SeeBeyond ICAN Suite

ePortal Composer User's Guide

Release 5.0.3

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Chapter 1

Introduction

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

This Chapter Includes

- **"Document Purpose and Scope" on page 10**
- **"Intended Audience" on page 10**
- **"Organization of Information" on page 11**
- **"Writing Conventions" on page 11**
- **"SeeBeyond Web Site" on page 12**

1.1 Document Purpose and Scope

This user's guide explains how to install, set up, and use ePortal to create, manage, and personalize Web channels. The document assumes that you have installed either SeeBeyond's eGate Integrator and its Integration Server/Logical Host or a compatible application server, for example, WebSphere.

1.2 Intended Audience

This guide is intended for experienced computer 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 can be installed, for example, Windows and UNIX, and must be thoroughly familiar with Web browsers and Windows-style operations.

1.3 Organization of Information

This user's 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

1.4 Writing Conventions

The following writing conventions are observed throughout this document.

Table 1 Writing Conventions

Text	Convention	Examples
Button, file, 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, file, and code samples	`Fixed` font. Variables are shown in ***`bold italic`***.	`bootstrap -p` ***`password`***
Hypertext links	**Blue** text	For a description of this document, see **"Document Purpose and Scope" on page 10**.

1.4.1 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 Separator

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.

1.5 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

Chapter 2

About ePortal

This chapter provides an overview of ePortal and its features.

This Chapter Includes

- **"Introduction to ePortal" on page 13**
- **"ePortal Tool Buttons" on page 17**

2.1 Introduction to ePortal

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

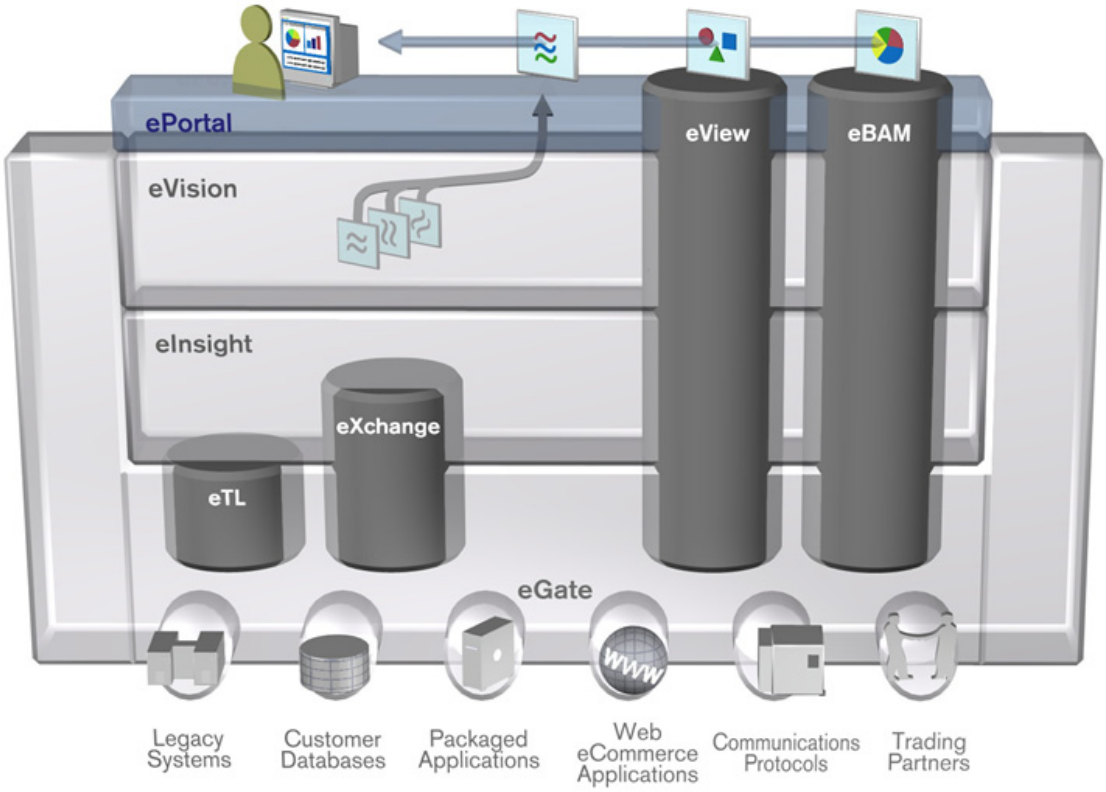
A portal allows the organization to present a single, unified view of enterprise data and applications to employees, customers, and partners. Multiple URLs can be assigned to *channels*, which are aggregated within the portal and then collectively presented to users.

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

ePortal leverages the ICAN Suite by enabling enterprise-wide access to business processes from a single point of entry, a portal. A portal is a Web site that serves as a gateway for Web-based services and applications.

In the ICAN Suite, business processes can be monitored in real-time with Enterprise Manager, and eVision Web applications can be executed, both within their individual channels. How ePortal is integrated within the ICAN Suite shown in **Figure 1 on page 14**.

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 eGate.

2.1.1 About Channels

A channel allows a user to view a Web site via 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 SeeBeyond ICAN Suite run-time assets, or with any other URL or Web application.

With ePortal, users can create personalized channels with targeted views of business information; for example, a channel can allow the user to log into a system, review and complete assigned tasks, and monitor the progress of business activities. Through channels, users can interact with running business processes, while working with only the information that they need to see.

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

2.1.2 Authentication

ePortal can authenticate users via the Enterprise Designer's authentication features or via Lightweight Directory Access Protocol (LDAP). Other applications in the same realm may not require a user to log in again.

The Enterprise Designer enables authentication of user IDs and passwords when users log into ePortal. User attributes such as log-in ID, password (credential), and roles. For more information, see **"Setting Up Authentication" on page 21**.

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

2.1.3 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 via LDAP.

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

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

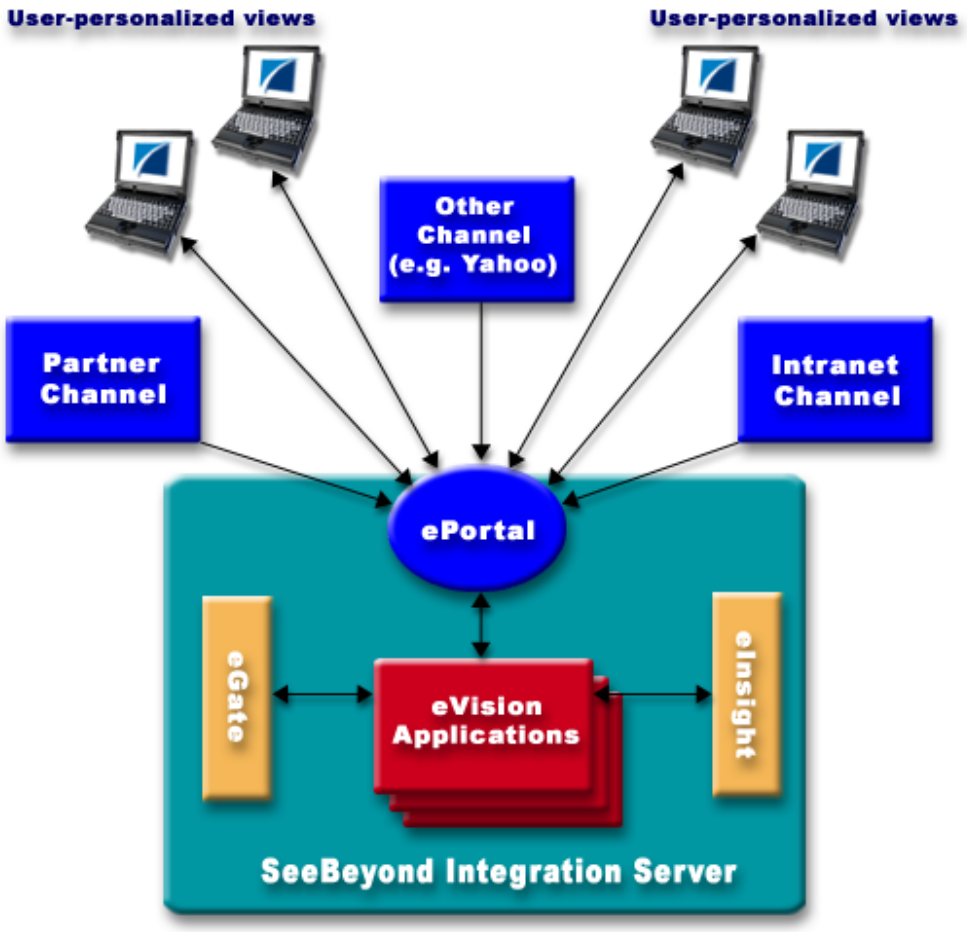
ePortal supports any combination of URLs and simplifies the end-user's access to application resources, Web content, workflow, e-mail, content management systems, and packaged applications such as ERP and CRM.

2.1.4 Personalization

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

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

Figure 2 Personalized Channels



2.2 ePortal Tool Buttons

The ePortal interface contains a set of tool buttons that perform basic user operations. These tool buttons are used in ePortal's **Detail** and **Edit** views and are described in Table 2.

Table 2 Detail and Edit View Tools Buttons

Tool Button	Description
	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.
	Delete Group: Allows you to delete a selected group.
	Close Group: Closes the current group's information panel.
	Remove Member: Allows you to delete members from a selected group.
	Show Information: Displays information about a selected group.
	Focus: Takes you to the ePortal Start page.
	Minimize: Minimizes the current window.
	Detach: Detaches the current window from the frame.

Chapter 3

Installing ePortal

This chapter explains how to install, configure, and deploy ePortal, including its supporting run-time components.

This Chapter Includes

- **"System Requirements" on page 18**
- **"Prerequisites for Installation" on page 18**
- **"Installing ePortal via the Enterprise Manager" on page 19**
- **"Configuring ePortal" on page 20**
- **"Deploying ePortal" on page 34**

3.1 System Requirements

ePortal supports the following operating systems:

- Windows XP, Windows 2000, and Windows Server 2003
- HP Tru64 V5.1A
- HP-UX 11.0 and 11i (RISC)
- IBM AIX 5.1 and 5.2
- Red Hat Linux 8 (Intel)
- Red Hat Linux Advanced Server 2.1 (Intel)
- Sun Solaris 8 and 9

3.2 Prerequisites for Installation

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

3.2.1 Web Server

ePortal must be installed via the Enterprise Manager. You can run ePortal on a system with eGate and its Integration Server or on a WebSphere application server.

Note: *To install ePortal on system running a SeeBeyond Integration Server, your site must have an active installation of eGate.*

3.2.2 Application Components

To install ePortal, you need the following application components:

- An installed license for eGate and ePortal
- **ePortal.ear** (enterprise archive file)
- **search.war** (ePortal search facility Web archive file)
- **ePortal.properties** (configuration file for ePortal run-time properties)

3.3 Installing ePortal via the Enterprise Manager

During the eGate Integrator 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.

3.3.1 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**.

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 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, 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. Using your browser, connect to the Repository.
2. During the procedures for uploading files to the Repository using the Enterprise Manager, select and upload the following file:
   - **ePortal.sar**
3. When the upload is finished, you can exit the browser.

3.3.2 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:

   - **search.war**
   - **ePortal.ear**
   - **ePortal.properties**

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 **"Configuring and Deploying ePortal on WebSphere" on page 36** for instructions on how to install, configure, and deploy ePortal on WebSphere.

3.4 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

If you are using LDAP, you must configure ePortal accordingly. This section explains how to do these operations.

3.4.1 Setting Up the Integration Server

If you are using the 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 Tutorial*.

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.

3.4.2 Setting Up Authentication

The ePortal run-time environment requires that you define the following users:

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

You must define these users in the Enterprise Designer Environment where ePortal is running. The users you have defined provide the initial channel templates at log-in. The **Administrator** user is already defined in the eGate system, but not the roles. In addition, you must create the **guest** and **template** users.

These users must have the following roles:

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

Note: *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.*

Using LDAP and the Integration Server

If you are using the Integration Server and Lightweight Directory Access Protocol (LDAP), you must use LDAP to set up the authentication features, that is, users and roles are set up in LDAP and not via 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 26** for details on how to set the Integration Server properties for LDAP.

Using the WebSphere application server

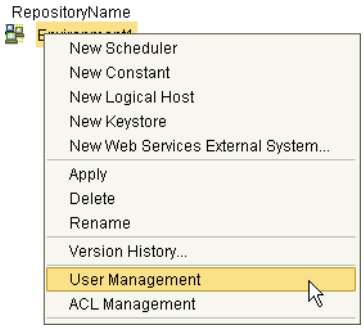
If you are using the WebSphere application server to run ePortal, you must set up your authentication for ePortal using LDAP. See the appropriate LDAP documentation for information on how to set up authentication using LDAP.

See **"Configuring and Deploying ePortal on WebSphere" on page 36** for more information on how to install, configure, and deploy ePortal on WebSphere.

To add the administration role to the Administrator user

1. In the **Environment** tree, click the **Environment** (the Environment name) that you created for ePortal.
2. On the pop-up menu, click **User Management**. See Figure 3.

