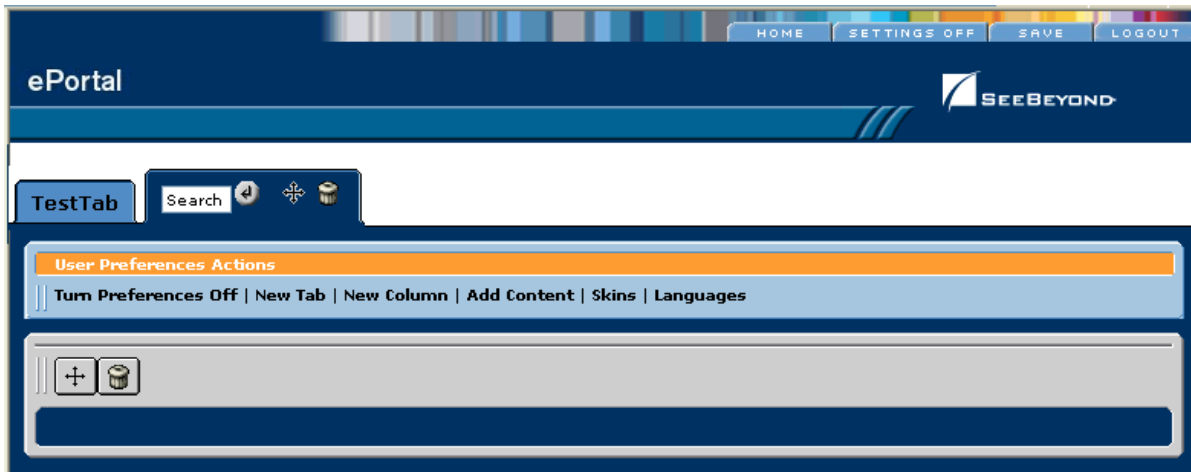
To create a new Search Engine view

- 1 Click **Settings On** to display the User Preferences toolbar.

You can now edit your user preferences.

- 2 On the toolbar, click **New Tab** and click the desired tab position. See Figure 73.

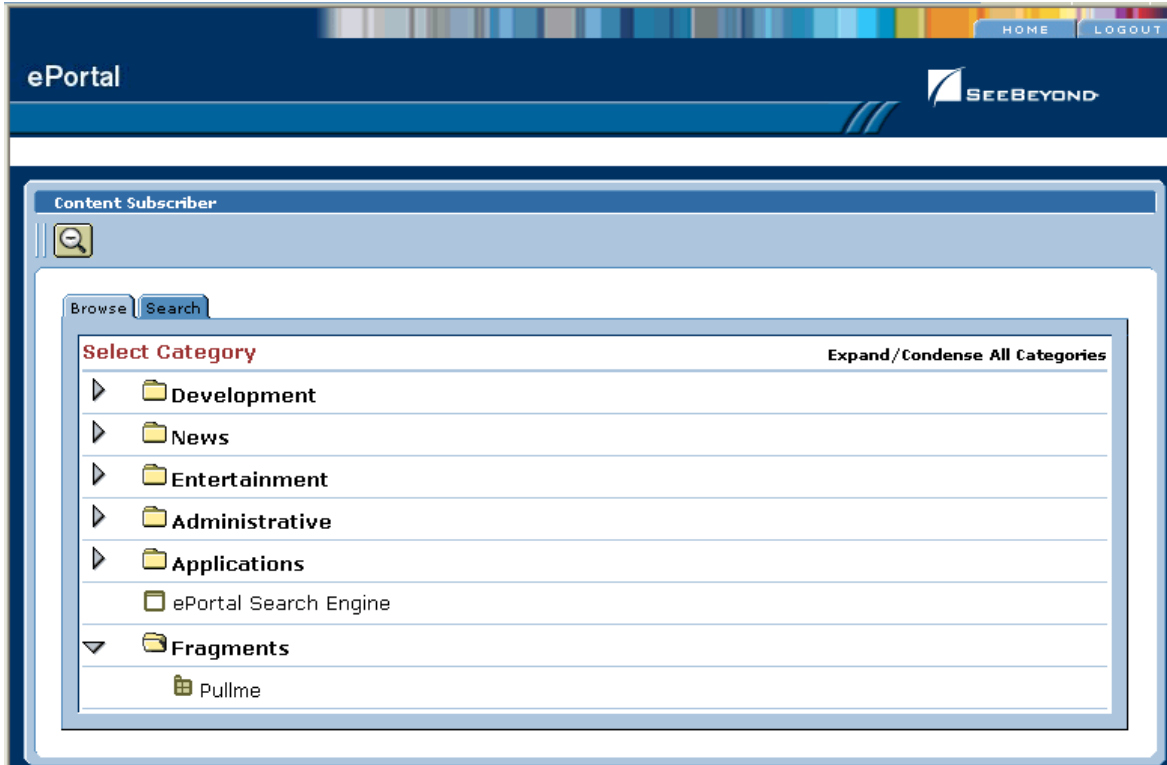
Figure 73 New Tab for Search Engine



- 3 Name the tab, for example, **Search**, and click **Submit**.
- 4 Click **Save**.
- 5 On the toolbar, click **Add Content**.
The **Subscriber Content** panel appears.

