SeeBeyond ICAN Suite

ePortal Composer Installation and Channel Administration Guide

Release 5.0

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Chapter 1

Introduction

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

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

1.0.1 Document purpose and scope

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

1.1 Intended Audience

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

1.2 Organization of information

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

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

1.3 Writing Conventions

The following writing conventions are observed throughout this document.

Table 1 Writing Conventions

Text	Convention	Example
Button, file, icon, parameter, variable, method, menu, and object names.	**Bold** text	▪ Click **OK** to save and close. ▪ From the **File** menu, select **Exit**. ▪ Select the **logicalhost.exe** file. ▪ Enter the **timeout** value. ▪ Use the **getClassName()** method. ▪ Configure the **Inbound** File eWay.
Command line arguments and code samples	`Fixed` font. Variables are shown in ***`bold italic`***.	`bootstrap -p` ***`password`***
Hypertext links	**Blue** text	For more information, see **"Writing Conventions" on page 9**.

Additional Conventions

Windows Systems

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

Path Name Separator

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

1.4 Online Documentation

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

http://www.adobe.com

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

1.5 The SeeBeyond Web Site

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

http://www.seebeyond.com

1.6

Chapter 2

About ePortal Composer

This chapter provides an overview of ePortal's capabilities, and a description of ePortal's architecture

2.1 About Portals

ePortal leverages the ICAN Suite by enabling enterprise-wide access to business processes and enterprise content from a single point of entry: a portal. A portal is a programmatically-enhanced Web site that affords internal and external access to enterprise data and applications across an Intranet or the Internet. A custom portal allows the organization to present a single, *unified view* of enterprise data and applications to employees, customers, and partners.

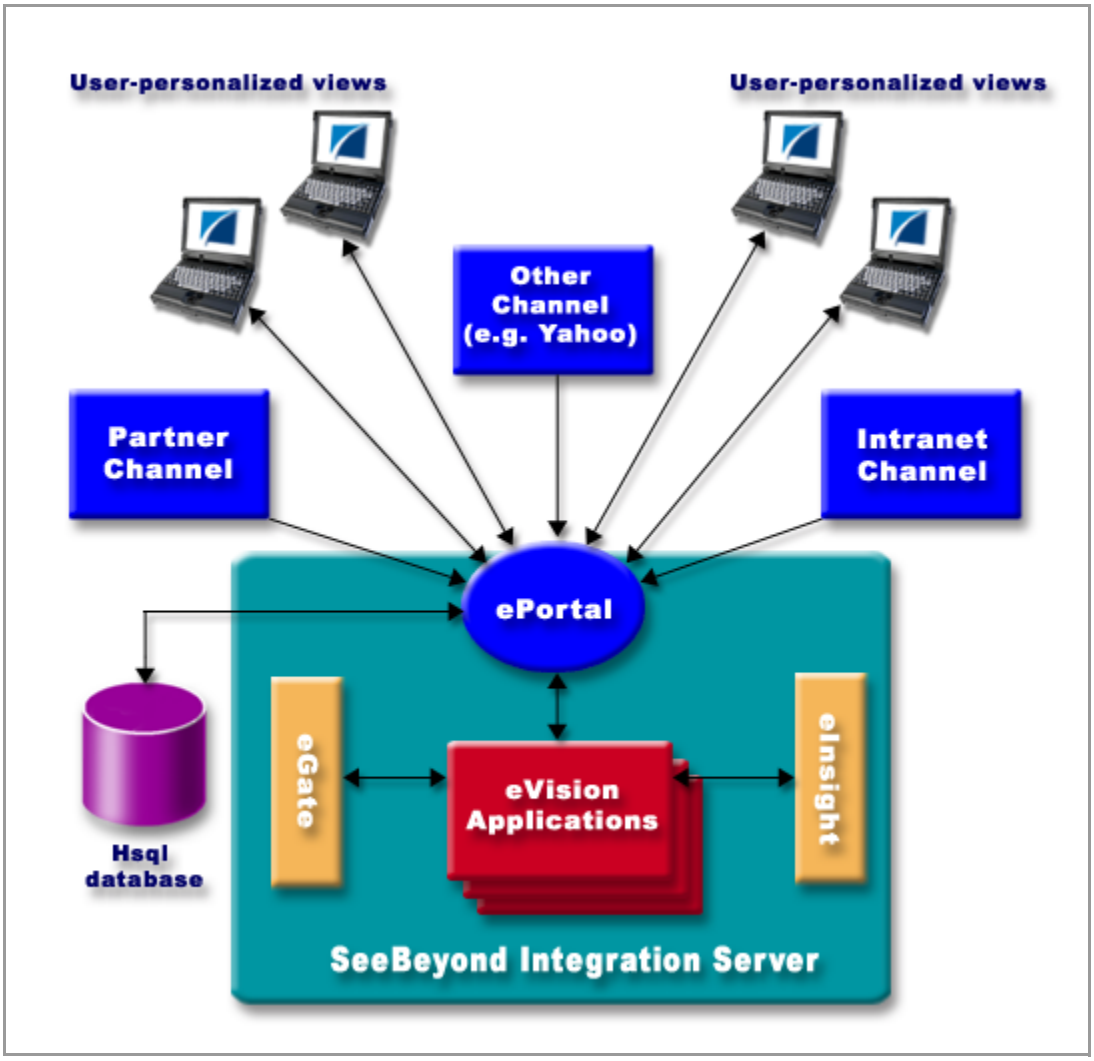
Portals may comprise several Web applications—self-contained applications with personalized content called *channels*—all of which can be presented within a single, familiar Web interface.

By personalizing a channel, the Web developer/administrator can create personalized views of business information, allowing authorized users to interact with business processes in real time, while working with only the information that they need to see. A personalized channel makes user interaction with business processes and other information more intuitive and effective. A channel can be structured to allow employees to see only the tasks that are assigned to them, log into the system and interact with those tasks, and monitor the progress of business activities.

2.2 ePortal Composer Architecture

How ePortal Composer is configured in relation to the eVision, eGate, and eInsight products is illustrated in **Figure 1 on page 12**.

Figure 1 ePortal Composer Architecture



Chapter 3

Installing ePortal Composer

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

ePortal supports the following:

- Windows 2000 and XP
- Solaris 8 and 9
- AIX 5.0 and 5.1
- HP/UX 11, 11i and TR64 5.1a
- Red Hat Linux 8
- Red Hat Linux Advanced Server 2.1

This Chapter Includes

- **"Installing ePortal Composer on Windows" on page 14**
- **"Installing ePortal Composer on UNIX" on page 19**

3.1 Prerequisites

The following is a list of prerequisite run-time components.

Web Servers

ePortal must be installed on SeeBeyond Integration Server.

Note: *To install ePortal on a SeeBeyond Integration Server, you must also have eGate Integrator fully installed at your site.*

Required Application Components

- An installed license for ePortal
- ePortal.sar (the application archive file)
- Search.war (the ePortal search facility Web archive file)
- Hqldb database 1.6.1 (distributed with ePortal Composer)

3.2 Before you begin

Installing ePortal is a manual process on both the Windows and UNIX operating systems:

- Installation procedures are executed primarily from the command line.
- Some application files must be edited using a text editor such as **Notepad** (Windows) or **vi** (UNIX).
- Make sure you have created a Logical Host containing a SeeBeyond Integration Server.
- For Windows, an archive utility such as WinZip is required.

3.3 Installing ePortal Composer on Windows

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

3.3.1 Download and Extract the ePortal Runtime Files

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

   http://<*hostname*>:<*portnumber*>

   where:

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

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

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

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

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

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

5. Click the **ADMIN** tab to begin the process of selecting and uploading ePortal Composer files to the Repository.

6 On the **Upload Component Manifest** window, click **Browse** .

7 Navigate to the **ProductManifest.xml** file and select the file.

8 **Click Submit**.

9 Click **Back to component installation** to continue.

The **Admin** page now displays a list of all the ICAN products based on the contents of the Products Manifest file.

10 Browse to the **ePortal.sar** file.

11 Click **Upload Now**.

12 When the upload is finished, click the **DOWNLOADS** tab.

13 On the **DOWNLOADS** page, click **ePortal**.

You will see the following files in a desktop window.

ePortal.sar

hsqldb.tar

hsqldb.zip

README.txt

search.war

14 On the **File Download** dialog box, click **Open**.

15 Using an archive utility (for example (WinZip), extract the contents of the **ePortal.sar** file to the **c:\ePortal** directory on your computer.

Use WinZip to create the ePortal directory.

16 The extraction process will build the ePortal folder, all the necessary sub-folders, and install all the components to run ePortal Composer.

3.3.2 Install and Start the Hsqldb Database

Note: *The order in which you start up the run-time applications is important. Do not start SeeBeyond Integration Server until the hsqldb database startup procedure is completed.*

1 On your desktop, select **Start**, and point to **Run**.

2 In the **Run** dialog box, to open a **Command Prompt**, type **cmd**.

3 On the command line, change to the **c:\ePortal** directory by typing the following command:

```
cd /ePortal
```

4 Create the directory for the **Hsqldb** database by typing the following command:

```
mkdir hsqldb
```

5 Return to your Windows session.

6 Using an archive utility (for example WinZip), navigate to **c:\ePortal\bin**.

7 Select **hsqldb.zip**.

8 On the **File Download** dialog box, click **Open**.

9 Extract the Hsqldb database files into the **c:\ePortal\hsqldb** directory.

10 Explore to the **runServer.bat** file.

11 Using a text editor, such as Notepad, edit the **runServer.bat** file.

12 Locate the line: **SET JAVA_HOME=**

13 To set the **JAVA_HOME** environment variable, append the path to the Java Runtime Environment (JRE) on the Logical Host to **SET JAVA_HOME=**, for example:

```
SET JAVA_HOME=<c:\ican50>\<logicalhost><JRE><logicalhostname>
```

where:

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

JRE is the folder containing the Logical Host JRE, and

logicalhostname is the name of the Logical Host.

14 Locate the line: **SET HSQLDB_HOME**.

15 To set the **HSQLDB_HOME** environment variable, append the path to the **hsqldb** directory to **SET HSQLDB_HOME**=, for example:

```
SET HSQLDB_HOME=c:\ePortal\hsqldb
```

16 Save and close **runServer.bat** and return to the command line.

17 Using the text editor, open the **runInit.bat** file.

18 Locate the line: **SET JAVA_HOME=**

19 To set the **JAVA_HOME** environment variable, append the path to the Java Runtime Environment (JRE) on the Logical Host to **SET JAVA_HOME=**. for example:

```
SET JAVA_HOME=<c:\ican50>\<logicalhost><JRE><logicalhostname>
```

where:

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

JRE is the folder containing the Logical Host JRE, and

logicalhostname is the name of the Logical Host.

20 Locate the line: **SET HSQLDB_HOME**.

21 To set the **HSQLDB_HOME** environment variable, append the path to the **hsqldb** directory to **SET HSQLDB_HOME**=, for example:

```
SET HSQLDB_HOME=c:\ePortal\hsqldb
```

22 Save and close **runInit.bat** and return to the command line.

23 On the command line, make sure your current directory is **c:\ePortal\hsqldb**.

24 Change to the **\bin** directory by typing the following command:

```
cd bin
```

25 Start the **Hsqldb** database (this step is mandatory), by typing the following command:

```
runServer.bat
```

The **Command Prompt** console will begin scrolling the hsqldb database startup messages.