Figure 3 User Management Context Menu

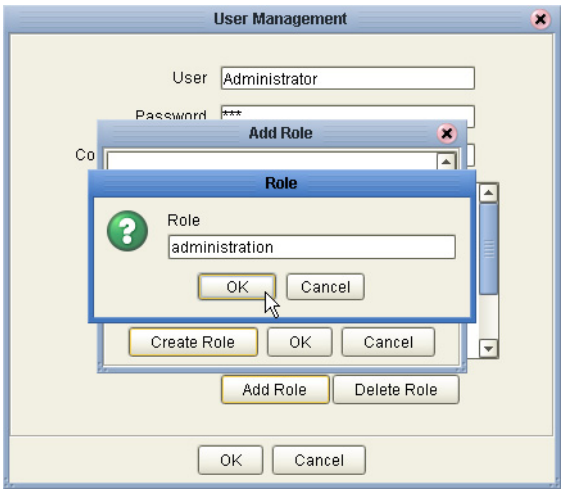


3. On the **User Management** dialog box, click **Administrator,** click **Modify**, then click **Add Role**.
4. To create the **administration** role, on the **Add Role** dialog box, click **Create Role**.

Note: *The Enterprise Designer refers to ePortal* ***groups*** *as* ***roles****.*

5 On the **Role** dialog box, type **administration**, then click **OK**. See Figure 4.

Figure 4 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 **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

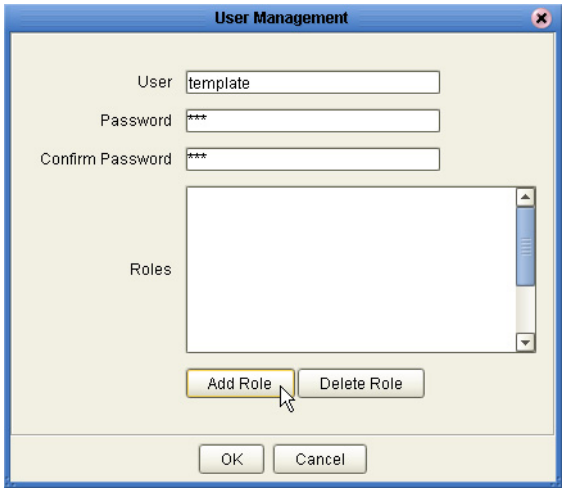
1 On the **User Management** dialog box, click **Add**.

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 5.

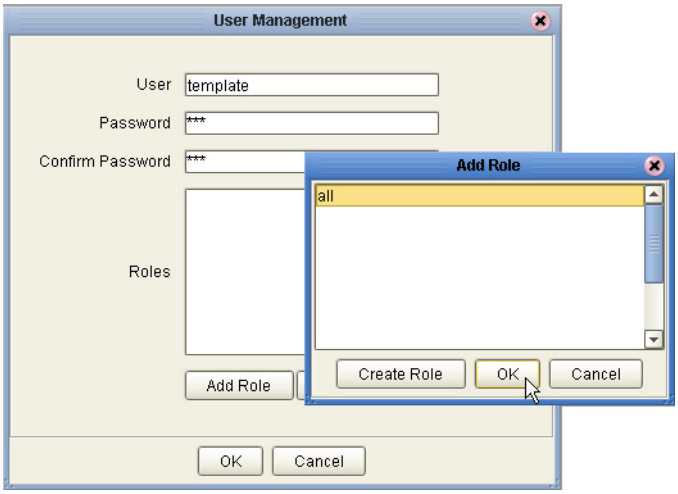
Figure 5 Adding Users in Enterprise Designer



5 On the **Add Role** dialog box, select **all**, and click **OK**.

6 On the **User Managemen**t dialog box, click **OK** to add the role. See Figure 6.

Figure 6 Adding Roles in Enterprise Designer

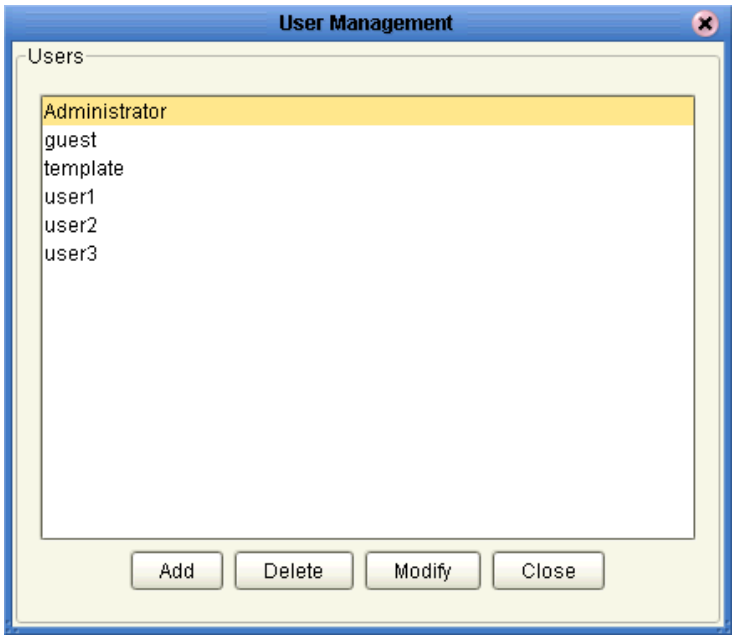


The **template** user is added to the list of users with the role **all**.

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

Figure 7 shows a sample User Management list for ePortal.

Figure 7 User Management List for ePortal



8 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*.

3.4.3 Editing the ePortal Properties File

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

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, edit the **ePortal.properties** file.

3 Locate the following line:

```
integration_server_name=IntegrationSvr1
```

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

5 Locate the following line:

```
internal_db_data_directory=/tmp/ePortal
```

6 Using forward slashes, you can change **/tmp/ePortal** to a directory name that reflects your desired internal database location, for example:

/ePortal/db_data (on Windows, the root is assumed)

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

7 Save the **ePortal properties** file.

Important: *Do **not** edit any of the rest of the lines in the file.*

8 Make sure the Integration Server and Logical Host are running.

Note: *For WebSphere, make sure the application server is running.*

9 Using Windows, copy the **ePortal.properties** file to the Logical Host and drop it into the following directory:

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

Where:

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

To edit ePortal.properties for WebSphere

Follow the previous procedure, but omit step 3.

3.4.4 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

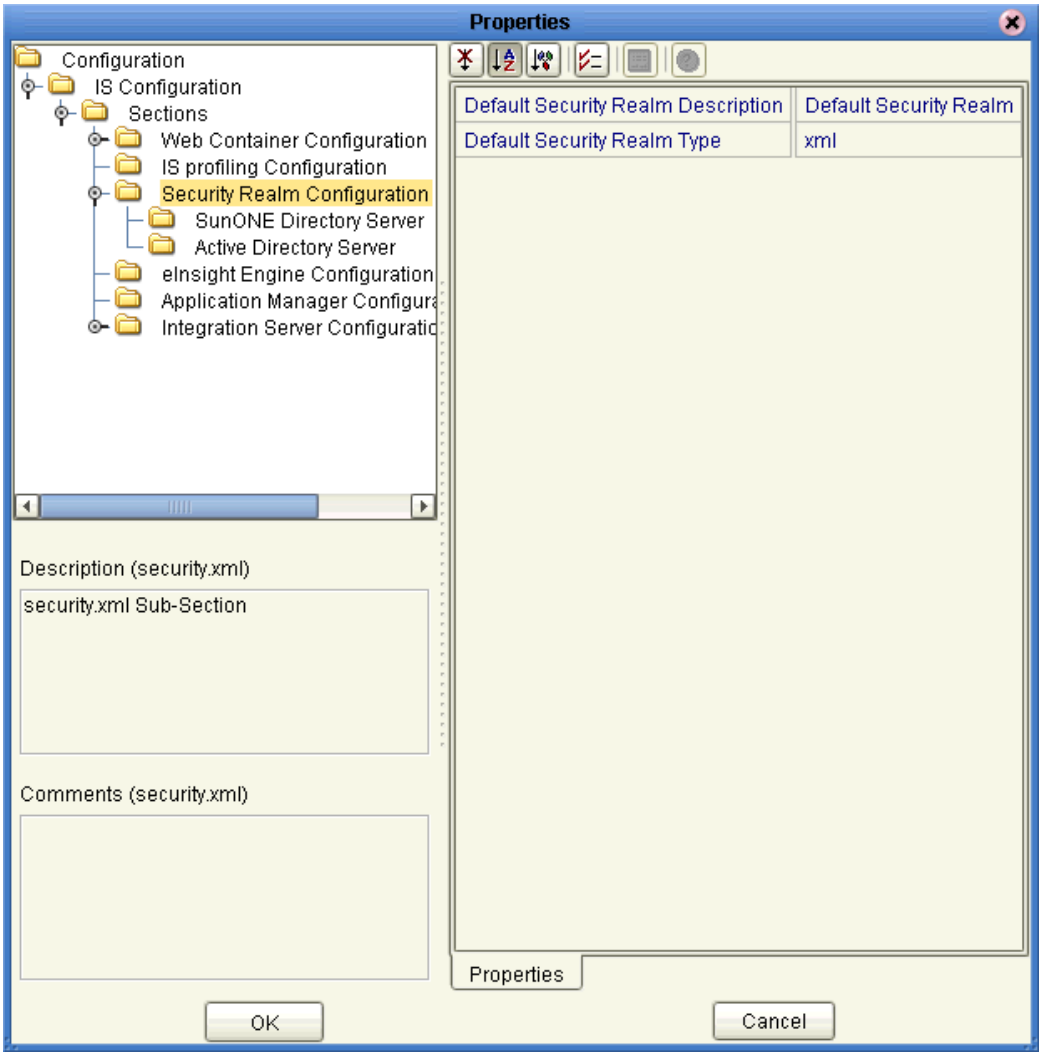
You must set the properties of the Integration Server to be compatible with LDAP. To allow the Enterprise Designer to authenticate via LDAP, you must change the default security realm type to the appropriate realm type. You must also set properties for the desired realm.

To access these properties, click the desired Integration Server on the **Environment Explorer** in the Enterprise Designer. On the properties sheet, expand the following folders:

IS Configuration\Sections\Security Realm Configuration

See **Figure 8 on page 27**.

Figure 8 Security Realm Configuration Properties

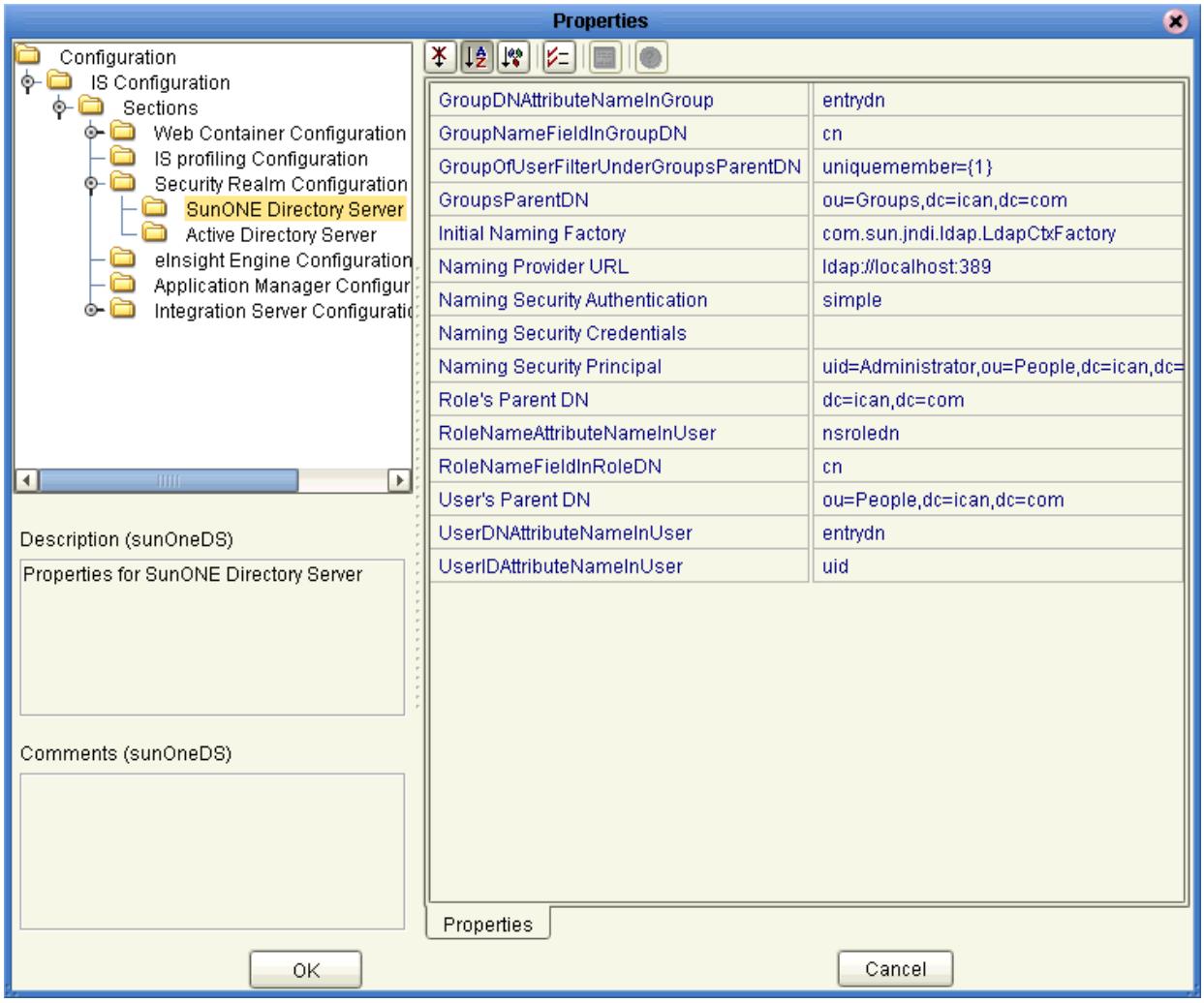


You must set the **Default Security Realm Type** to either **SunOne Directory Server** or **Active Directory Server**, as necessary for your system.