- 6 On the **Content Subscriber** panel, select the category name given to the Search Engine. If you do not know this name, consult your system Administrator. See Figure 74.

Figure 74 Search Engine Name Under Subscriber Content



- 7 Finish adding this channel to your **Search** page view and create the desired personal column and layout, in the same way as you do for any page view in ePortal. See [“Personalizing a View” on page 116](#) for details.

Now that you have added a tabbed page view for the ePortal Search Engine to your preferences, you are ready to use this feature. See the next section for more information.

6.4.2 Using the Search Engine

The ePortal Search Engine enables you to browse anywhere on your local machine or network, then upload selected files to the eGate or eInsight ESB Repository.

Use the Search Engine by browsing for the files in the Repository, in the same way as you browse for files using the Enterprise Manager (see [“Installing ePortal Using the Enterprise Manager” on page 20](#)).

When you have uploaded one or more files to the Repository, you can launch a query. The Search engine scans the Repository for files that fit the search criteria.

Example

A typical example is submitting a query for all files in the Repository that have a **.pdf** extension.

After you run the search, all files in the Repository that fit your search criteria display on a **Results** page.

Index

A

- about events 80
- add a column to a channel view 118
- administration, basic operations 72
- administration, overview 61
- application architecture 12
- application components 19
- apply a skin 123
- assign channel access permissions 101, 105
- assign channel to a category 80
- assign permission to a group 105
- assigning permissions 105
- authentication in the Enterprise Designer 24

B

- browsing a category 126
- business processes 14

C

- category
 - adding 95
 - adding groups and people 96
 - modifying 96
- category, definition 62
- channel 14
- channel categories 119
- channel creation procedure 82
- channel description 77
- channel functional name 77
- channel name 77
- channel options 114
- channel presentation 116
- channel time-out 77
- channel title 77
- channel types
 - Inline Frame 74
 - XML Transformation 74
- channel, definition 62
- Channels 95
- channels 65
- channels, managing 74
- choosing a skin 111, 112, 123

- components, ePortal 61
- configuring ePortal 22
- configuring for an external database 30
- configuring for LDAP 30
- configuring on WebSphere 40
- conventions
 - path name separator 13
 - Windows 13
- create a tab 116
- creating a channel for the search facility 124
- custom skins 109

D

- delete a group 105
- deploying on WebSphere 40
- deployment on the Integration Server 38
- document
 - conventions 12

E

- edit events 80
- Editable 80
- editing eportal.properties 27
- editing groups 94
- ePortal Composer 11
- ePortal login screen 39, 67
- ePortal Search Engine 126
- ePortal search facility 19
- eportal.properties file 19, 21
- ePortal.sar 19, 21
- external system requirements 18
- extraction 21

F

- fragment, definition 62
- fragments, managing 106

G

- group hierarchy 62, 87
- group, definition 62
- groups, managing 87

H

- Has Help 80
- height constraint 78
- help events 80

I

inline frame 77
inline frame parameters 78
installation and configuration overview 19
installation using the Enterprise Manager 20
Integrated Composite Application Network 11

L

launching a query 126
layouts 114
LDAP roles and users 36
logging on to ePortal 66
Logical Host
 Starting Manually on Windows 38
Logical Host requirements 18

M

manage a group 105
milliseconds 77
modify a column 118
modify the current channel 121
modifying a column 118

N

naming and directory interface, Java 18

O

organize the channels 116

P

packaging operations, ePortal.ear 28
page view 116
permission 105
permission, definition 62
permissions 96, 98, 105
permissions, managing 97
personalization, overview 65
personalize a portal 114
personalizing a view 116
portlet 14
prerequisites for installation 19
publish a new channel 75

Q

query documents and files 127

R

remove a channel 121
remove a channel from the category 80
rename a group 105
roles 97

S

scanning the Repository 126
Search Engine, using 124
search.war 21
SeeBeyond Web site 13
select a group 105
select groups within current groups 105
selecting a group 105
subgroup 92
supported operating systems 17
system requirements 18

T

template Web page skins 122
tool buttons 68

U

uploading files to the Repository 126
User Preferences toolbar 115
user profile. 122

V

Validate the Installation 39
view a group 105

W

Web archive file 19
Web channels 11
WebSphere configuration and deployment 40
working with fragments 107
writing conventions 12
WSRP 75, 86
WSRP channels 86