26 To initialize a new database for the first time, or to destroy existing data and create a new database in its place, type the following command:

```
runInit.bat
```

Note: *Each time you execute **runInit.bat**, the database tables will be reinitialized and all existing data will be destroyed.*

3.3.3 How to Start the Logical Host

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

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

For example, the command

```
c:\eGate50\logicalhost\bootstrap\bin>bootstrap -h
```

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

Logical Host Startup Parameters

The startup command syntax is as follows:

```
bootstrap arguments
```

Table 2 Command Arguments for bootstrap

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

Table 2 Command Arguments for bootstrap (Continued)

Parameter	Description	Req/Opt
-n *physical host name*	The name of this Physical Host.	Required (first time only)
-p *password*	The password used for accessing the Repository.	Required (first time only)
-r *repository URL*	The root URL for the Repository containing the Logical Host data.	Required (first time only)

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

3.3.4 Start the Logical Host

To start the Logical Host

1. On your desktop, select **Start**, and point to **Run**.
2. In the **Run** dialog box, to open a **Command Prompt**, type **cmd**.
3. On your desktop, explore to the Logical Host startup file, for example:

   C:\ican50\logicalhost\bootstrap\bin
4. To start the Logical Host, on the command line, do one of the following:

- If you are starting the Logical Host for the first time, run the bootstrap command and include all of the required parameters shown in **"Command Arguments for bootstrap" on page 17**..
- If you are starting the Logical Host after having started it at least once previously, do the following:

  A. Navigate to **c:\eGate50\logicalhost\bin**.

  B. Double-click **bootstrap.bat**.

3.3.5 Deploy ePortal onto the Logical Host

To deploy the ePortal application files, copy the **ePortal.war** and **search.war** files to the Logical Host deployment directory, for example:

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

where:

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

logicalhostname is the name of the Logical Host.

3.3.6 Validate the Installation of ePortal Composer

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

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

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

   where:

   localhost is the name of the host machine, and

   port is port number assigned to the hogical host.

   For example:

   http://localhost:18003/ePortal/

   In a successful installation, you will see the ePortal **login** screen.
3. On the **login** screen, log in as Administrator as follows:

   username: **Administrator**

   password: **STC**

3.4 Running ePortal After the Installation

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

1. Start the hsqldb database. See **"Install and Start the Hsqldb Database" on page 15**.
2. Start the Logical Host.See **"Start the Logical Host" on page 18**.
3. Log into ePortal. See **"Validate the Installation of ePortal Composer" on page 19**.

3.5 Installing ePortal Composer on UNIX

1. On your UNIX machine, to create a directory for the ePortal files, type the following command:

   ```
   mkdir ePortal
   ```
2. Using FTP or a shared file system, copy the following files into the **/ePortal** directory on your UNIX machine:

   - **ePortal.sar**
   - **hsqldb.tar**
   - **README.txt**

- **search.war**

3.5.1 Start the Hsqldb Database

Note: *The order in which you start up the run-time applications is important. Do not start SeeBeyond Integration Server until the Hsqldb database startup procedure is completed.*

1. On the UNIX machine, change to the **ePortal** directory by typing the following command:

   ```
   cd /ePortal
   ```

2. To create the directory for the Hsqldb database, type the following command:

   ```
   mkdir hsqldb
   ```

3. Copy the hsqldb.tar to the hsqldb directory by typing the following command:

   ```
   cp hsqldb.tar hsqldb/
   ```

4. Change to the **hsqldb** directory by typing the following command:

   ```
   cd hsqldb
   ```

5. Extract the hsqldb files to the current directory by typing the following command:

   ```
   tar xf hsqldb.tar
   ```

6. On your UNIX machine, change to the Hsqldb database **/bin** directory by typing the following command:

   ```
   cd bin
   ```

7. Using a text editor (such as **vi)**, edit the **runServer.sh** file.
8. Locate the line: **JAVA_HOME=**
9. To set the **JAVA_HOME** environment variable, append the path to the Java Runtime Environment (JRE) on the Logical Host to **JAVA_HOME=**. for example:

   JAVA_HOME=<***path***>/<***jre***>

   where:

   path is the full path to the Logical Host JRE, and

   jre is the directory containing the JRE.

10. Locate the line: **HSQLDB_HOME**.
11. To set the **HSQLDB_HOME** environment variable, append the path to the hsqldb directory to **HSQLDB_HOME**=, for example:

    HSQLDB_HOME=<***path***>*/hsqldb*

    where:

    path is the full path to the **hsqldb** directory.

12. Save and close **runServer.sh** and return to the command line.
13. Using a text editor, edit the **runInit.sh** file.

14 Locate the line: **JAVA_HOME=**

15 To set the **JAVA_HOME** environment variable, append the path to the Java Runtime Environment (JRE) on the Logical Host to **JAVA_HOME=**. for example:

```
JAVA_HOME=<path>/<jre>
```

where:

path is the full path to the Logical Host JRE, and

jre is the directory containing the JRE.

16 Locate the line: **HSQLDB_HOME**.

17 To set the **HSQLDB_HOME** environment variable, append the path to the **hsqldb** directory to **HSQLDB_HOME**=, for example:

```
HSQLDB_HOME=<path>/hsqldb
```

where:

path is the full path to the **hsqldb** directory.

18 Save and close **runInit.sh** and return to the command line.

19 Make the shell scripts executable by typing the following command:

```
chmod +x runServer.sh runInit.sh
```

20 In the **bin** directory, start the database by typing the following command:

```
./runServer.sh
```

21 To initialize a new database for the first time, or to destroy existing data and create a new database in its place, type the following command:

```
./runInit.sh
```

The console will begin scrolling the Hsqldb database startup messages.

Note: *Each time you execute **runInit.bat**, the database tables will be reinitialized and all existing data will be destroyed.*

3.5.2 Start the Logical Host

To start the Logical Host

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

```
cd /home/my_user_name/egate50/logicalhost/bootstrap/bin
```

2 Run the bootstrap script using the following command:

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

See **Logical Host Startup Parameters** on page 17 for a complete list of the command-line arguments. *Remember that the Logical Host service will continue to run until you manually shut it down.*

3 Copy **ePortal.sar** and **search.war** into your Logical Host deployment directory.

3.5.3 Validate the Installation of ePortal Composer

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

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

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

   where:

   ***localhos*t** is the name of the host machine, and

   port is port number assigned to the hogical host.

   For example:

   http://localhost:18003/ePortal/

   In a successful installation, you will see ePortal **login** screen.
3. On the **login** screen, log in as Administrator as follows:

   username: **Administrator**

   password: **STC**

3.6 Running ePortal After the Installation

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

1. Start the hsqldb database. See **"Start the Hsqldb Database" on page 20**.
2. Start the Logical Host.See **"Start the Logical Host" on page 21**.
3. Log into ePortal. See **"Validate the Installation of ePortal Composer" on page 22**.

Chapter 4

Portal Administration: Managing Categories

When you create a channel, you must assign it to a channel category. In this context, a category is a logical collection of channels that "go together" for example, having a similar or related purpose. Like groups, a category can contains other categories as well as groups, sub-groups, and channels. This chapter describes how to create and manage channel categories.

4.0.1 Before you Begin

Only SeeBeyond Enterprise Portal Server administrators are allowed to create and modify categories. The following procedures assume that you have ePortal Composer administrator privileges.

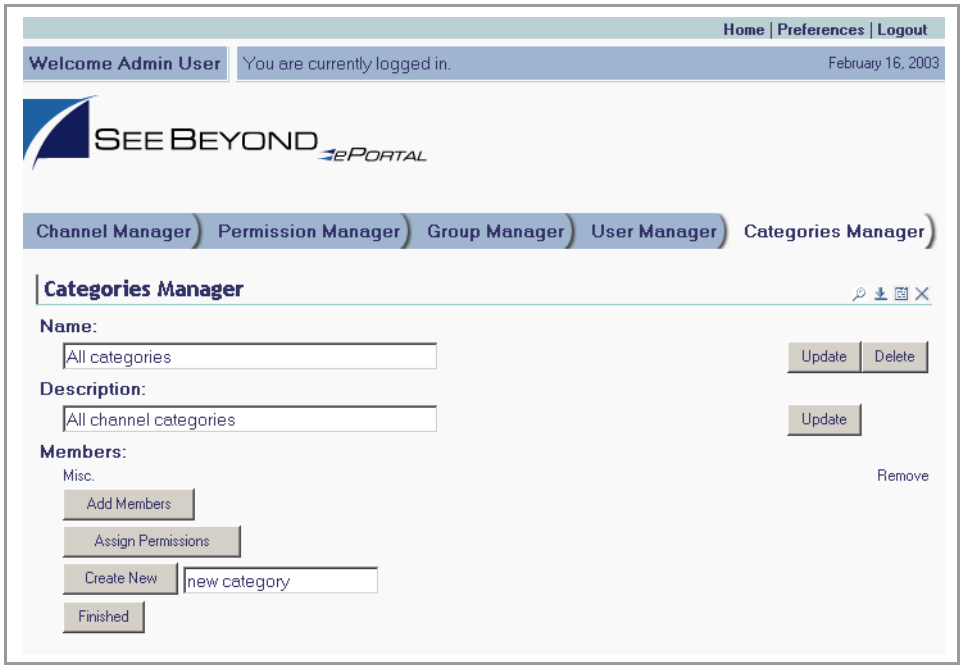
4.1 Creating a New Category

To add a new category, do the following:

1. Start your Browser.
2. Go to **http://localhost:8080/ePortal Composer**.
3. On the **Login** page, type the administrator user name and password, for example:
   - Username = **admin**
   - Password = **admin**
4. On the **ePortal Composer Home** page, select the **Categories Manager** tab.
5. On the **Categories Manager** page click the expansion arrow ▶ to left of the **All categories** label.
6. Select the **All categories** link.
7. To create a new category, select the **Create New** field, type a new category name, and click **Create New**.

   See **Figure 2 on page 24**.

Figure 2 Creating a category



4.2 Modifying Categories

Channels exist within categories that the SeeBeyond Enterprise Portal 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 **Categories Manager** page provides a view of existing categories and a mechanism for the administrator to manipulate a category's members and permissions.

Adding a Category to an Existing Category

This section describes adding a sub-category (a category within a category) to an existing category.

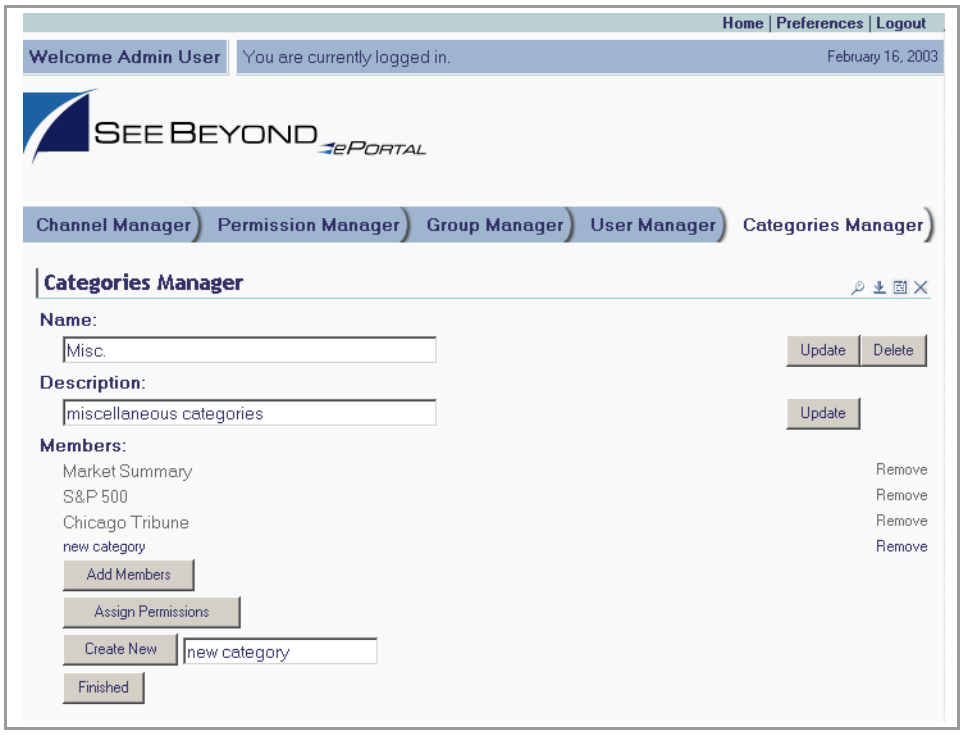
1. On the **ePortal Composer Home** page, select the **Categories Manager** tab.
2. On the **Categories Manager** page click the expansion arrow ▶ to left of the **All categories** label.
3. To access the category you want to modify, click the expansion arrow ▶ to the left of the category's name, for example: **Misc**.

   The categories within the **Misc**. category are listed.
4. Click the category name link, for example: **Misc**.