Figure 8 on page 27 shows the **SunOne Directory Server** properties.

Active Directory Server has all the properties you must reset for the **SunOne Directory Server**. Reset them in the same way as you do for the **SunOne Directory Server**. See the list after **Figure 8 on page 27**.

Figure 9 SunOne Directory Server Properties



For complete information on how to reset these properties for **SunOne 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 ePortal and LDAP for the Integration Server

This configuration operation requires you to modify the **ePortal.ear** file and several files it contains.

To prepare for modifying 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**, as follows:

mkdir 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.

del ePortal.jar

9 Delete the **Install\WEB-INF\lib\tmp\META-INF** directory.

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

11 In the **\Install\WEB-INF\lib\temp\properties** directory, replace all the **portal.properties** file content with all the **portal.ldapRealm.properties** file content.

12 In the **\Install\WEB-INF\lib\temp\groups** directory, replace all the **compositeGroupServices.xml** file content with all the **compositeGroupServices.ldapRealm.xml** file content.

If you are doing an Active Directory installation, skip these procedures and instead complete the **procedure on page 31**. Complete the following procedure *only* if you are doing a SunOne Directory installation:

To modify the ldap.properties file for SunOne Directory

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

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

2 Provide the SunOne server IP address and port number, for example:

ldap.host=192.168.1.2

ldap.port=389

3 Provide the SunOne server directory context to search for users, for example:

ldap.baseDN=ou=People,dc=ican,dc=com

4 Provide the SunOne server attribute used to search for a user, for example:

ldap.uidAttribute=uid

5 If your directory server permits anonymous binds, leave the following SunOne server lines unchanged:

#ldap.managerDN=uid=Administrator,ou=People,dc=ican,dc=com

ldap.managerDN=

ldap.managerPW=

6 If your directory server does *not* permit anonymous binds, uncomment the first SunOne server line and provide your values, for example:

ldap.managerDN=uid=Administrator,ou=People,dc=ican,dc=com

ldap.managerDN=

ldap.managerPW=

7 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 SunOne Directory-related fields.

8 Provide the SunOne 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>

9 Provide the SunOne server **uidquery** value, for example:

<uidquery>(uid={0})</uidquery>

10 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>
```

11 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 SunOne Directory-related fields.

12 Provide the SunOne 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>

13 Provide the SunOne server **keyfield** and **namefield** values.

14 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>
```

15 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 modify the ldap.properties file for Active Directory

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

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

2 Provide the Active Directory server IP address and port number, for example:

ldap.host=192.168.1.2

ldap.port=389

3 Uncomment and provide the Active Directory server directory context to search for users, for example:

ldap.baseDN=CN=Users,DC=ican,DC=com

4 Comment the SunOne server directory context to search for users, for example:

#ldap.baseDN=ou=People,dc=ican,dc=com

5 Uncomment and provide the Active Directory server attribute used to search for a user, for example:

ldap.uidAttribute=sAMAccountName

6 Comment the SunOne server attribute used to search for a user, for example:

#ldap.uidAttribute=uid

7 If your directory server permits anonymous binds, leave the following Active Directory server lines commented:

#ldap.managerDN=Administrator@ican.com

#ldap.managerPW=secret

8 Comment the following SunOne server lines:

#ldap.managerDN=uid=Administrator,ou=People,dc=ican,dc=com

#ldap.managerDN=

#ldap.managerPW=

9 If your directory server does not permit anonymous binds, uncomment the first Active Directory server line and provide your values, for example:

ldap.managerDN=Administrator@ican.com

ldap.managerPW=secret

10 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.

11 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>
```

12 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>

13 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>
```

14 Comment all lines in the SunOne 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>
-->
```

15 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.

16 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>
```