5 To create a new sub-category within the **Misc.** category select the **Create New** field, type a new category name, and click **Create New**.

See Figure 3.

Figure 3 Adding a category name



The new category name is added to the list under the **Misc.** category.

Modifying an Existing Category

This section describes how to change the attributes of an existing category.

1 On the **ePortal Composer Home** page, select the **Categories Manager** tab. See **Figure 4 on page 26**.

2 To expand the list to view the existing categories, click the expansion arrow ▶ to the left of the **All categories** label.

3 To view the category you want to modify, click the expansion arrow ▶ to the left of the category name.

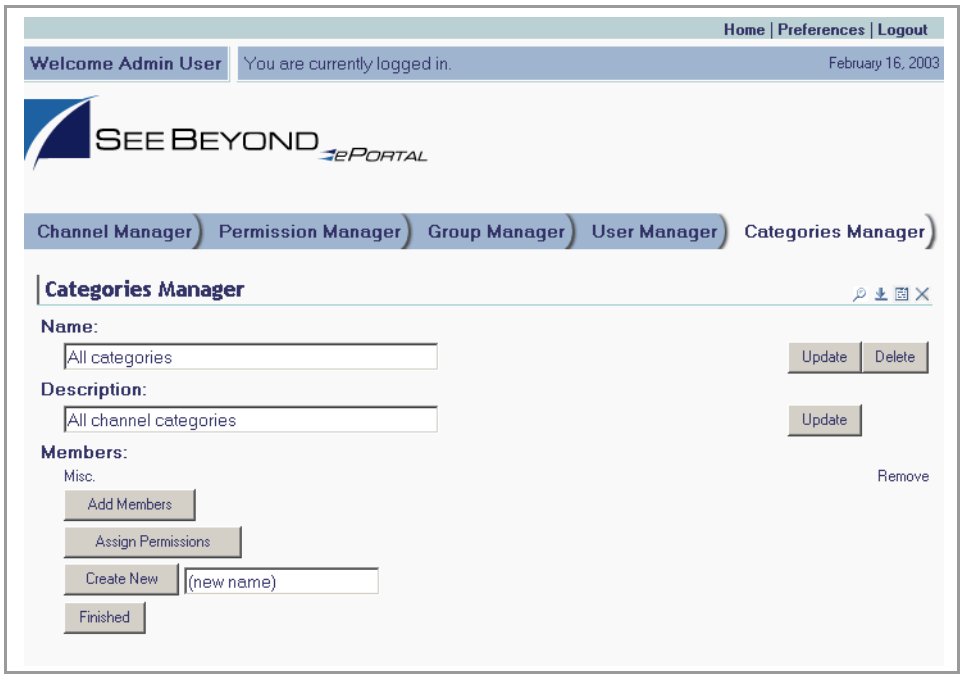
4 Click the category name that you want to modify.

5 Do any of the following:

- Under the **Name** heading, type a new name for the category.
- Under the **Description** heading, type a new description for the category.
- To add a category to the current category, click **Add Members**.

- To assign permissions to the category, click **Assign Permissions**.
- To create a new category, click **Create New**.

Figure 4 Modifying a category



6 Click **Finished**.

Add Groups and People to an Existing Category

This section describes how to add groups and people to an existing category.

1 On the **ePortal Composer Home** page, select the **Categories Manager** tab. See **Figure 5 on page 27**.

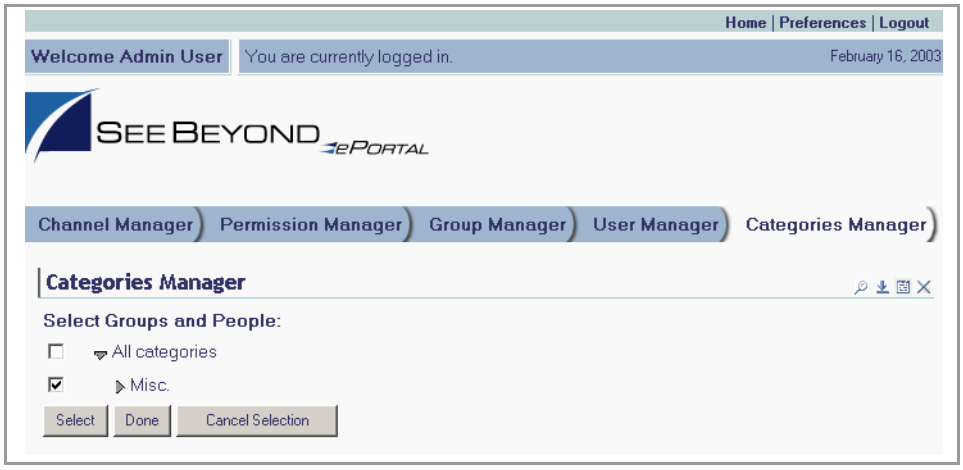
2 To expand the list to view the existing categories, click the expansion arrow ▶ to the left of the **Everyone** label.

3 To access the category you want to modify, click the expansion arrow ▶ to the left of the category's name, for example: **Misc**.

4 Click **Add Members**.

5 Check the category to which you want to add groups or people.

Figure 5 Adding groups, adding people



6 Select the groups and people you want to add to the category.

7 Click **Done**.

Assigning Permissions to an Existing Category

This section describes how to assign permissions to a category.

1 On the **ePortal Composer Home** page, select the **Categories Manager** tab. See **Figure 6 on page 28**.

2 To expand the list to view the existing categories, click the expansion arrow ▶ to the left of the **Everyone** label.

3 To view the category you want to modify, click the expansion arrow ▶ to the left of the category's name.

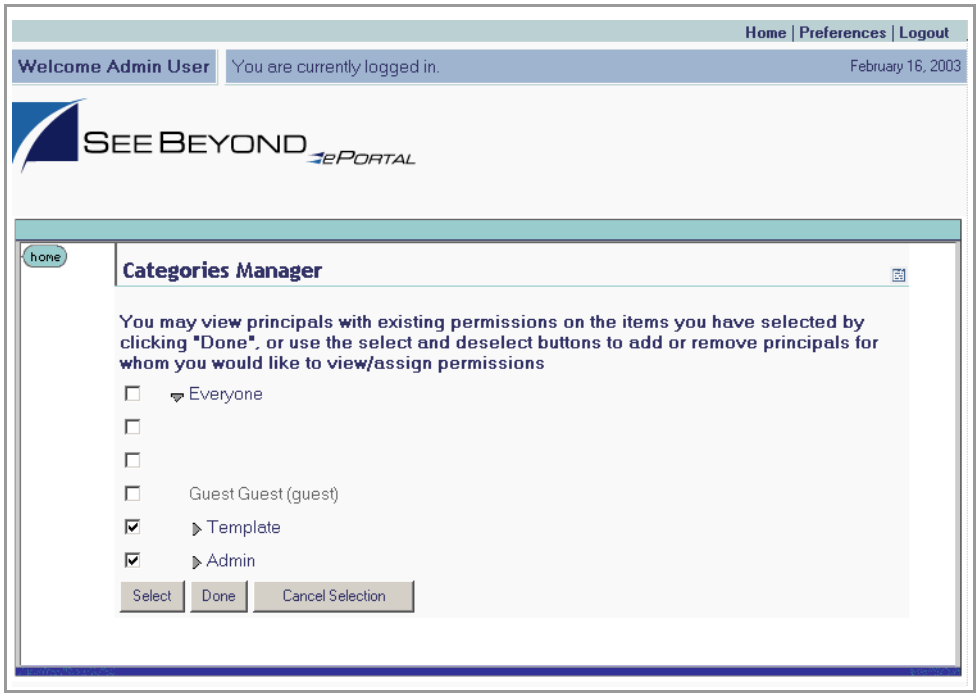
4 From the expanded list, click the category or sub-category you want to modify.

5 Click **Assign Permissions**.

6 Select the groups to which you want to assign permissions.

7 To add or remove names, click **Select** and **Deselect**.

Figure 6 Adding permission to a group



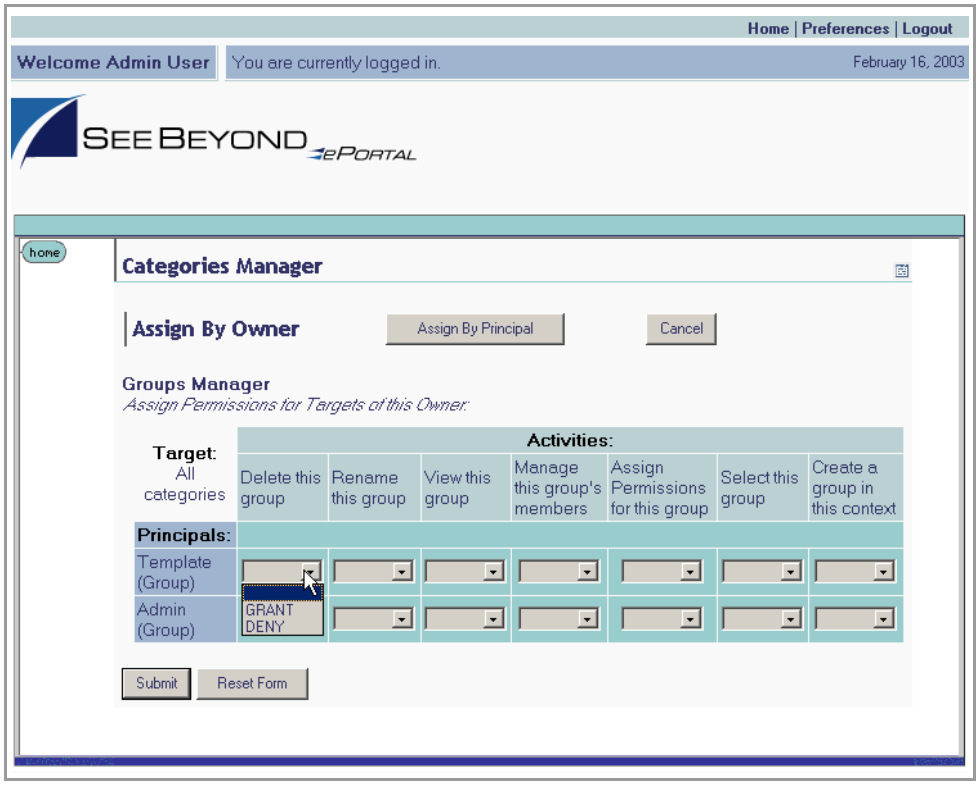
8 When you are finished selecting names, click **Done**.

9 To assign category-level permissions (**Grant** or **Deny**), toggle the values in the drop-down lists. See **Figure 7 on page 29**.

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

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

Figure 7 Assigning category-level permissions



10 When the permissions are set, click **Submit**.

Chapter 5

Portal Administration: Managing Groups and Users

This chapter describes how to manage groups and users in ePortal Composer.

5.0.1 Before you Begin

Only SeeBeyond Enterprise Portal Server administrators are allowed to create and modify groups and to add, edit, and lock users. The following procedures assume that you have SeeBeyond Enterprise Portal Server administrator privileges.

5.1 Adding a User

Using ePortal Composer to add a user is described below.

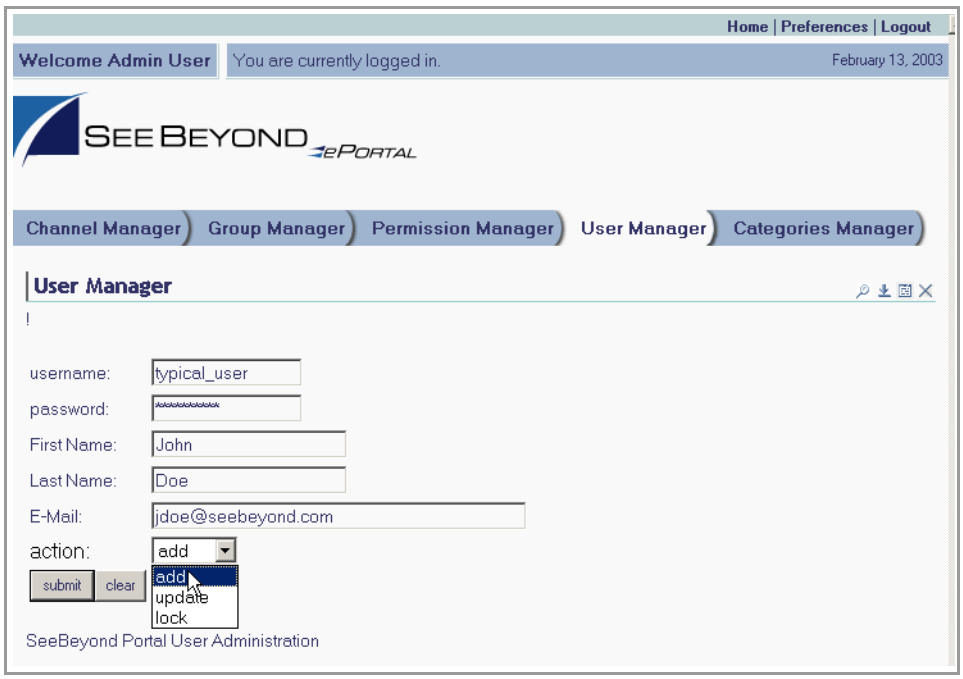
Log Into ePortal Composer

1. Start your Browser.
2. Go to **http://localhost:8080/ePortal Composer**.
3. On the **Login** page, type the administrator user name and password, for example:
   - Username = **admin**
   - Password = **admin**

Add a New User

4. On the **ePortal Composer Home** page, select the **User Manager** tab.
5. On the **User Manager** page, type the required information in the labeled fields. See **Figure 8 on page 31**.

Figure 8 Adding a user



- **User Name—**the short name that the user will provide to the Web server in order to log into the channel.
- **Password—**the password that the user will provide to the Web server in order to log into the channel.
- **First Name—**the user's actual first name. The user name and password are attached to the combination of the user's first and last names.
- **Last Name—**the user's actual last name.
- **E-Mail—** the user's e-mail address
- **Action—**what you wish to do with the user. For example:
  - **Add** to add the user to the channel.
  - **Lock** to lock a user out of the channel.
  - **Update** to change the user's username and/or password.

Note: *Updating a user consists of changing the user name and/or password only.*

5.2 Creating and Modifying Groups

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

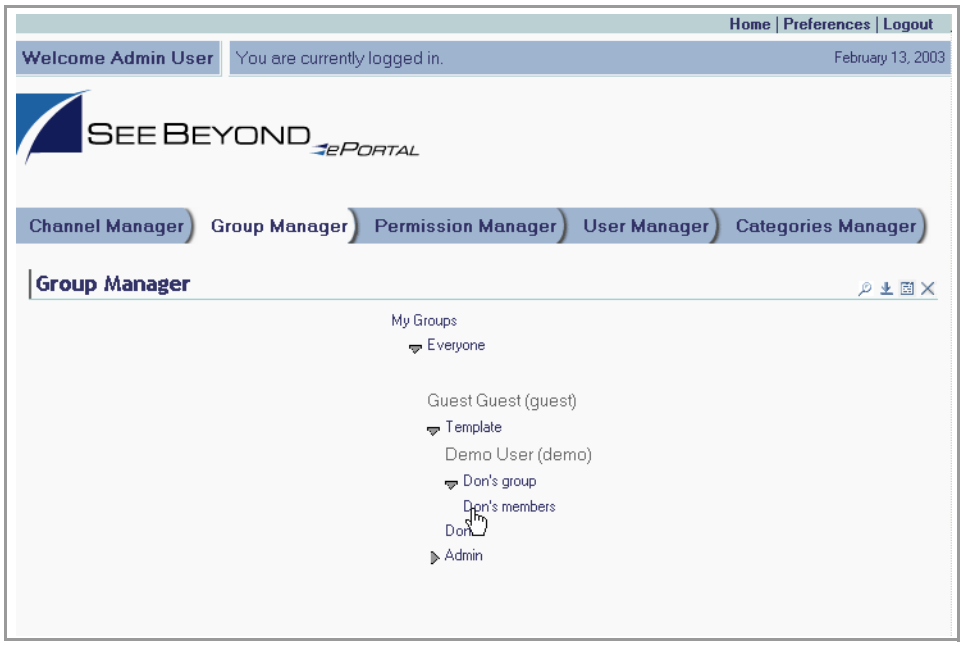
Adding a Sub-group to an Existing Group

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

1 On the **ePortal Composer Home** page, select the **Group Manager** tab. See Figure 9.

2 In the **Group Manager** area, under the **Groups** heading, click the expansion arrow ▶ to the left of the **Everyone** label to expand the list of groups.

Figure 9 Adding a sub-group

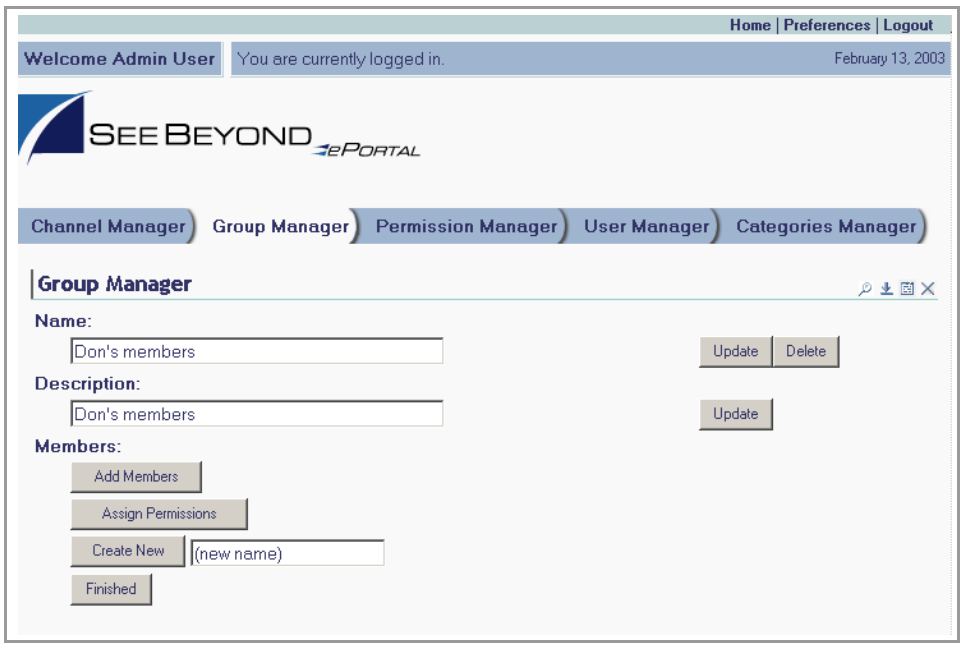


All groups are subordinate to the **Everyone** master group.

3 To expand a group listing, click the expansion arrow ▶ to the left of the group name, for example: **Template**.

4 To create a new sub-group within the selected group, select the **Create New** field, type a new sub-group name, and click **Create New**. See **Figure 10 on page 33**.

Figure 10 Creating a new sub-group



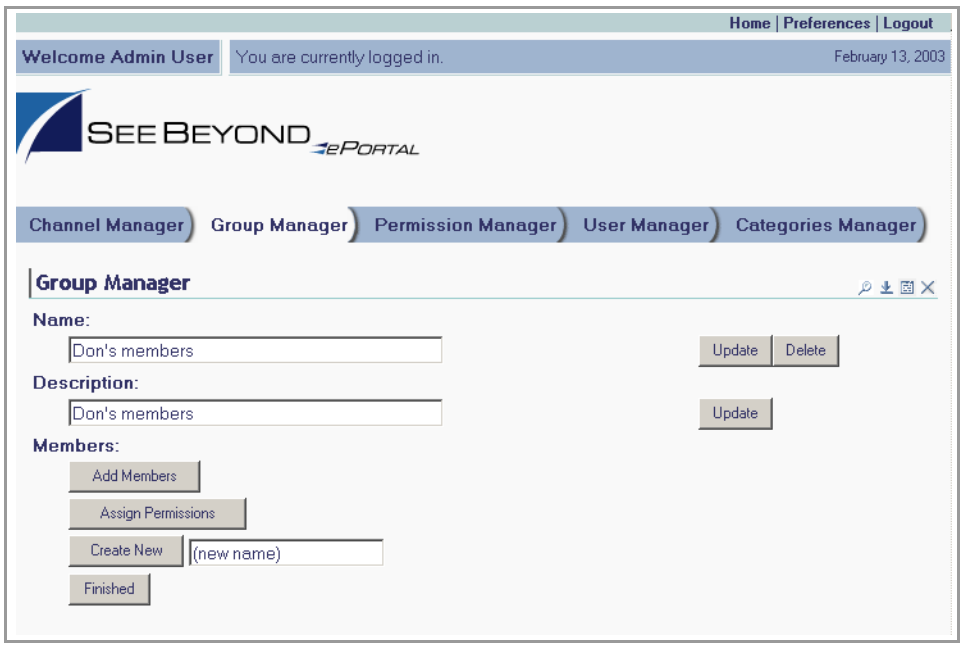
Under the **Members** heading, the new sub-group name is added to the group list.

Modifying an Existing Group

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

1. On the **ePortal Composer Home** page, select the **Group Manager** tab. See **Figure 11 on page 34**.
2. To expand the list to view the existing groups, click the expansion arrow ▶ to the left of the **Everyone** label:.
3. To view the group you want to modify, click the expansion arrow ▶ to the left of the group name.
4. Select the sub-group you want to modify.

Figure 11 Modifying a group



5 Do any of the following:

- Under **Name**, type a new name for the group.
- Under **Description**, modify the group's description.
- To add a member to the group, click **Add Members**.
- To assign permissions to the group, click **Assign Permissions**.
- To create a new group, click **Create New**.

To Add Members to an Existing Group

This procedure describes how to add a user to an existing group.

1 On the **ePortal Composer Home** page, select the **Group Manager** tab. See **Figure 12 on page 35**.

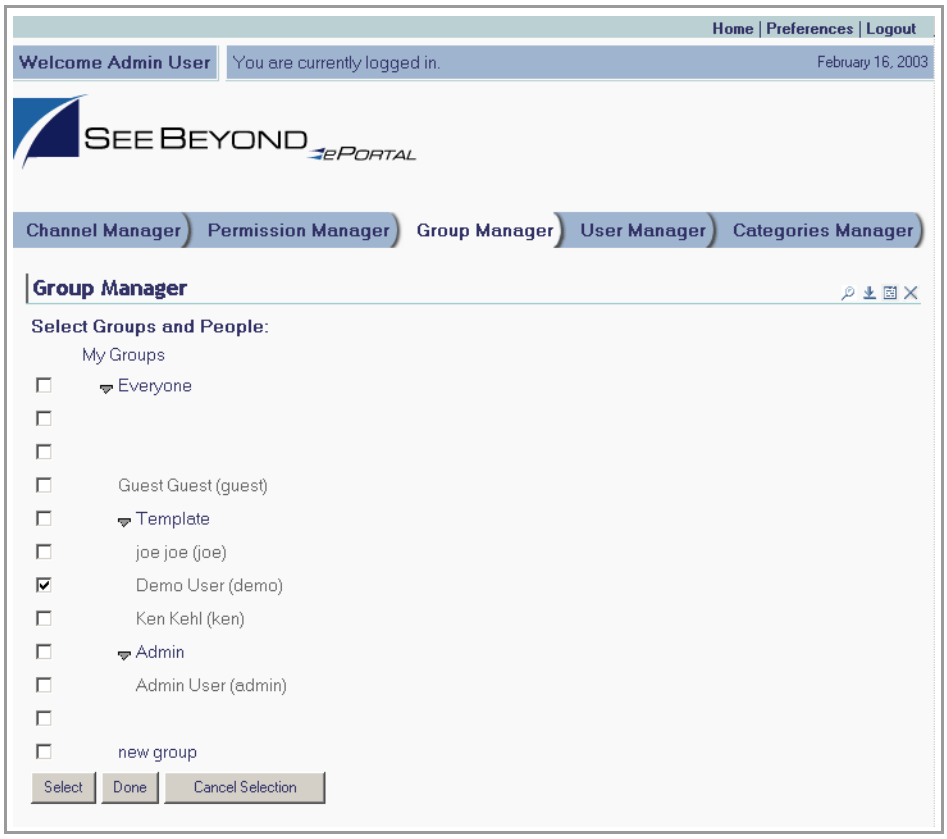
2 To expand the list to view the existing groups, click the expansion arrow ▶ to the left of the **Everyone** label.