17 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>

18 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>
```

19 Under the **Config** section, comment all the SunOne section.

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

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

21 Under the **Group** section, comment the SunOne filter string field, as follows:

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

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**, as follows:

move ePortal.jar.

4 Navigate to the **\Install\WEB-INF\lib** directory.

5 Delete the temporary (**temp**) directory, as follows:

del temp

6 Navigate to the **\Install** directory.

7 If **ePortal.war** already exists, delete it, as follows:

del ePortal.war

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 **\Portal**.

11 Delete the **\Install** directory.

12 Create a new **ePortal.ear** file using the following command:

jar cf ePortal.ear

13 Deploy the **ePortal.ear** file to the Integration Server. See **"Deploying ePortal" on page 34** for details.

3.5 Deploying ePortal

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 Tutorial* 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 **"Configuring and Deploying ePortal on WebSphere" on page 36** for details.

3.5.1 Deploying ePortal Files

To deploy the ePortal application files do the following:

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.

3.5.2 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 and **\WAR**

Where:

- ***drive*** and ***install_directory*** are the installation drive and directory for the ICAN Suite
- ***integration_server*** is the name of your 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://<*localhost*>:<*port*>/ePortal/

Where:

- ***localhost*** 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 installation port number.

In a successful installation, the ePortal **login** window appears.

4 On the **login** window, log in as **Administrator** as follows:

- username: **Administrator**
- password: **STC**

If you want to change the ePortal port number, you can do so using the Integration Server properties sheet 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 sheet.