3 To access the group you want to modify, click the expansion arrow ▶ to the left of the group's name, for example, **Template**.

4 In the expanded list, select the sub-group name you want to modify.

5 Click **Add Members**.

Figure 12 Adding members to a group



6 Select the check box aligned with the group name to which you want to add a member.

7 Click **Done**.

To Assign Permissions to an Existing Group

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

1 On the **ePortal Composer Home** page, select the **Group Manager** tab. See **Figure 13 on page 36**.

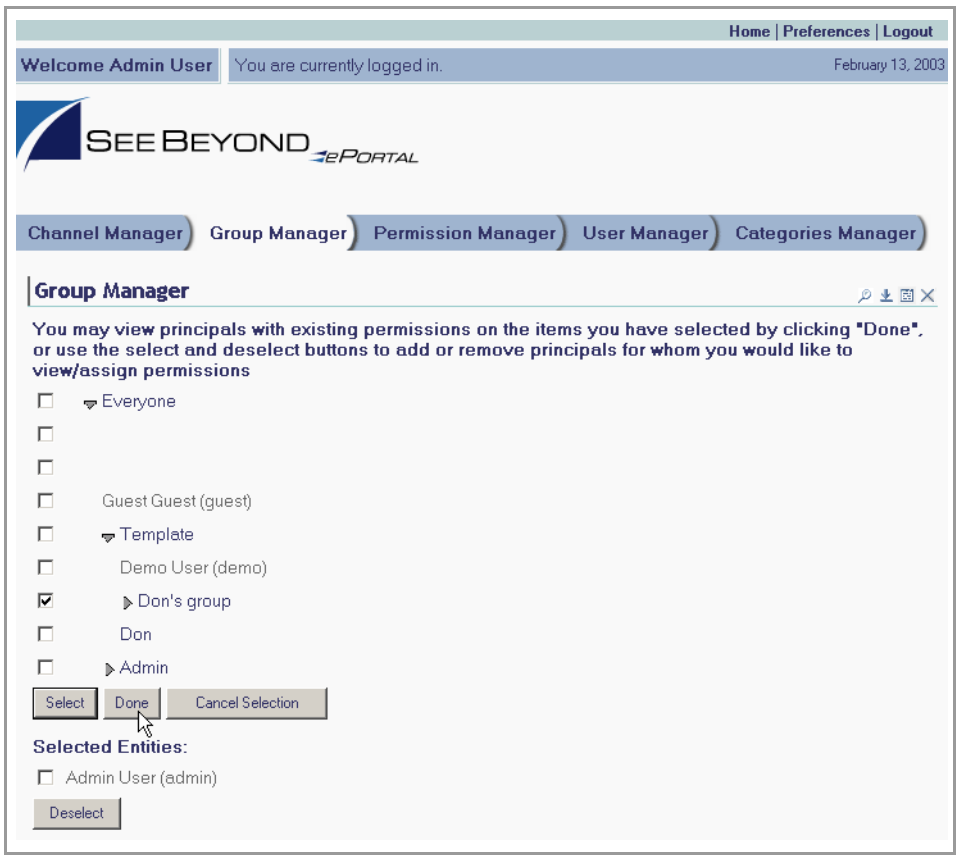
2 To expand the list to view the existing groups, click the expansion arrow ▶ to the left of the **Everyone** label.

3 To view the group you want to modify, click the expansion arrow ▶ to the left of the group's name.

4 In the expanded list, select the group or sub-group you want to modify.

5 Click **Assign Permissions**.

Figure 13 Assigning permissions to a group



6 Select the names to which you want to assign permissions.

7 To add or remove names, click **Select** and **Deselect**.

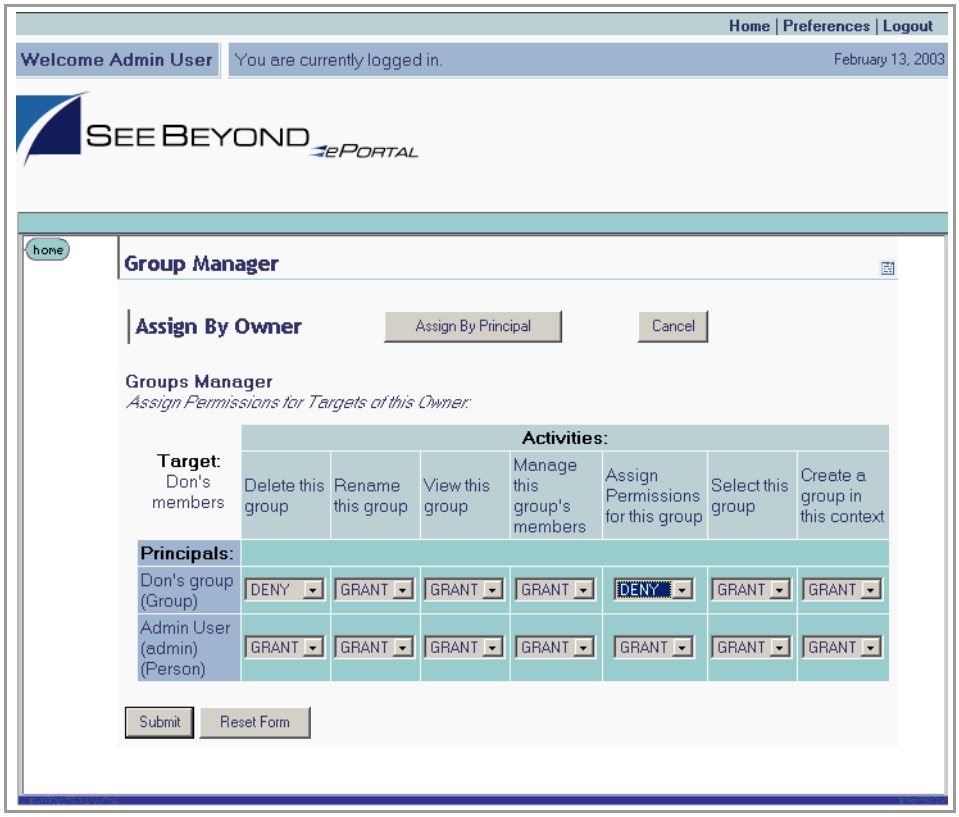
8 When you are finished selecting names, click **Done**.

9 To assign group-level permissions (**Grant** or **Deny**), toggle the values in the labeled drop-down lists. See **Figure 14 on page 37**.

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

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

Figure 14 Assigning group-level permissions



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

Chapter 6

Portal Administration: Managing Channels

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

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

6.0.1 Before you Begin

Only SeeBeyond Enterprise Portal Server administrators are allowed to create, publish, and modify channels. The following procedures assume that you have SeeBeyond Enterprise Portal Server administrator privileges.

6.1 Publishing a New Channel

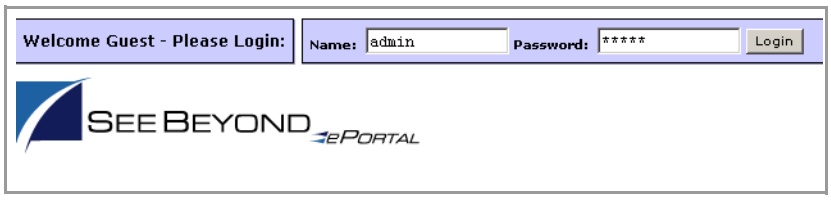
Using ePortal Composer to publish a new channel is described below.

Log into ePortal Composer

1. Start your Browser.
2. Go to **http://localhost:8080/ePortal Composer**.
3. On the **Login** page, type the administrator user name and password, for example:
   - Username = **admin**
   - Password = **admin**

See Figure 15.

Figure 15 Login page



4. Click **Login**.

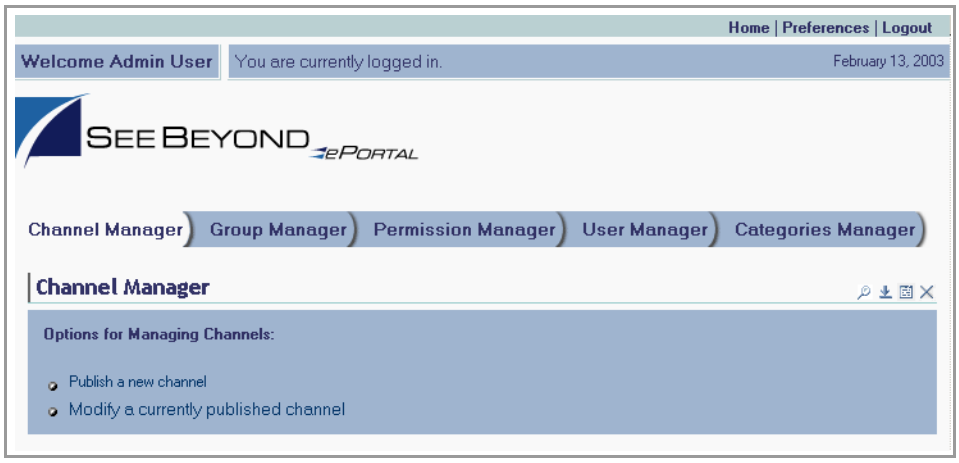
The **ePortal Composer Administration** page opens. The **Channel Manager** tab is the default.

Publish a New Channel

1 Under the **Options for Managing Channels** heading, click **Publish a new channel**.

2 In the **Channel Type** area, select the **Inline Frame** option. See Figure 16.

Figure 16 Publishing a channel



3 Click **Next**. See **Figure 17 on page 40**.

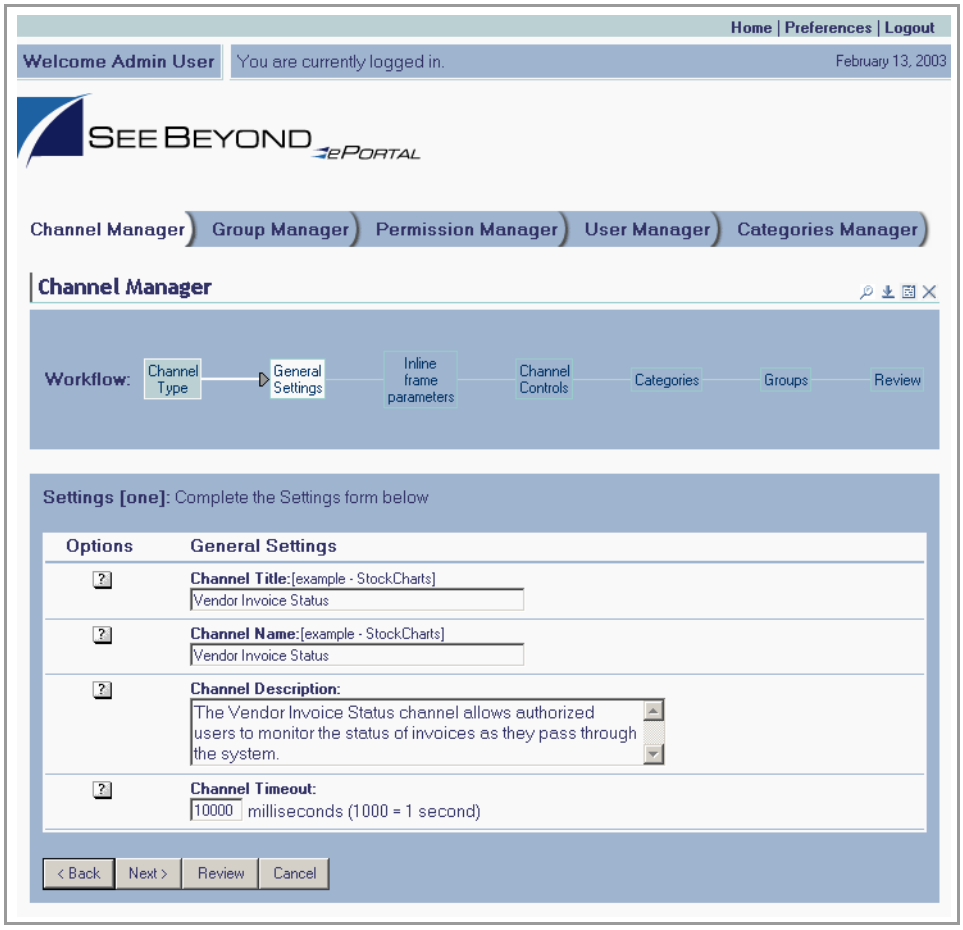
Figure 17 Specifying an inline frame

4 In the **Settings** area, type the following information in the labeled fields.

- **Channel Title**— displayed when a user views the channel.
- **Channel Name**—a logical name, which is displayed in the list of channels when your are personalizing (configuring) a channel's layout and view for a particular user.
- **Channel Description**— a short overview of the channel's purpose.
- **Channel Timeout**—the time-frame, in milliseconds, within which, channel response must be received during a web application query. When the set time elapses without a response, the channel is closed.

See **Figure 18 on page 41**.

Figure 18 Specifying general channel settings



5 Type in the desired information, and then click **Next**.

6 In the **Inline frame parameters** area, under the **General Settings** heading, in the **URL** field, type the URL for the page you want to display in the in-line frame.

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

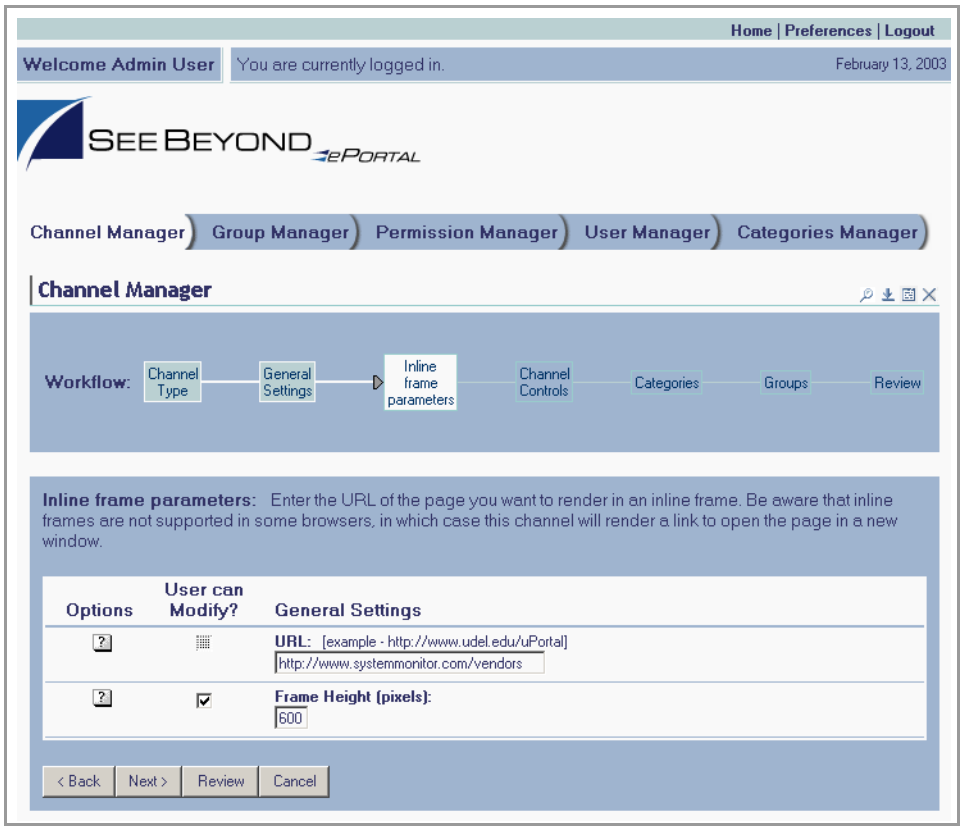
Note: *In-line frames are not supported by some browsers. Lack of in-line frame support will cause the browser to open the page in a new window.*

7 In the **Frame Height** field, in pixels, type in a height value.

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

See **Figure 19 on page 42**.

Figure 19 Setting inline frame parameters



8 Click **Next**.

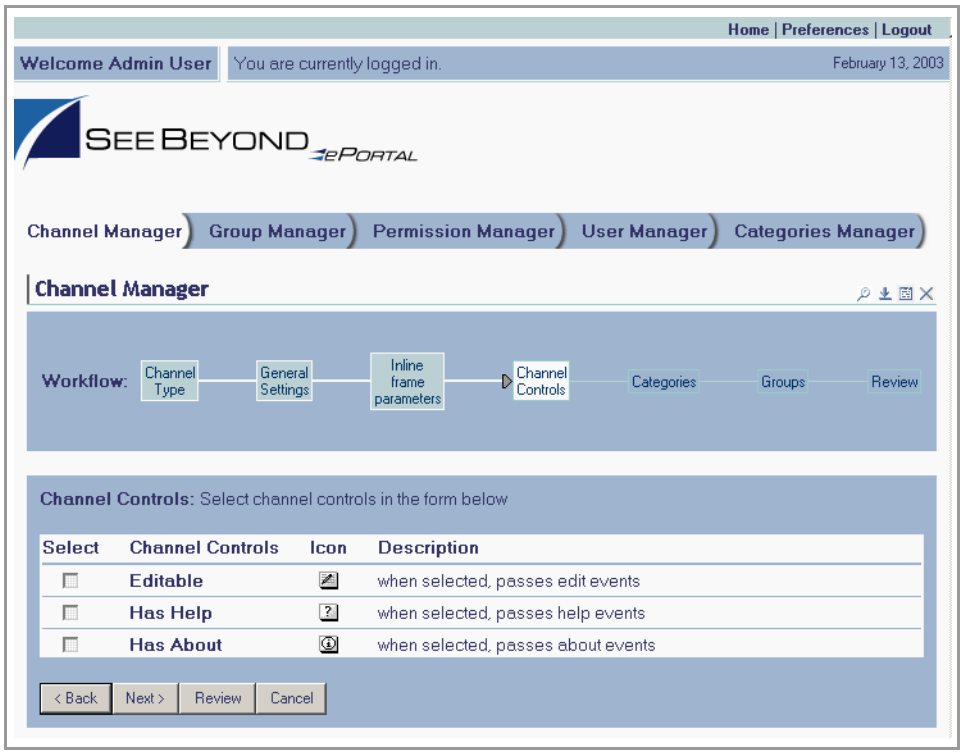
9 In the **Channel Controls** area, under the **Select** heading, select or clear the controls you want to add to the channel.

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

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

See **Figure 20 on page 43**.

Figure 20 Setting channel controls



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

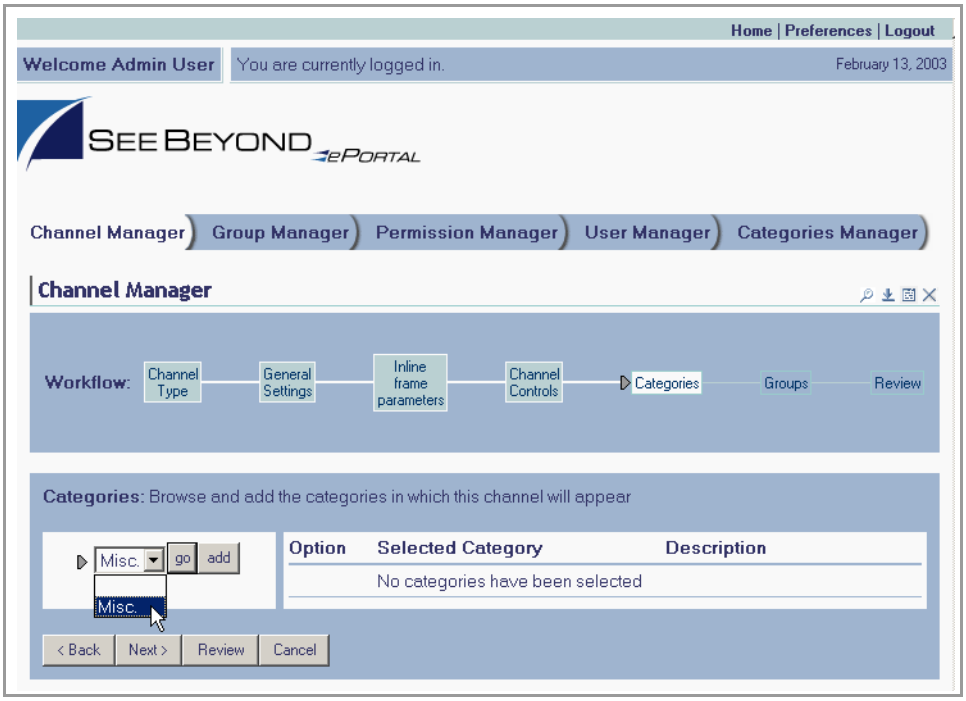
11 In the **Categories** area, to assign the channel to a category, select the drop-down arrow and select an appropriate category from the list.

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

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

The category is displayed to the right of the **X** under the **Selected Category** heading. To remove the channel from the category, under the **Option** heading, click **X**. See **Figure 21 on page 44**.

Figure 21 Assigning a category



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

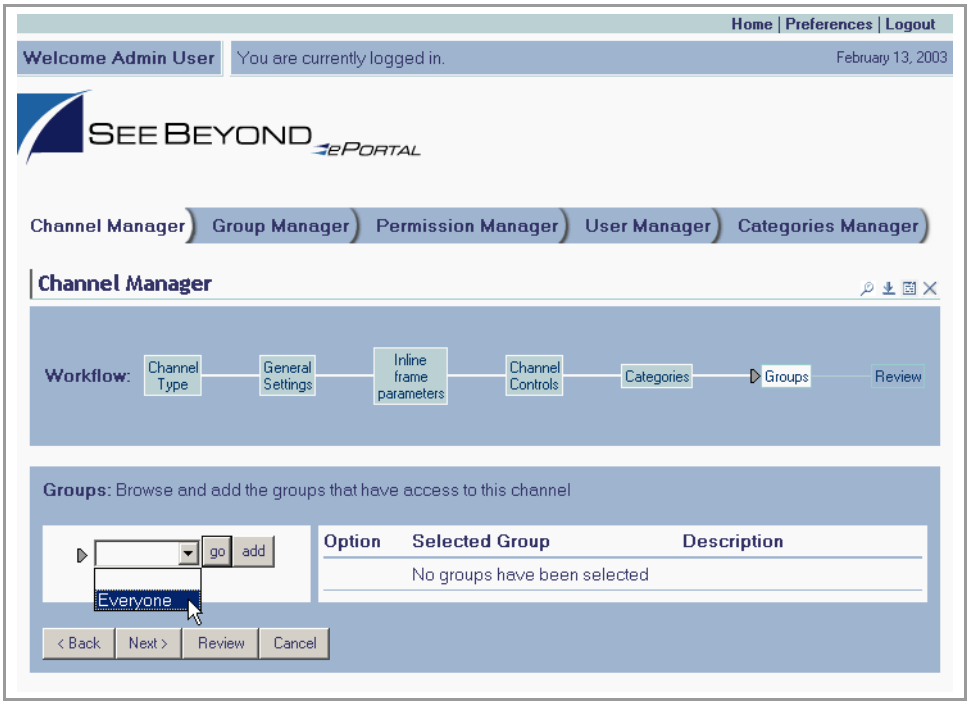
14 In the **Groups** area, to specify the groups that you want to have access to the channel, select the drop-down arrow and select the groups from the list, and then click **Add**.

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

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

See **Figure 22 on page 45**.