See **"Setting Integration Server Properties for LDAP" on page 26** for more information on this properties sheet.

3.5.3 Running ePortal

To run ePortal in subsequent sessions

1 Start the Logical Host.

2 Log into ePortal. See **"Validating the Installation" on page 35**.

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

3.6 Configuring and Deploying ePortal on WebSphere

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

3.6.1 Configuring the ePortal.war File

This section explains how to edit the **ePortal.war** file to make it compatible with WebSphere.

To configure the ePortal.war file for WebSphere

1. Complete the **procedure on page 28**.
2. Edit 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.propertes** file to the **\Install\WEB-INF\lib\temp** directory.
5. Navigate to **\Install\WEB-INF\lib\temp**.
6. Create the **ePortal.jar** jar file, as follows:

   jar cf ePortal.jar
7. Move the **ePortal.jar** file to the **\Install\WEB-INF\lib**, as follows:

   move ePortal.jar
8. Navigate to the **\Install\WEB-INF\lib** directory.
9. Delete the temporary (**temp**) directory, as follows:

   del temp
10. Navigate to the **\Install** directory.
11. If **ePortal.war** exists, delete it, as follows:

    del ePortal.war
12. Create a new **ePortal.war** file, as follows:

    jar cf ePortal.war
13. Move the **ePortal.war** file to the **\Portal** directory.
14. Navigate to **\Portal**.
15. Delete the **\Install** directory.
16. Create a new **ePortal.ear** file using the following command:

    jar cf ePortal.ear
17. Deploy the **ePortal.ear** file to the WebSphere application server.

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

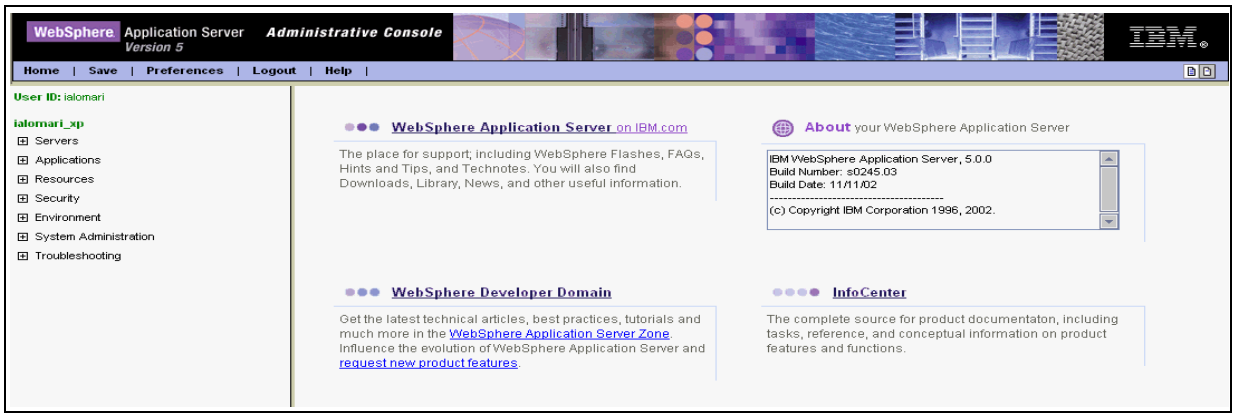
3.6.2 Configuring and Deploying ePortal on WebSphere

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

To configure ePortal security on WebSphere

1. Make sure that the WebSphere server is running.
2. Start the WebSphere Administrative Console. See Figure 10.

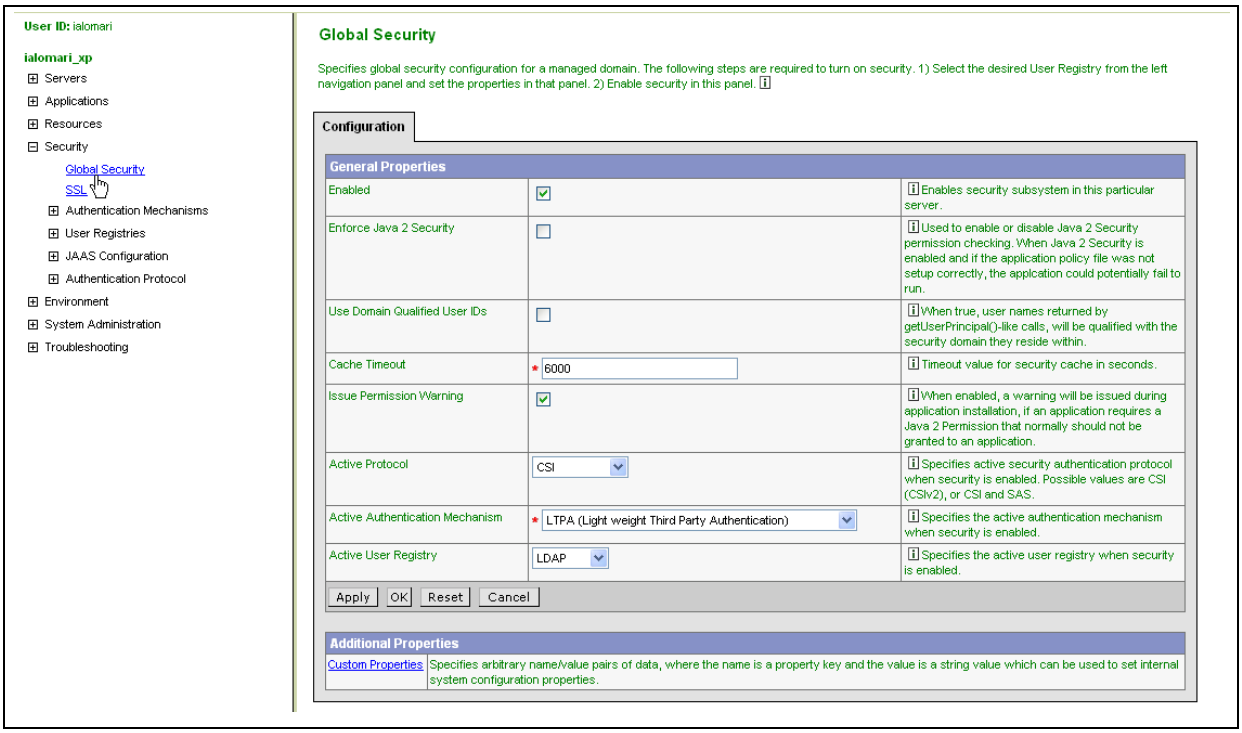
Figure 10 Administrative Console Window



3. Click the **Security** link in the left pane to expand the link.

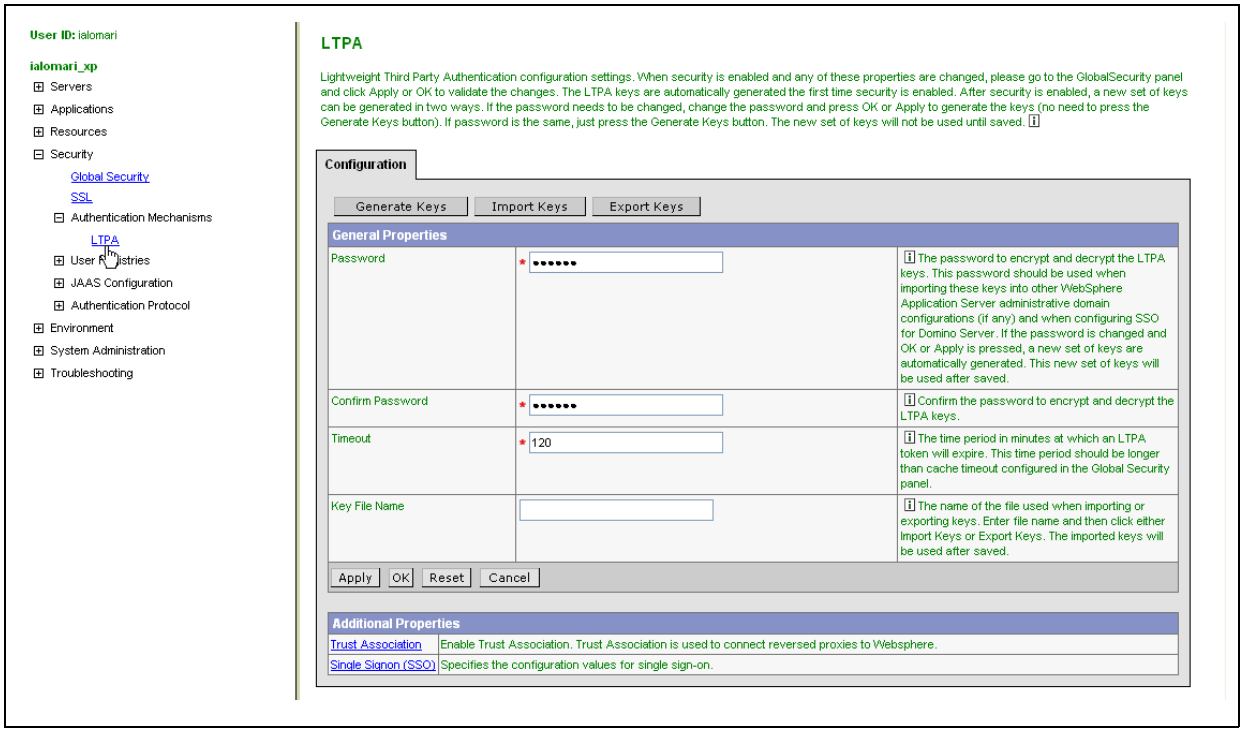
4 Click the **Global Security** link and configure the parameters in the window as shown in Figure 11.