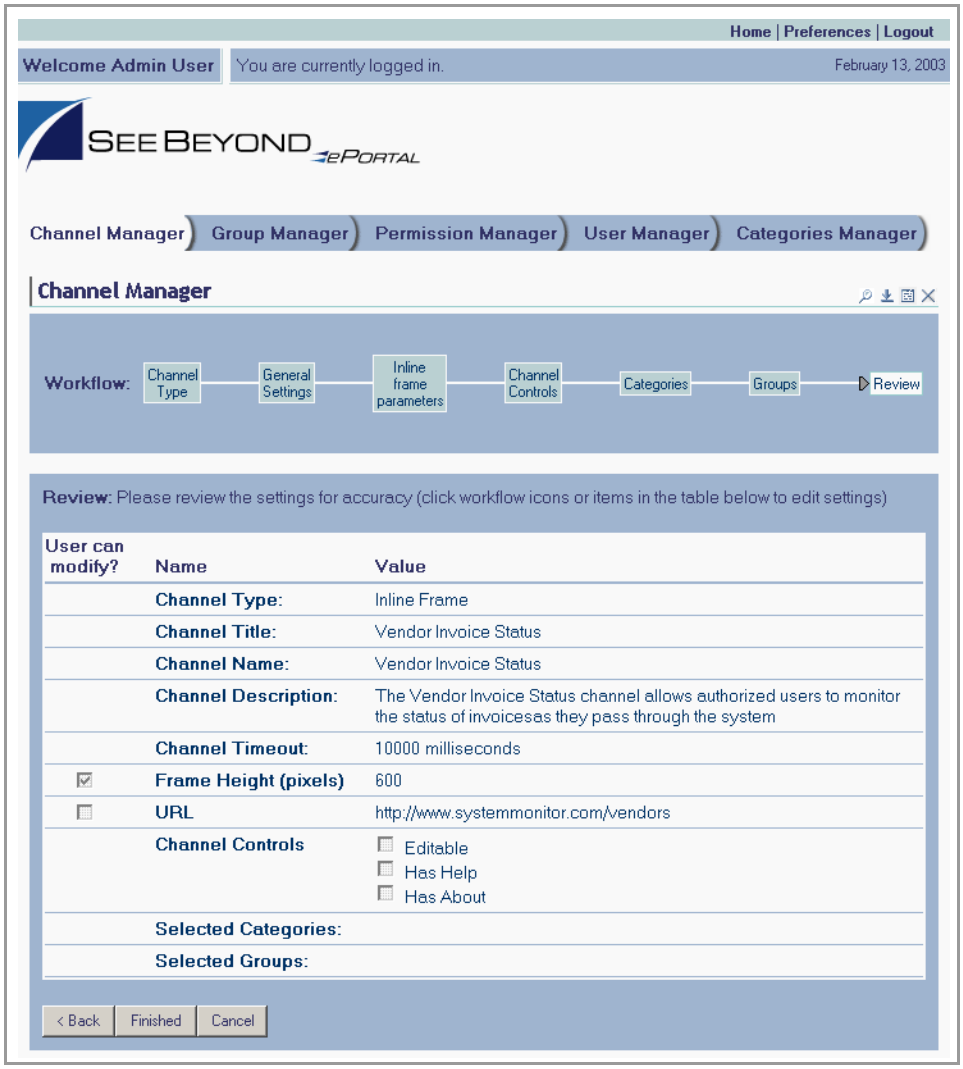
Figure 22 Assigning. a group



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

16 In the **Review** area, audit the information you provided for the channel. See **Figure 23 on page 46**.

Figure 23 Reviewing channel parameters



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

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

Chapter 7

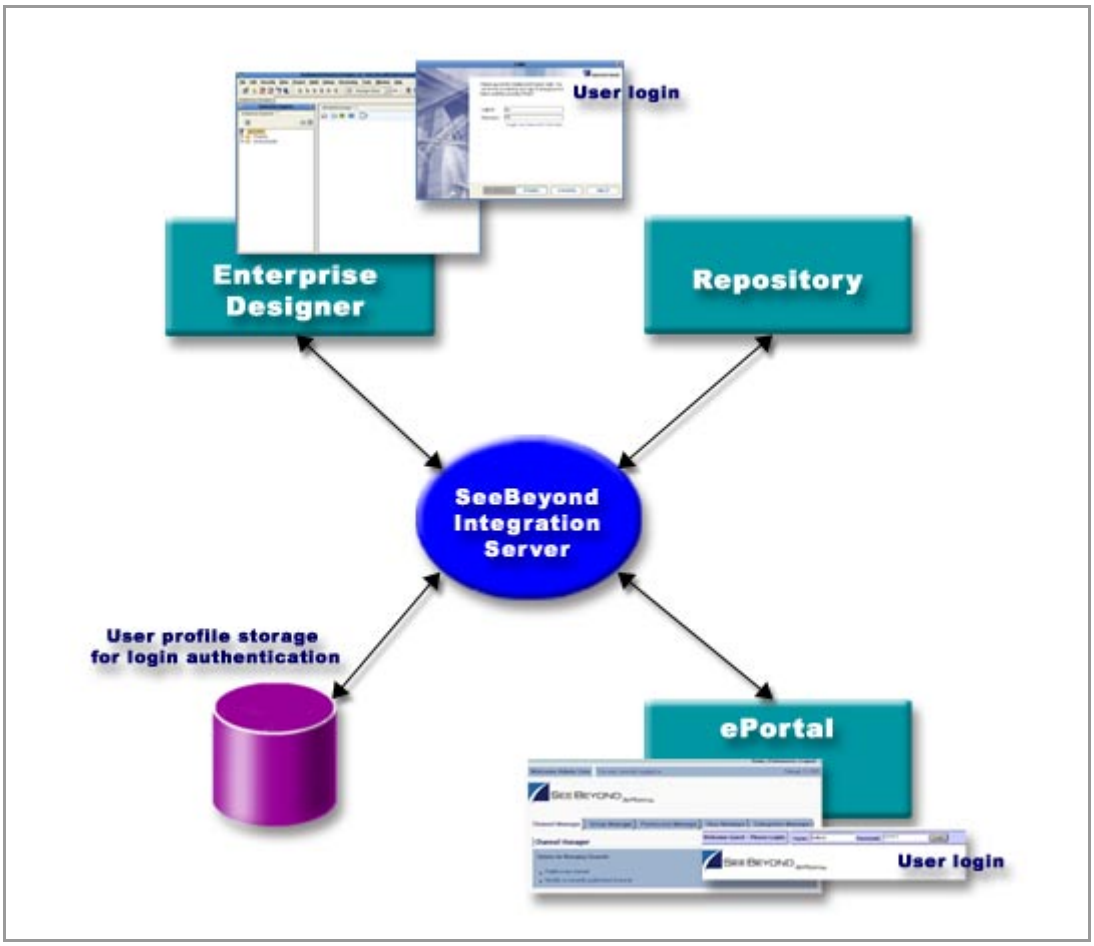
User Login Authentication

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

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

An example of the user login authentication process is illustrated in Figure 24, below.

Figure 24 ePortal Composer Login Authentication



Chapter 8

Portal Administration: Personalization

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

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

8.0.1 Before you Begin

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

8.1 Personalizing a View

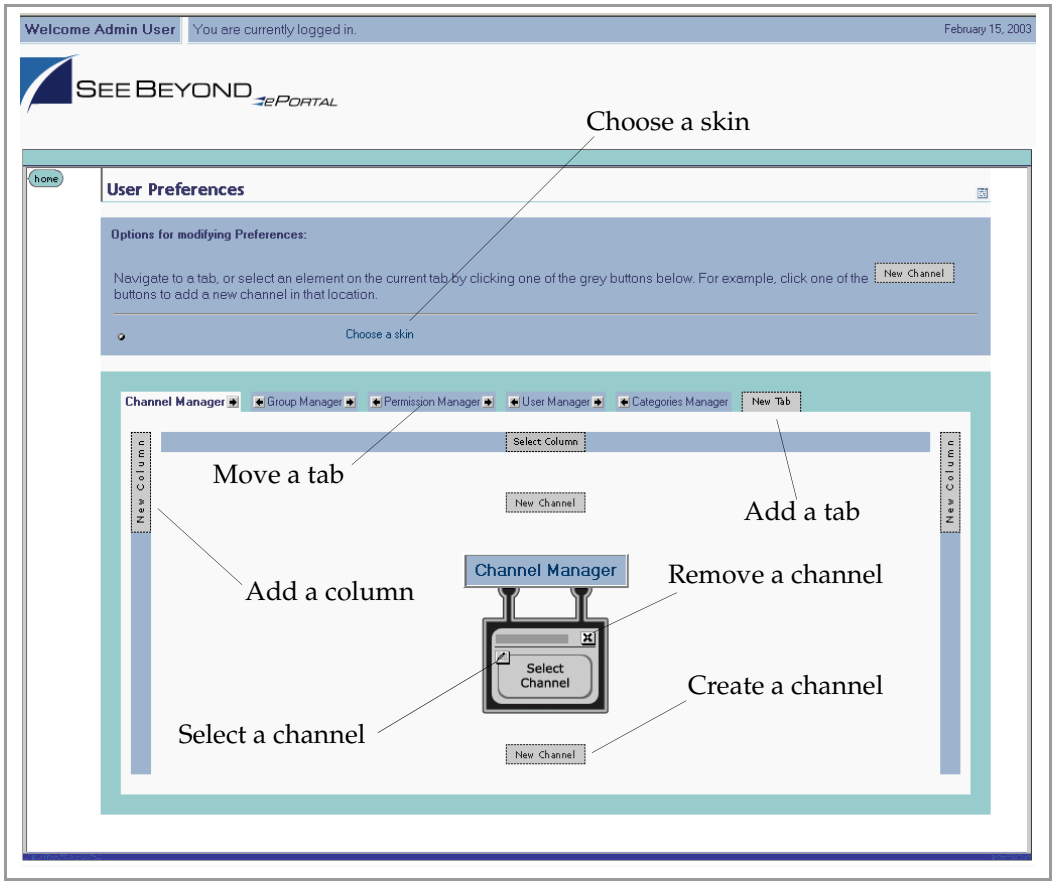
Using ePortal Composer to personalize a portal view is described below.

1. Start your browser.
2. Go to **http://localhost:8080/ePortal Composer**.
3. On the **Login** page, type the administrator user name and password, for example:
   - Username = **admin**
   - Password = **admin**
4. Click **Login**.

   The **ePortal Composer Administration** page will be displayed in your browser. The **Channel Manager** tab is the default.
5. To configure a layout, or add channels to the current view, click the **Preferences** link.

   The **User Preferences** page is displayed. See **Figure 25 on page 49**.

Figure 25 Defining user preferences



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

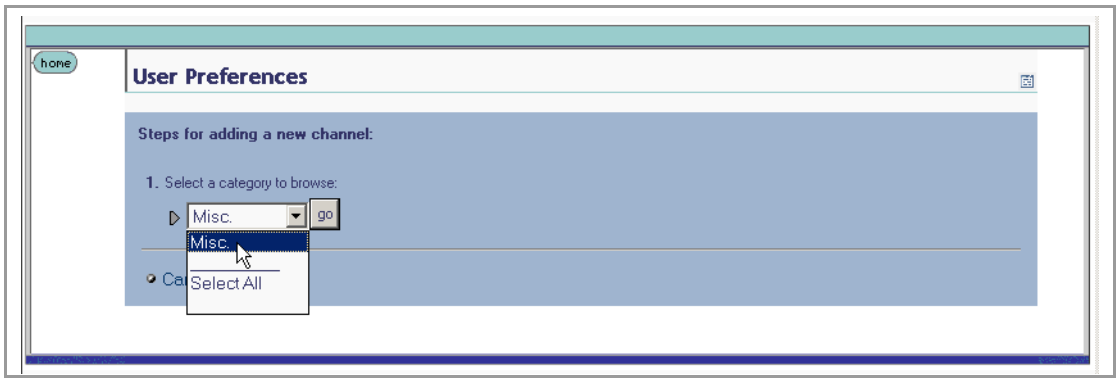
- Move tabs in the view.
- Add tabs to the view.
- Add, move, and resize columns in the view.
- Add channels to the view.
- Remove channels from the view.