Figure 11 Global Security Window



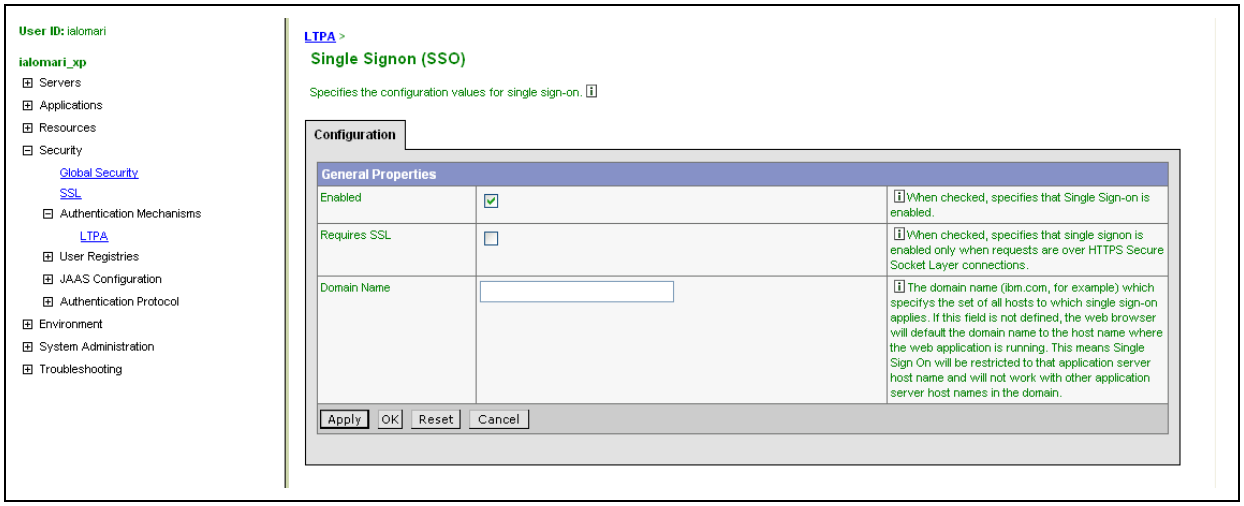
5 Click the **LTPA** link and configure the parameters in the window as shown in Figure 12. Click **Apply** or **OK** to validate the changes.

Figure 12 LTPA Window



6 Select the **LTPA Single Signon (SSO)** option and configure the parameters in the window as shown in Figure 13.

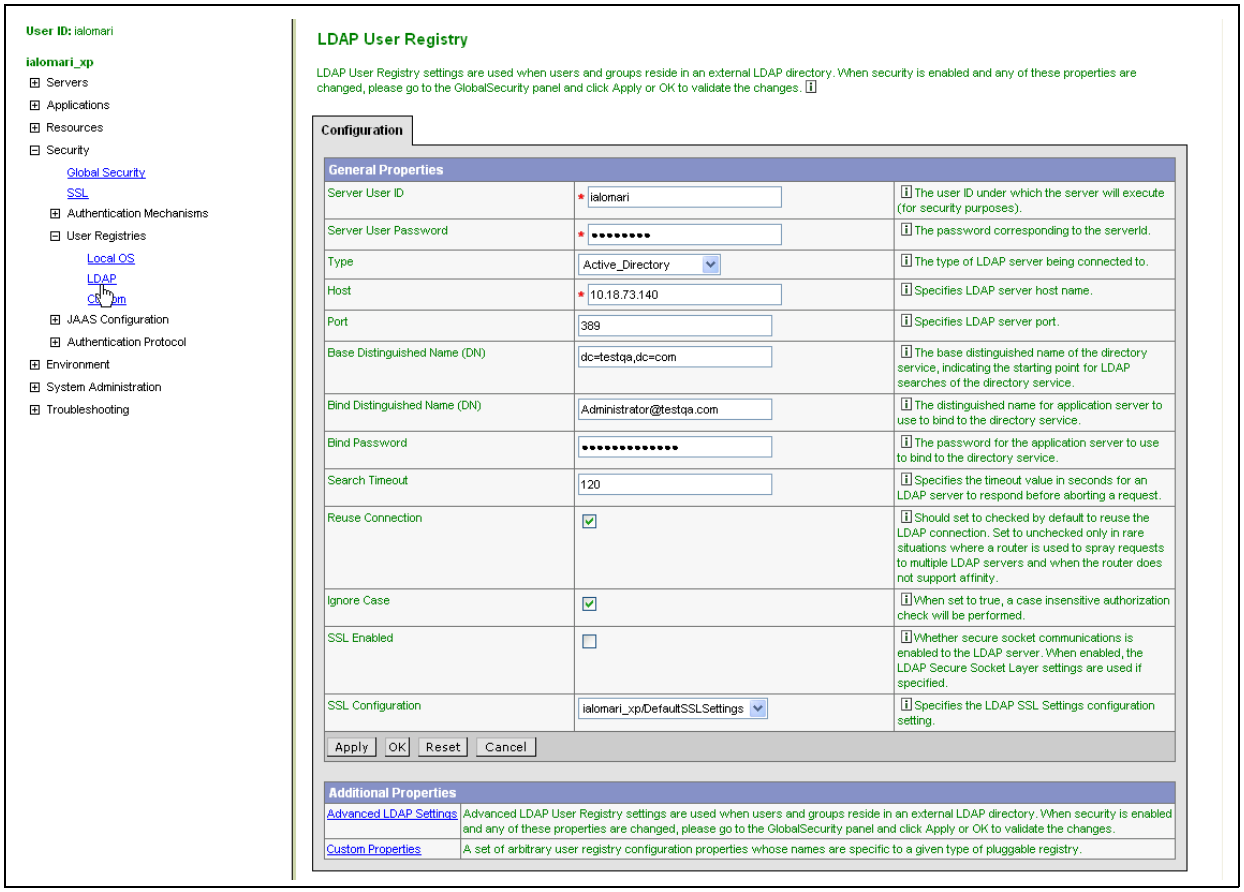
Figure 13 LTPA Single Signon (SSO) Window



7 Click the **LDAP** link and configure the parameters as follows:

- For **Active Directory** use the window shown in Figure 14.

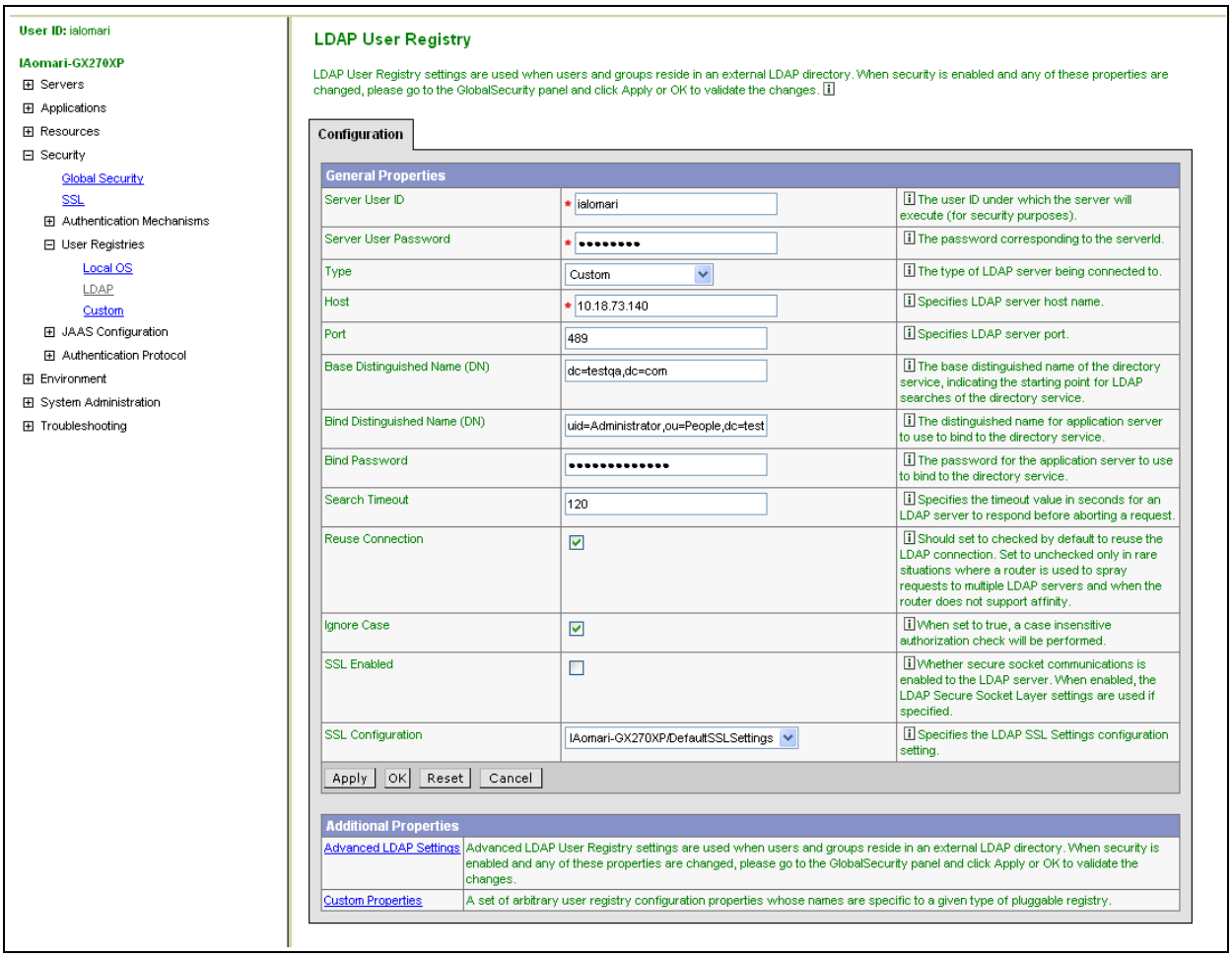
Figure 14 LDAP User Registry Window for Active Directory



Make sure the **Type** parameter is set to **Active_Directory**.

- For **SunOne**, configure the parameters as shown in Figure 15.

Figure 15 LDAP User Registry Window for SunOne

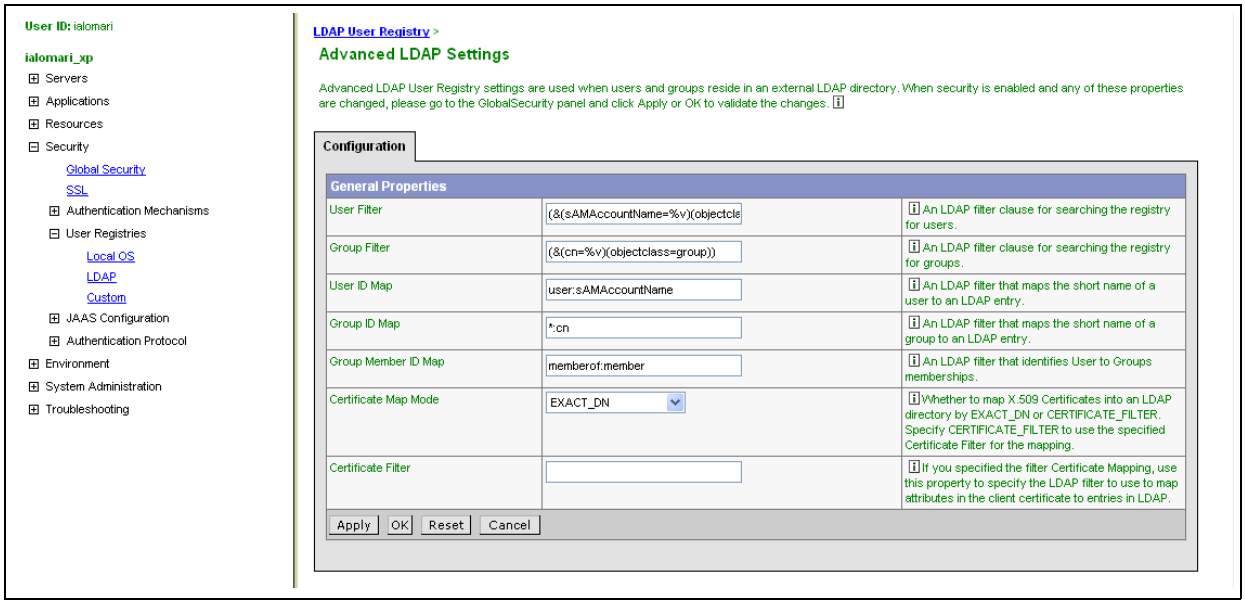


Make sure the **Type** parameter is set to **Custom**.

8 Click **Apply** or **OK** to validate the changes.

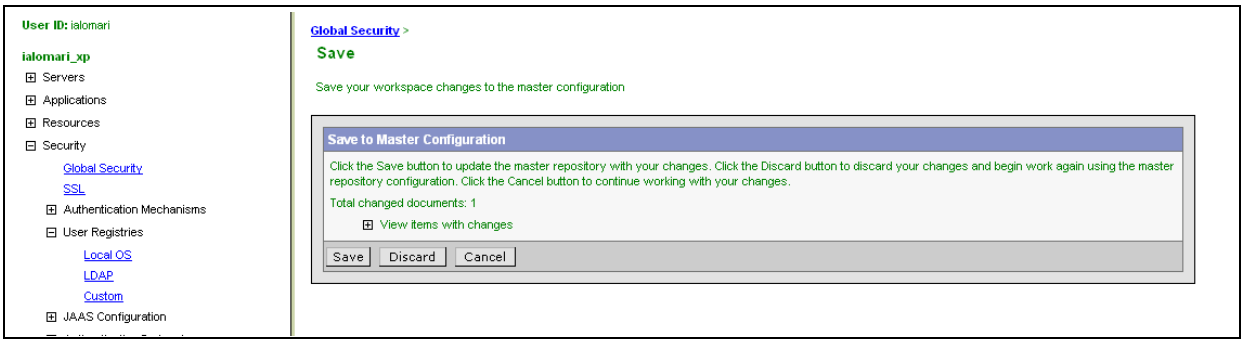
9 Configure the Advanced LDAP Settings as shown in Figure 16. Click **Apply** or **OK** to validate the changes.

Figure 16 LDAP User Registry Window for Advanced LDAP Settings



10 Click the **Global Security** link again, then click **Save** to save your configuration. See Figure 17.

Figure 17 Global Security Window (Save)



You have now finished setting up security for WebSphere.

To deploy ePortal on WebSphere

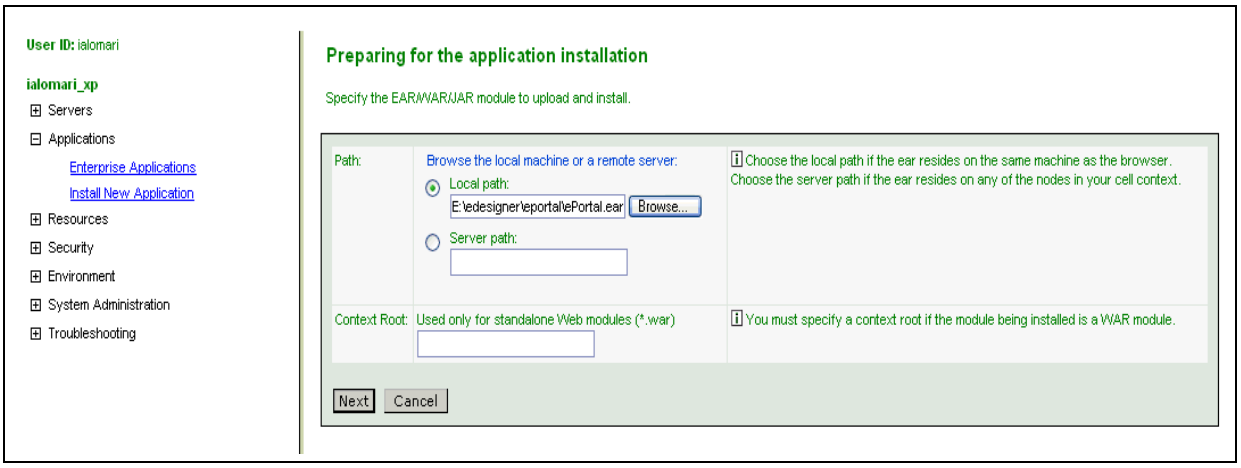
1 Make sure that the WebSphere server is running.

2 Start the WebSphere Administrative Console.

3 In left pane of the Administrative Console home page, click the **Install New Application** link.

The Preparing for the application installation window appears. See Figure 18.

Figure 18 Preparing for the Application Installation Window

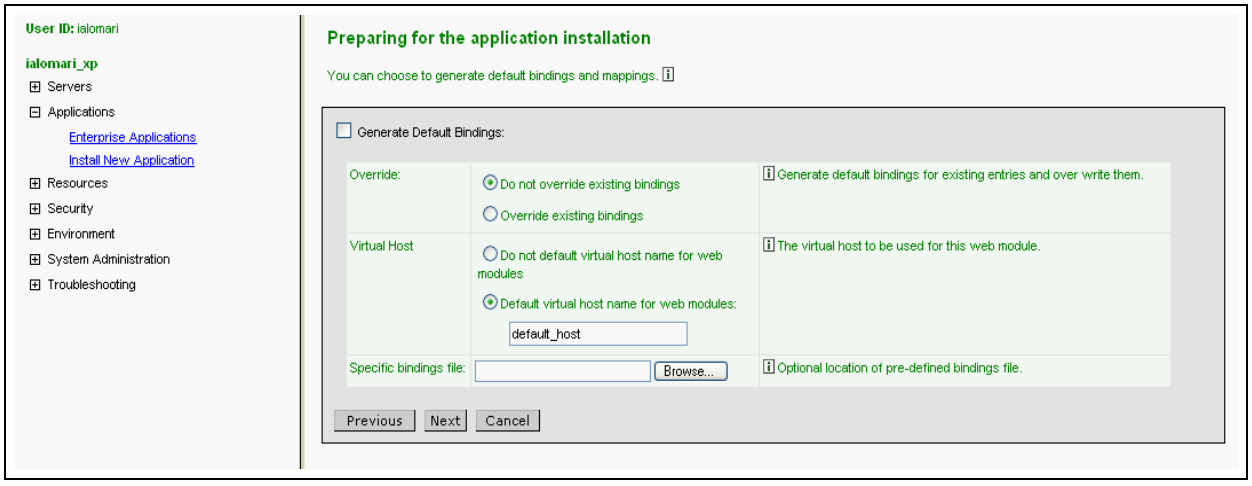


4 Under **Path**, select **Local Path** and browse to the location of the **ePortal.war** file, then click **Open**.

5 Under **Context Root**, type **/ePortal** and click **Next**, to go to the next page.

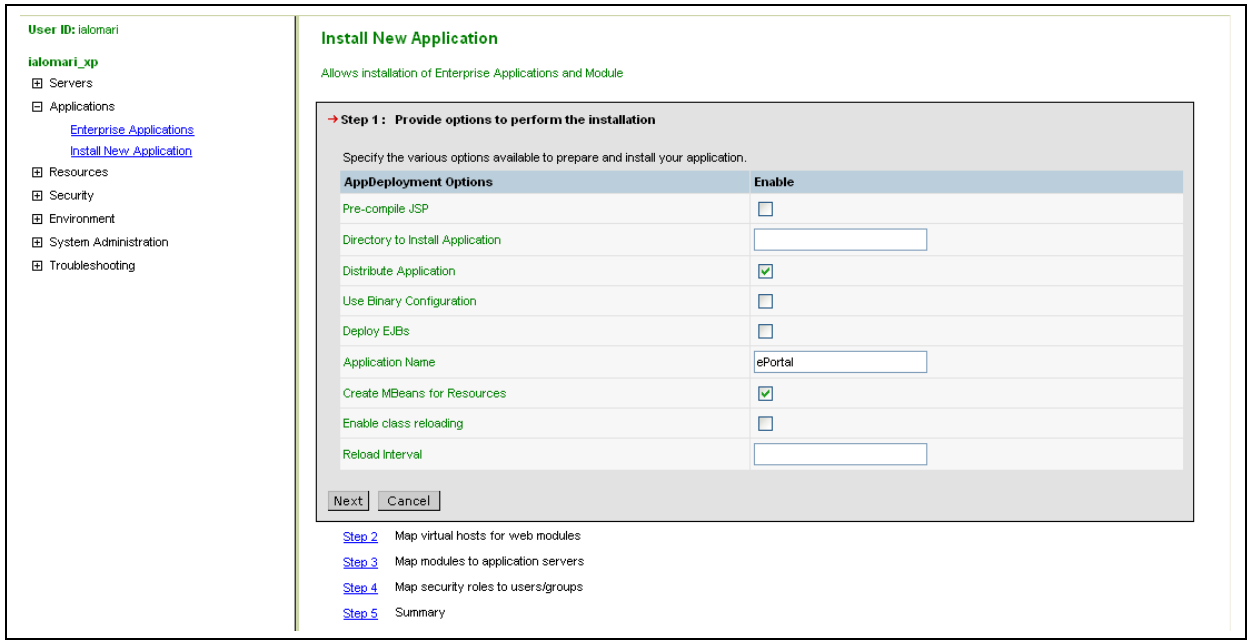
6 Check the **Generate Default Binding** check box, then click **Next**. See Figure 19.

Figure 19 Generate Default Binding Window



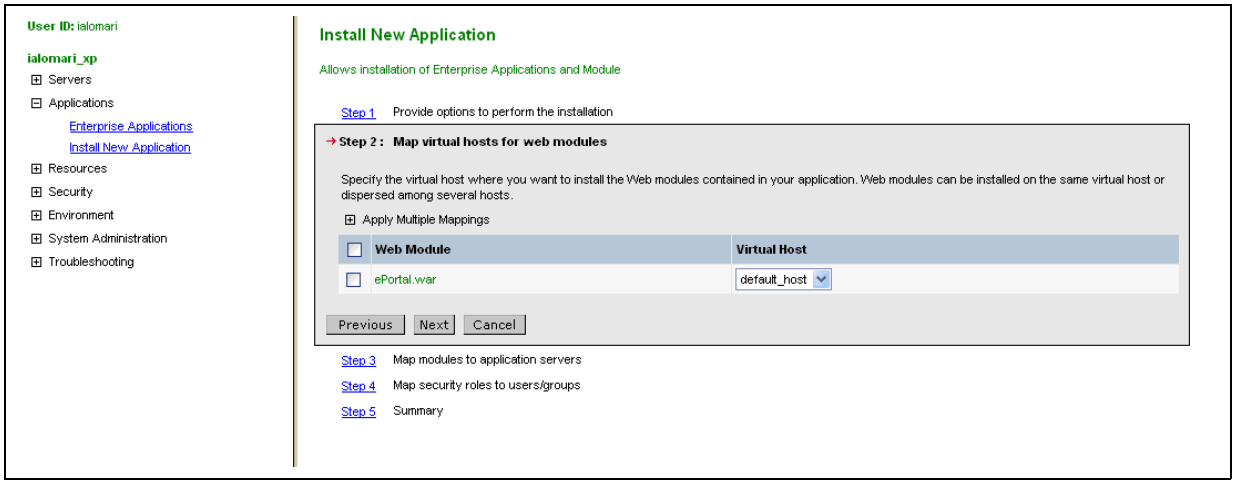
7 Keep **Step 1** as is and click **Next**. See Figure 20.

Figure 20 Deploying on WebSphere: Step 1 Window



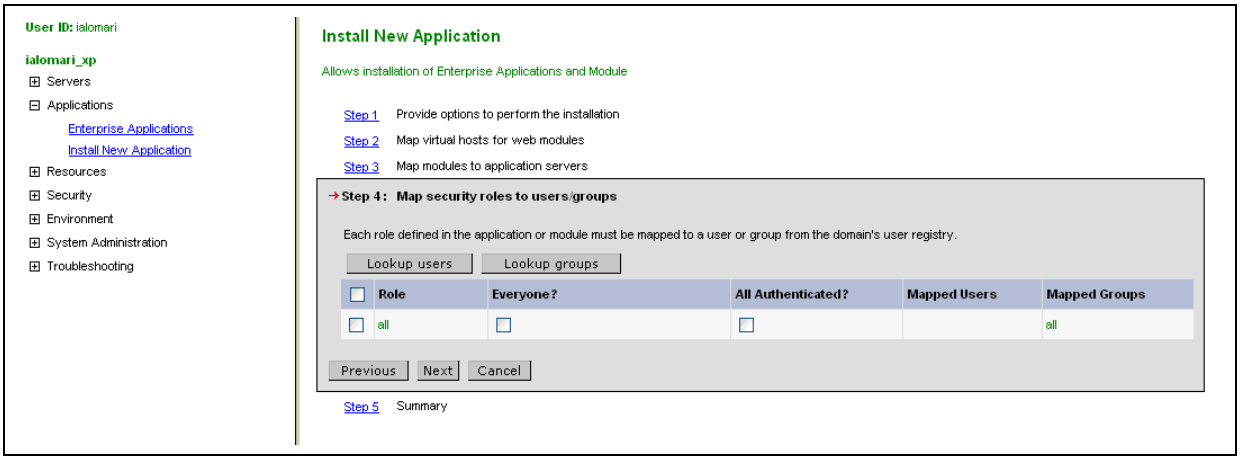
8 Under **Step 2**, check the box next to **ePortal.war** and click **Next**. See Figure 21.

Figure 21 Deploying on WebSphere: Step 2 Window



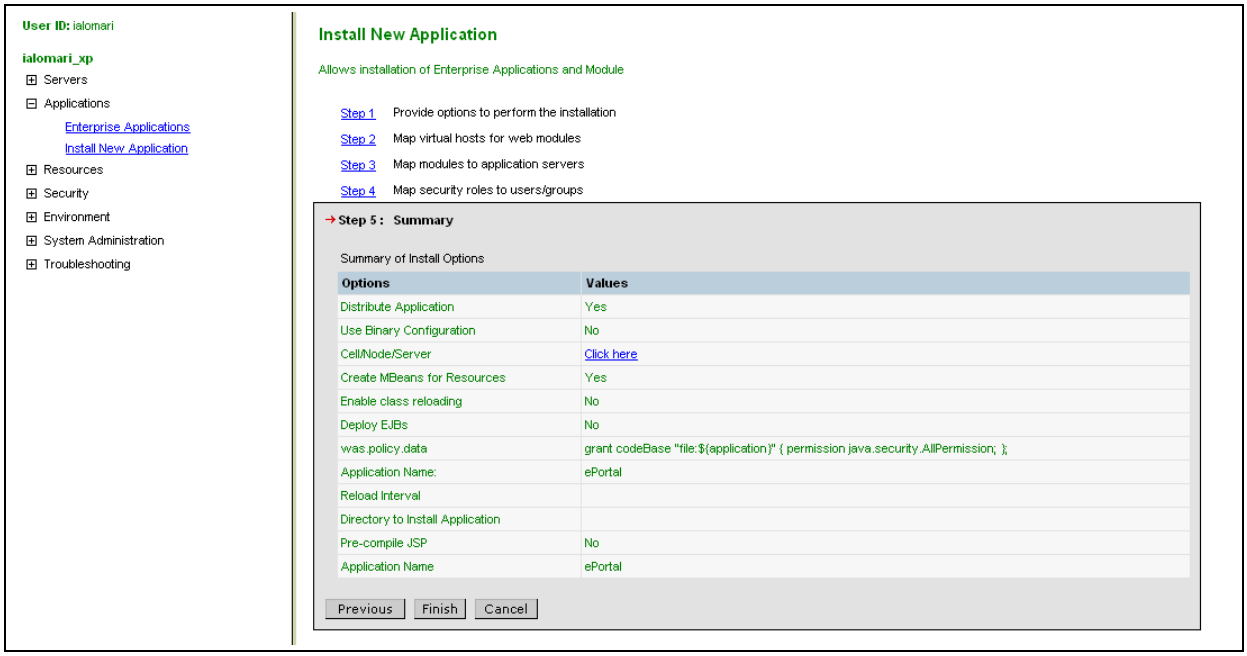
9 Under **Step 3**, check the box next to **ePortal.war** and click **Next**. See Figure 22.

Figure 22 Deploying on WebSphere: Step 3 Window



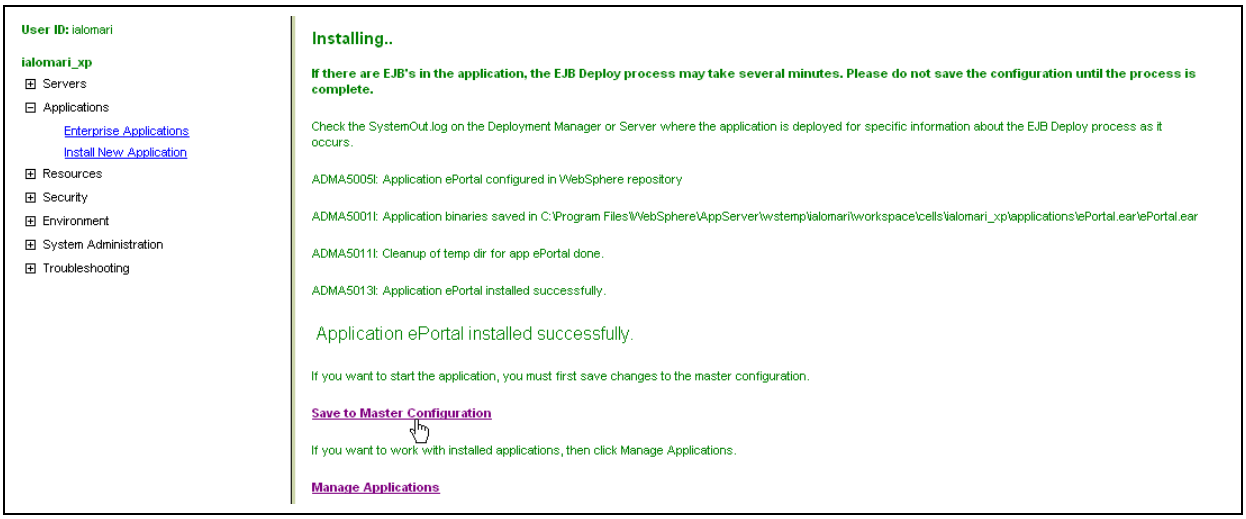
10 Keep **Step 4** as is and click **Finish**. See Figure 23.

Figure 23 Deploying on WebSphere: Step 4 Window



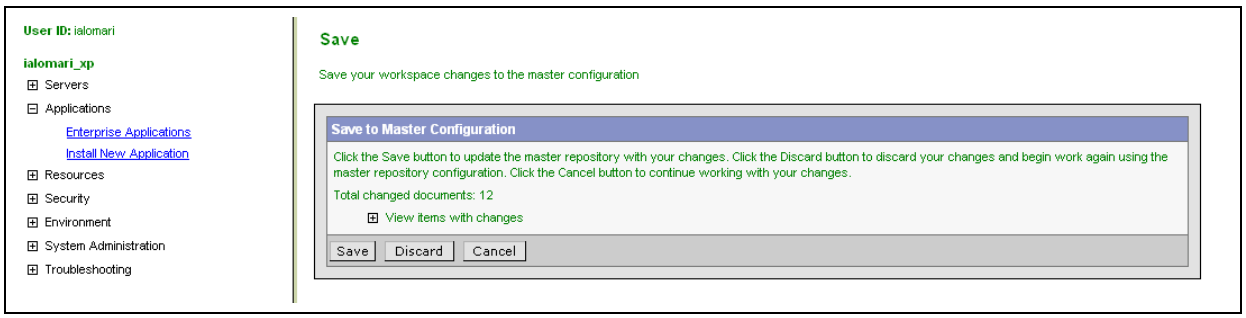
11 Click the **Save To Master Configuration** link. See Figure 24.

Figure 24 Save To Master Configuration



The Save window appears. See Figure 25.

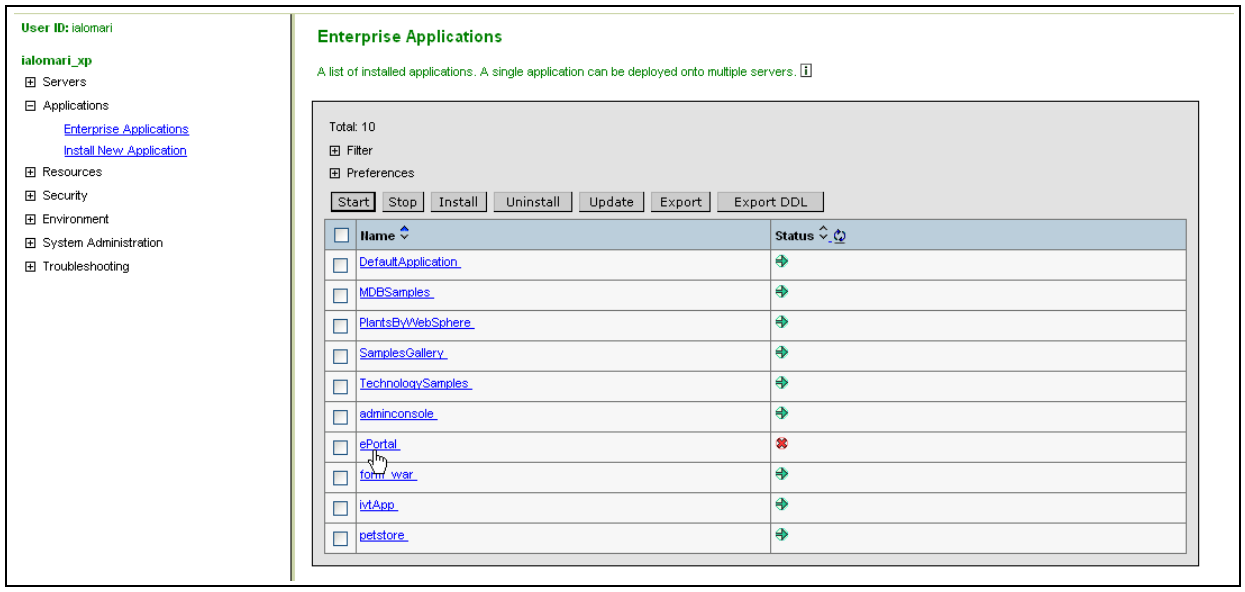
Figure 25 Save Window



12 Click **Save**.

The Enterprise Applications window appears. See Figure 26.

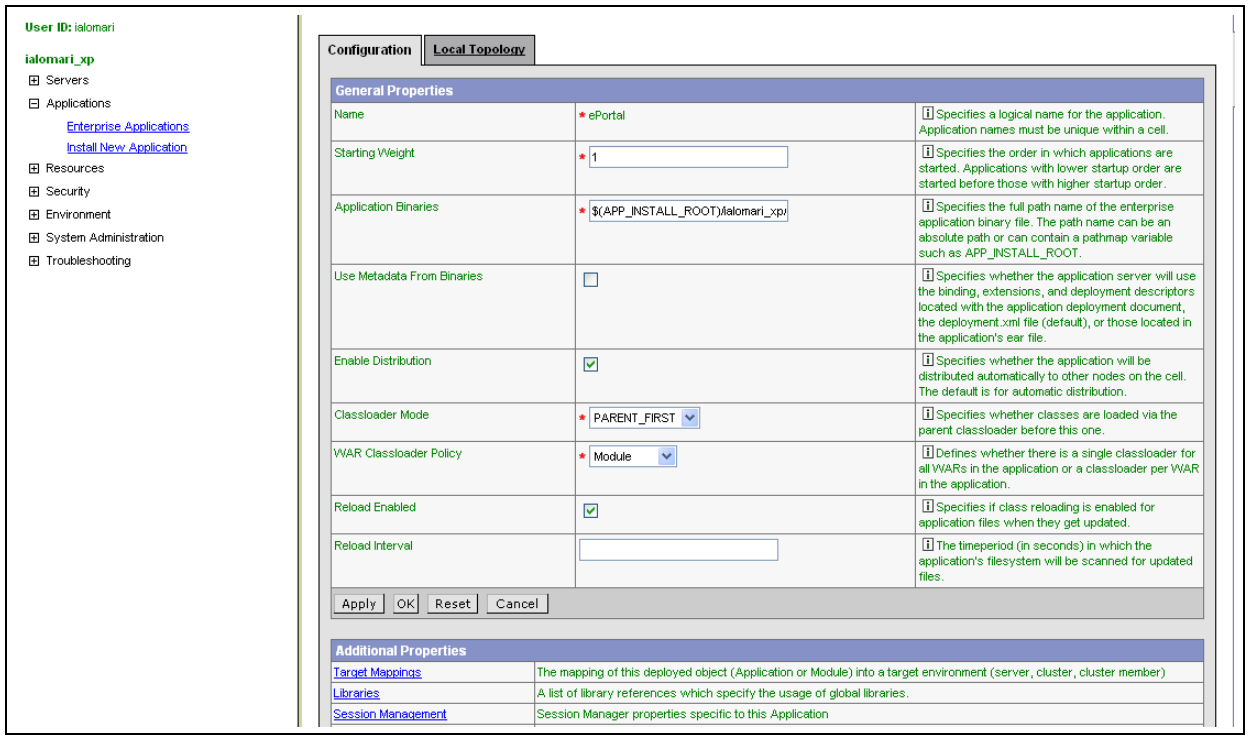
Figure 26 Enterprise Applications Window



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

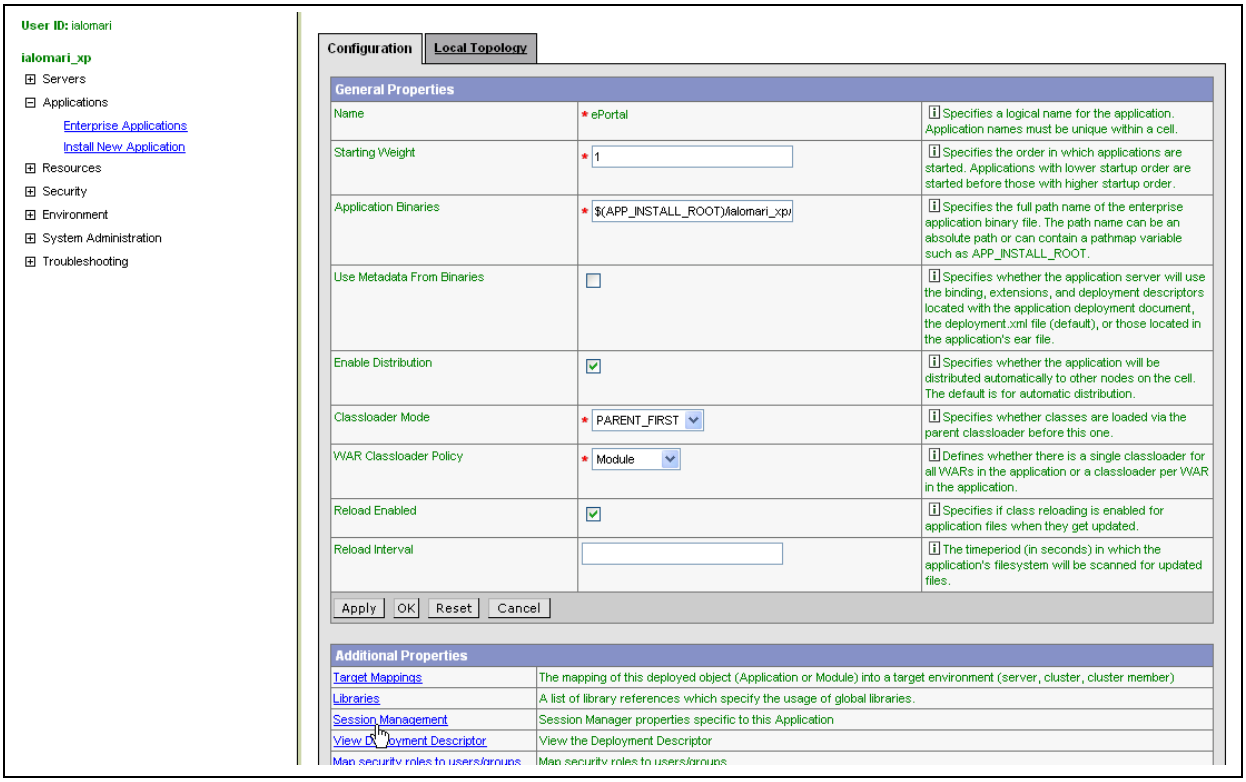
13 Click the **Configuration** tab and make sure the parameters are configured as shown in Figure 27. When you are finished, click **OK** or **Apply**.

Figure 27 Configuration Tab



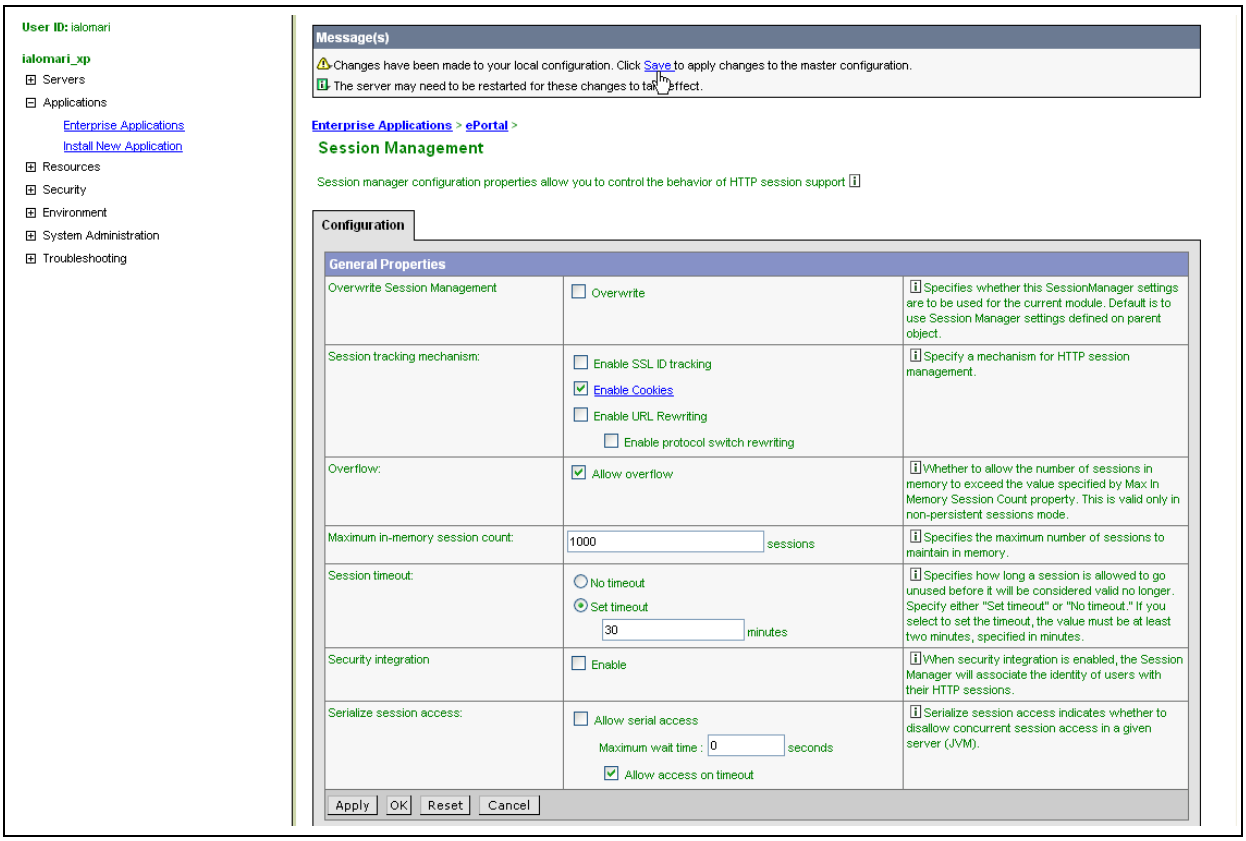
14 Click the **Session Management** link. See Figure 28.

Figure 28 Session Management Link



15 Make sure the parameters are configured as shown in Figure 29. Check to make sure cookies are enabled. When you are finished, click **OK** or **Apply**.

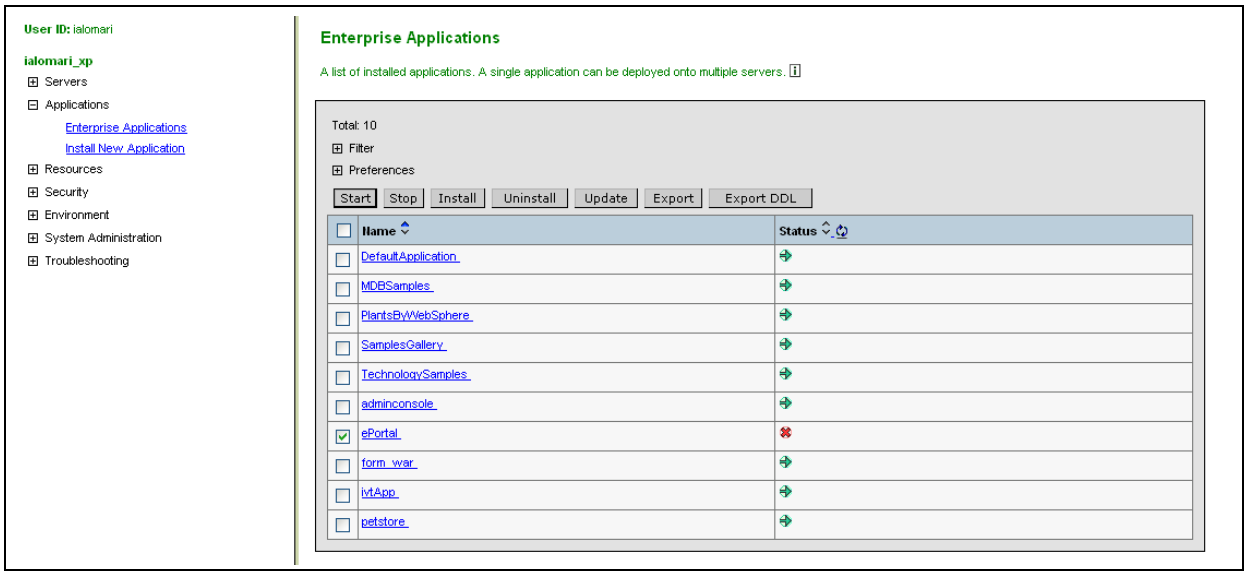
Figure 29 Session Management Parameters



The Enterprise Applications window appears again.

16 Under the **Names** column, click the box next to **ePortal.war**, and click **Start**. See Figure 30.

Figure 30 Configuration Tab



This action runs the ePortal application.

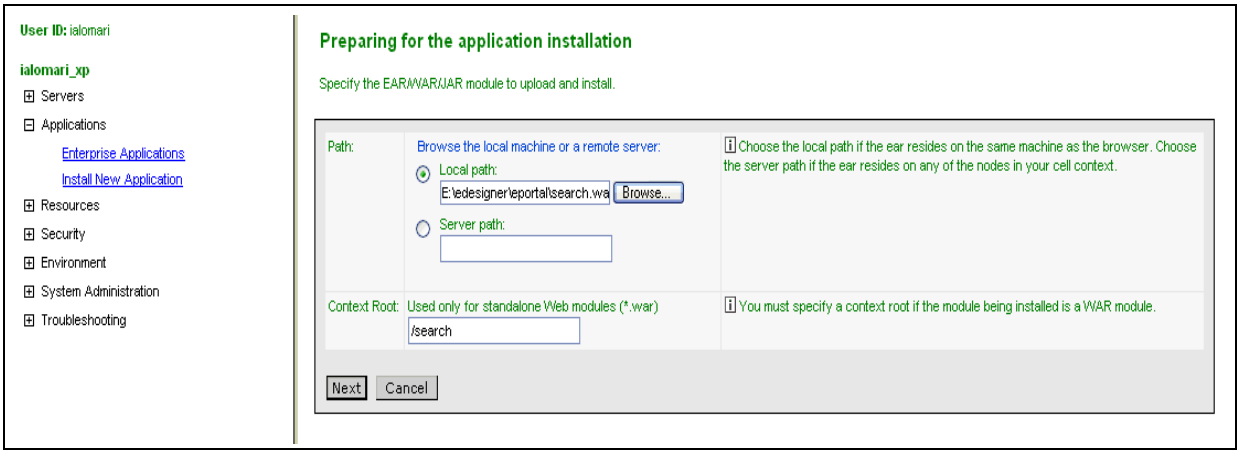
To install the ePortal search engine on WebSphere

1 Make sure that the WebSphere server is running.

2 Start the WebSphere Administrative Console.