8.1.1 Adding a Channel to a View

Add a channel to the view by doing the following:

1 Select the **New Channel** link. See **Figure 26 on page 50**.

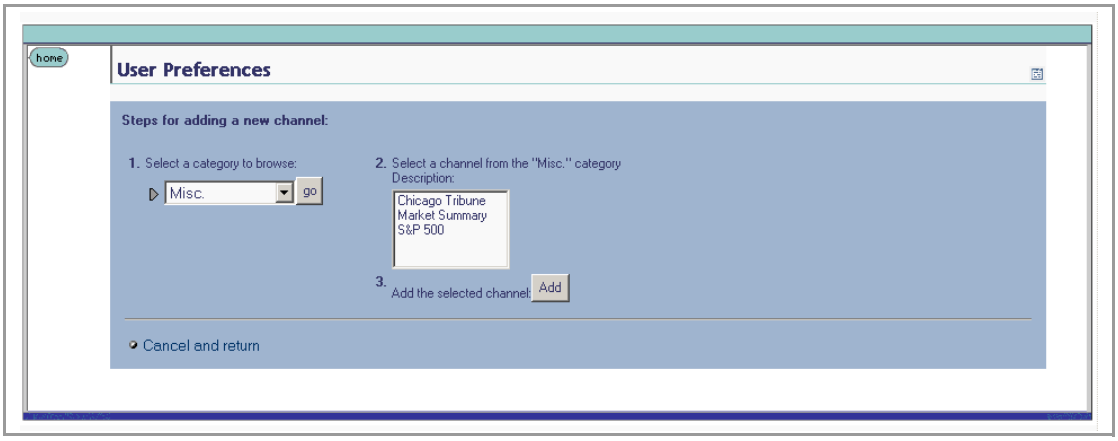
Figure 26 New Channel link



2 From the **Categories** drop-down list, select a category, and then click **Go**.

A list of channel categories will be displayed. See Figure 27.

Figure 27 Channel categories list



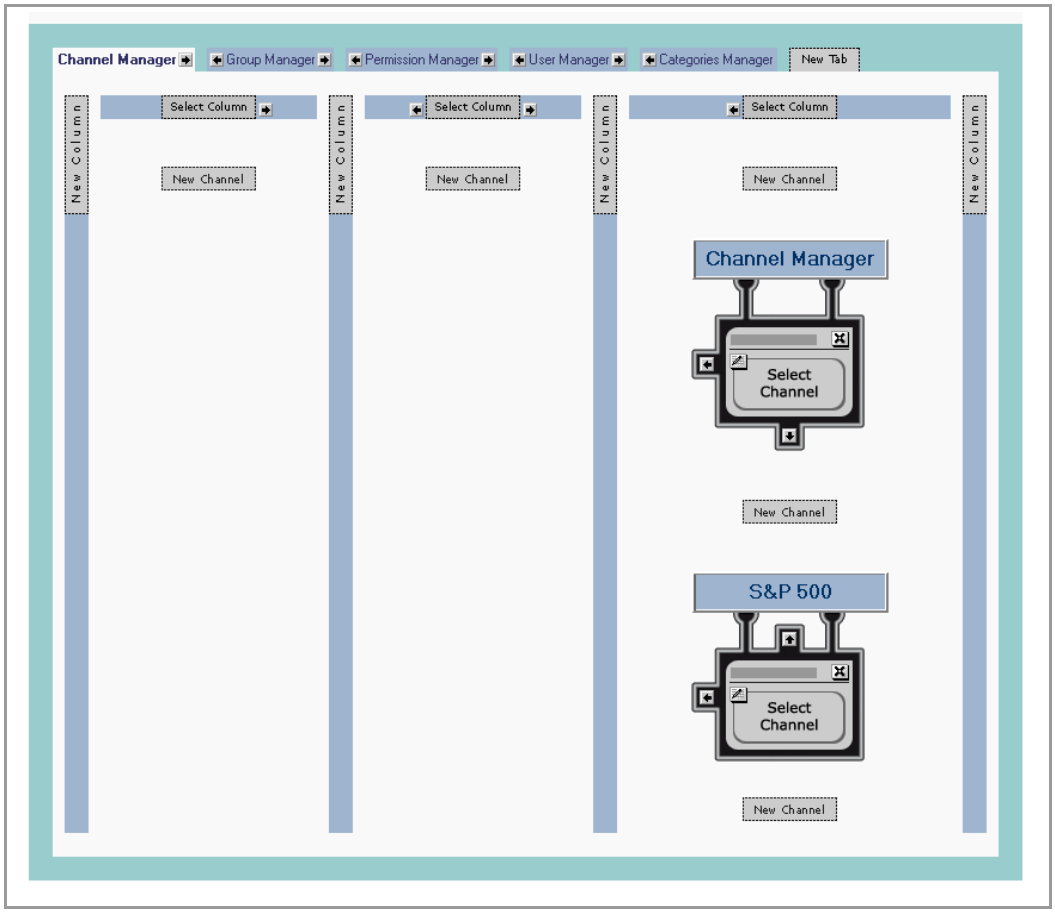
3 Select the channels you want to add, and then click **Add**.

You can add as many channels as you wish. See **Figure 28 on page 51**.

4 To remove a channel, click on the **X** icon on the top right corner of the channel image.

5 To select the current channel for modification, click the **pencil** icon on the left of the channel image.

Figure 28 Adding channels

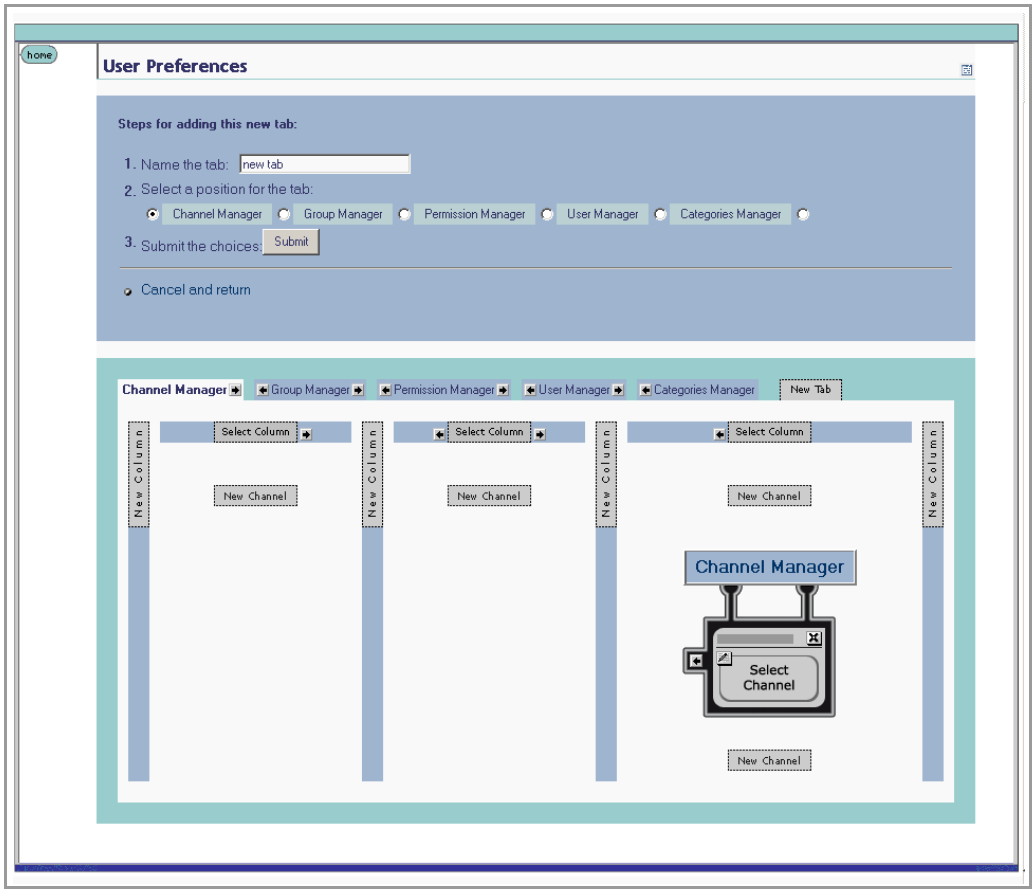


8.1.2 Adding a Tab to a Channel View

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

1 To create a tab, on the **Use Preferences** page, click **New Tab**. See **Figure 29 on page 52**.

Figure 29 Creating a tab



2 Type a name for the tab.

3 Specify the location for the tab relative to the other tabs in the view.

4 Click **Submit**.

5 To cancel the operation at any time, select the **Cancel and return** link.

6 When you return to the **User Preferences** page, you can select the arrows on either side of the tab to move it one to the right or left relative to the other tabs.

8.1.3 Modifying a Tab

1 To modify a tab, on the **Use Preferences** page, select a tab from the row of tabs.

2 Do any of the following:

- Make the tab the default tab.
- Rename the tab.
- Move the tab relative to the other tabs in the view.
- Lock (or unlock) the tab.
- Delete the tab.

3 Click **Submit**.

4 To cancel the operation at any time, select the **Cancel and return** link.

8.1.4 Adding a Column to a Channel View

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

1 To create a column, on the **User Preferences** page, click **New Column**.

2 Specify a width value for the new column.

The total column widths should equal 100% of the page.

3 Click **Submit**.

4 To cancel the operation at any time, select the **Cancel and return** link.

8.1.5 Modifying a Column

You can move and resize existing columns.

1 In the column you want to modify, select the **Select Column** link.

2 Do any of the following:

- Specify a width value for the new column.

  The total column widths should equal 100% of the page.
- Move the column.
- Delete the column.

3 Click **Submit**.

4 To cancel the operation at any time, select the **Cancel and return** link.

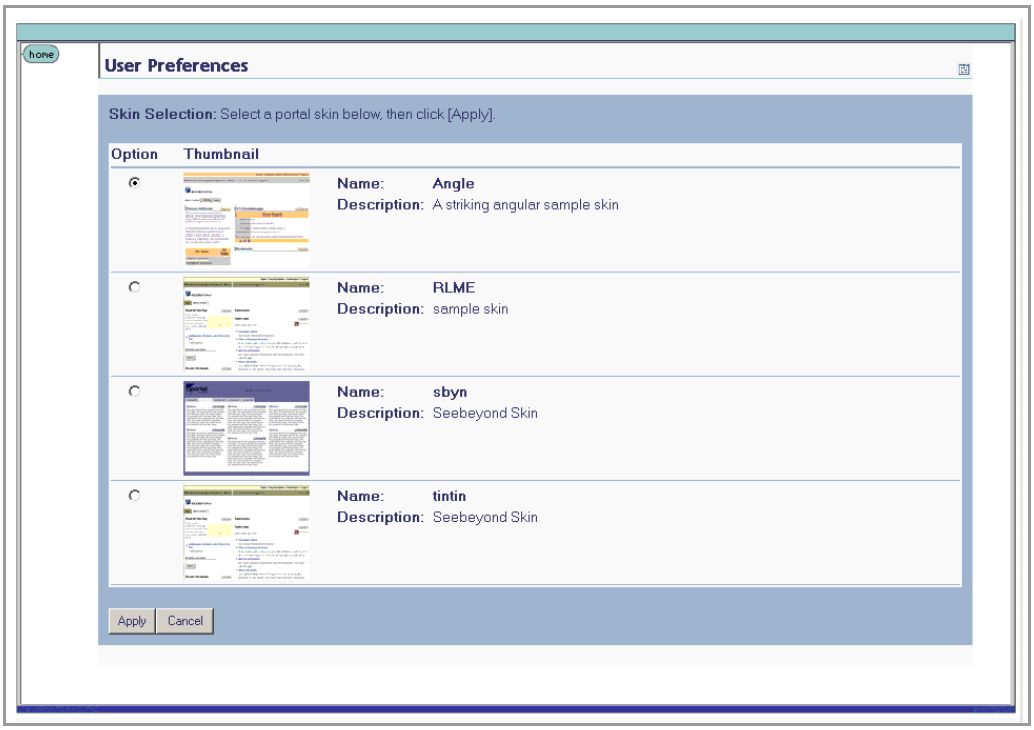
8.1.6 Changing the Skin of a Channel View

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

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

1 On the **User Preferences** page, select the **Choose a skin** link. See **Figure 30 on page 54**.

Figure 30 Choosing a skin



2 To apply the skin, in the **Skin Selection** area, select a skin, and then click **Apply**.

You are now ready to explore ePortal Composer using your own end-user account.

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