3 Click the **Preparing for the application installation** link and enter the values in the window as shown in Figure 31. Then click **Next**.

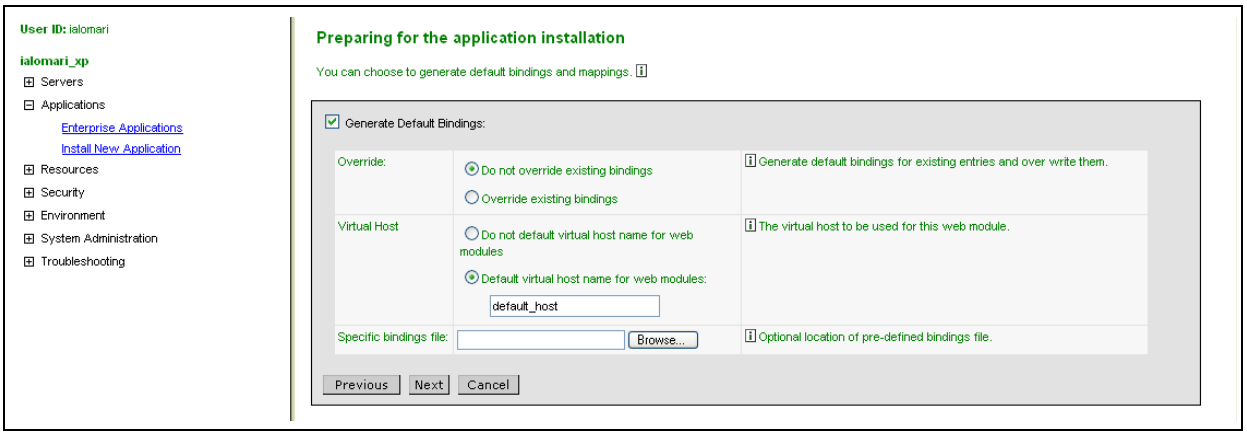
Figure 31 Preparing for the Application Installation Page (Search 1)



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

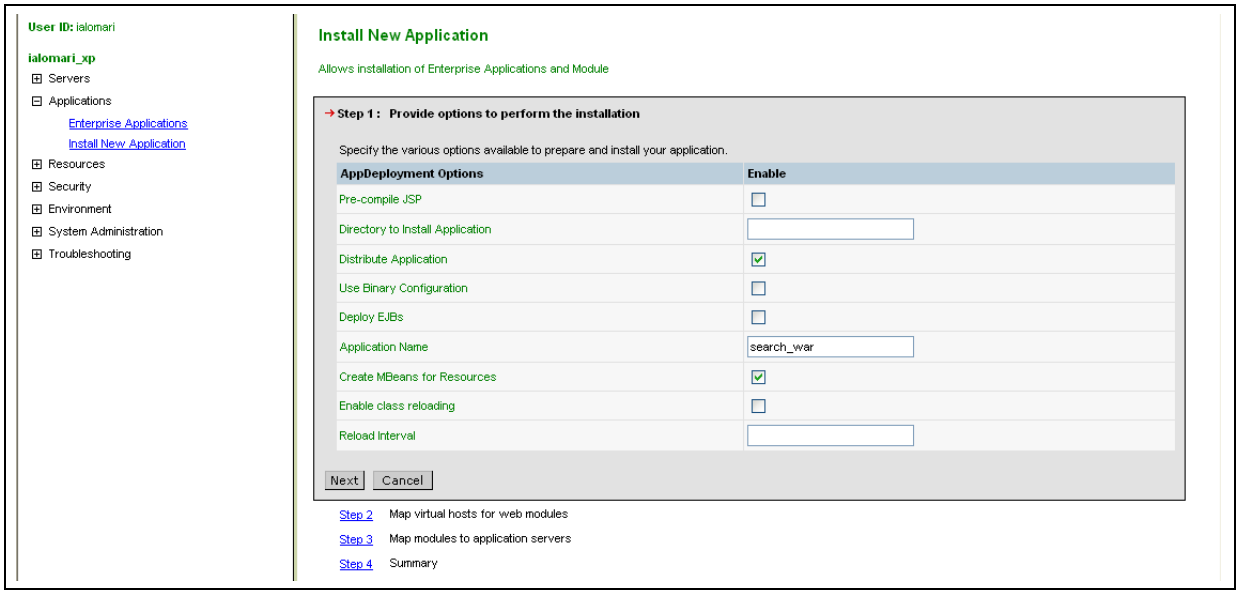
4 Enter the parameters in the next window as shown in Figure 32. Then click **Next**.

Figure 32 Preparing for the Application Installation Page (Search 2)



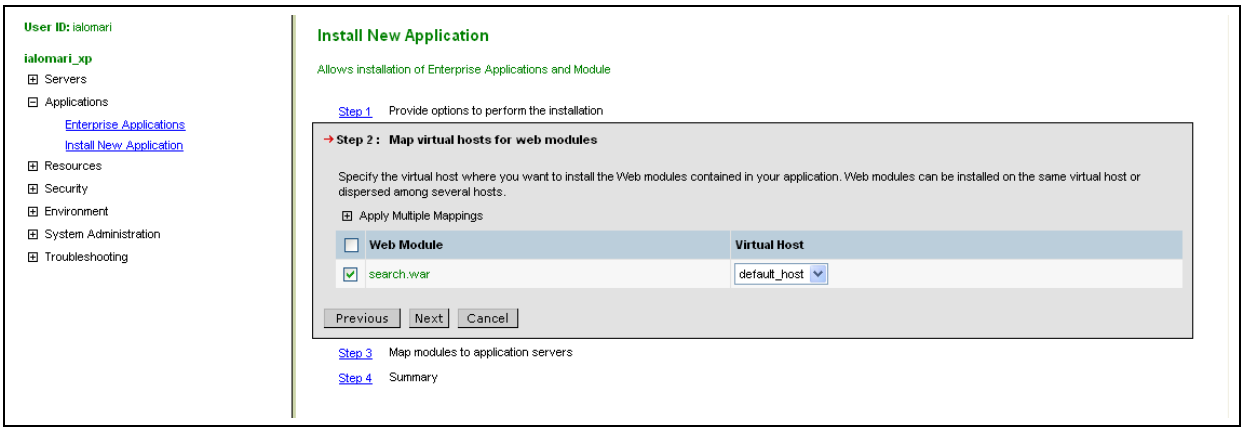
5 Click the **Install New Application** link and enter the values in the window as shown in Figure 33, under **Step 1**. Then click **Next**.

Figure 33 Installing Search Engine: Step 1 Window



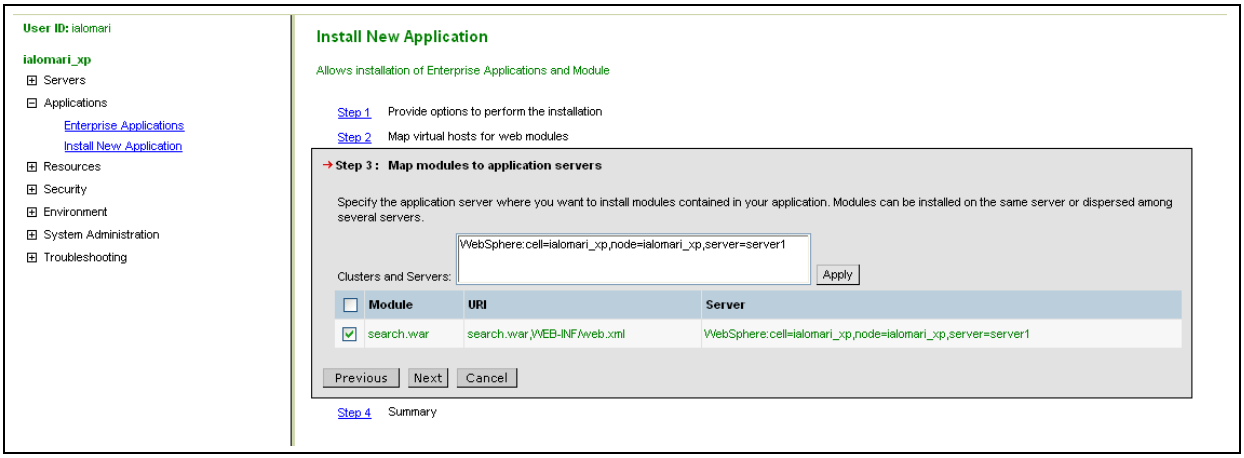
6 Under **Step 2**, enter the additional values in the window as shown in Figure 34. Then click **Next**.

Figure 34 Installing Search Engine: Step 2 Window



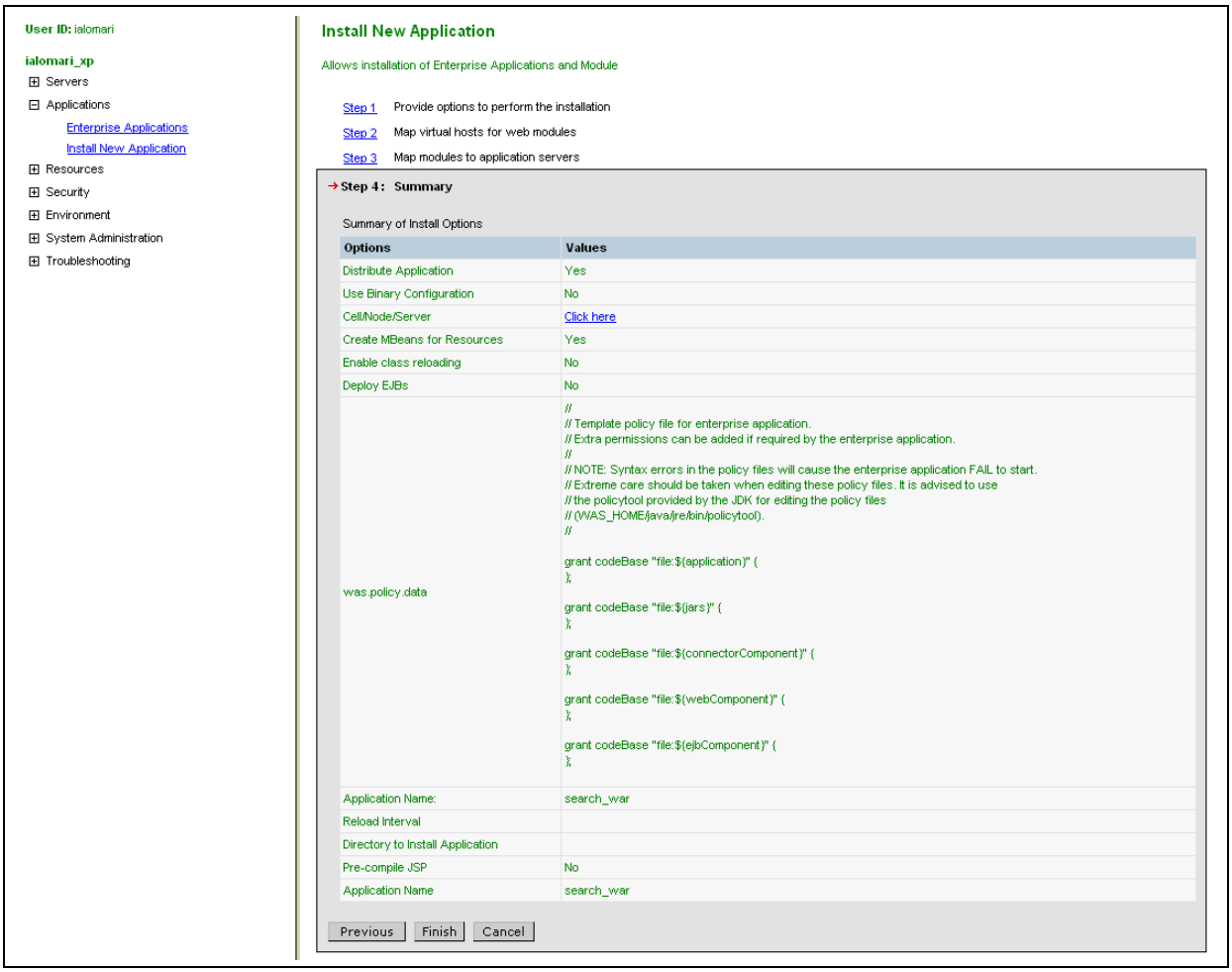
7 Under **Step 3**, enter the values in the window as shown in Figure 35. Then click **Next**.

Figure 35 Installing Search Engine: Step 3 Window



8 **Step 4** shows a summary of all the values you have entered so far. See Figure 36. If these values are correct, click **Next**.

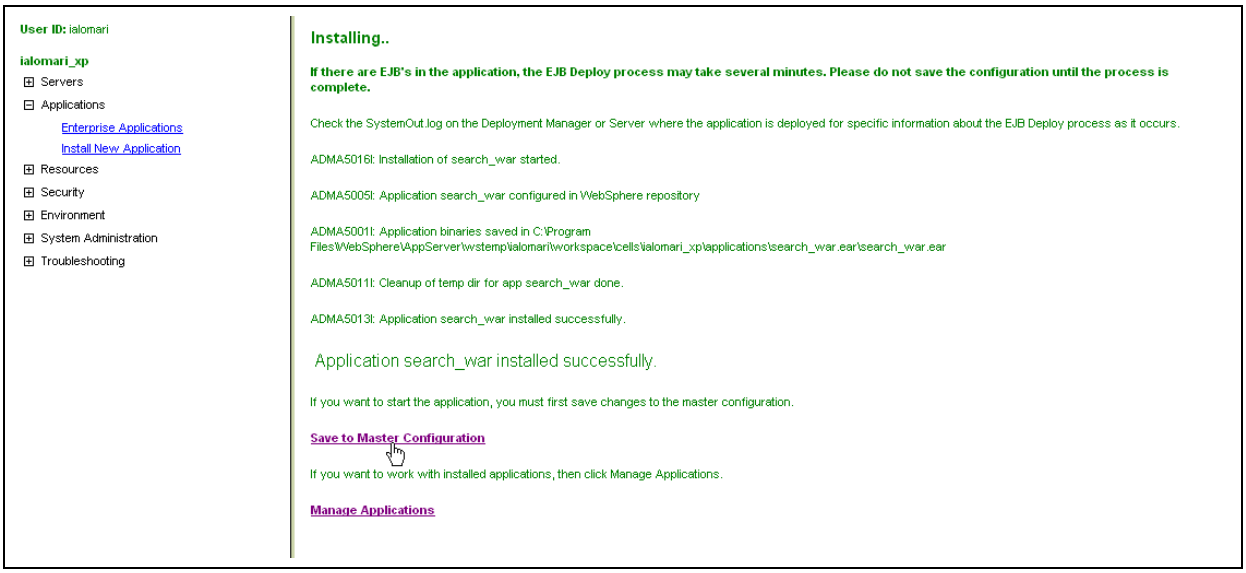
Figure 36 Installing Search Engine: Step 4 Window



A window appears telling you the search engine is installing.

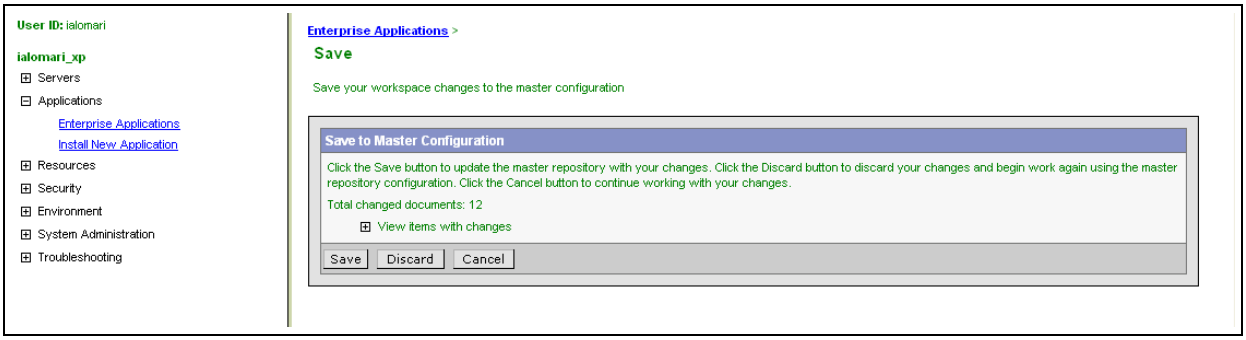
9 When this install operation is finished, click the **Save to Master Configuration** link. See Figure 37.

Figure 37 Install Operation Window



10 Click **Save** to save your search engine configuration. See Figure 38.

Figure 38 Save to Master Configuration



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

Chapter 4

ePortal Administration

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

4.1 Overview

Only ePortal server administrators are allowed to create, publish, and modify channels, groups, and categories. The administrator assigns privileges to groups and users, as well as determining the user makeup of groups.

This chapter explains these features and how to do these operations. The procedures documented in this chapter assume that you have ePortal server Administrator privileges.

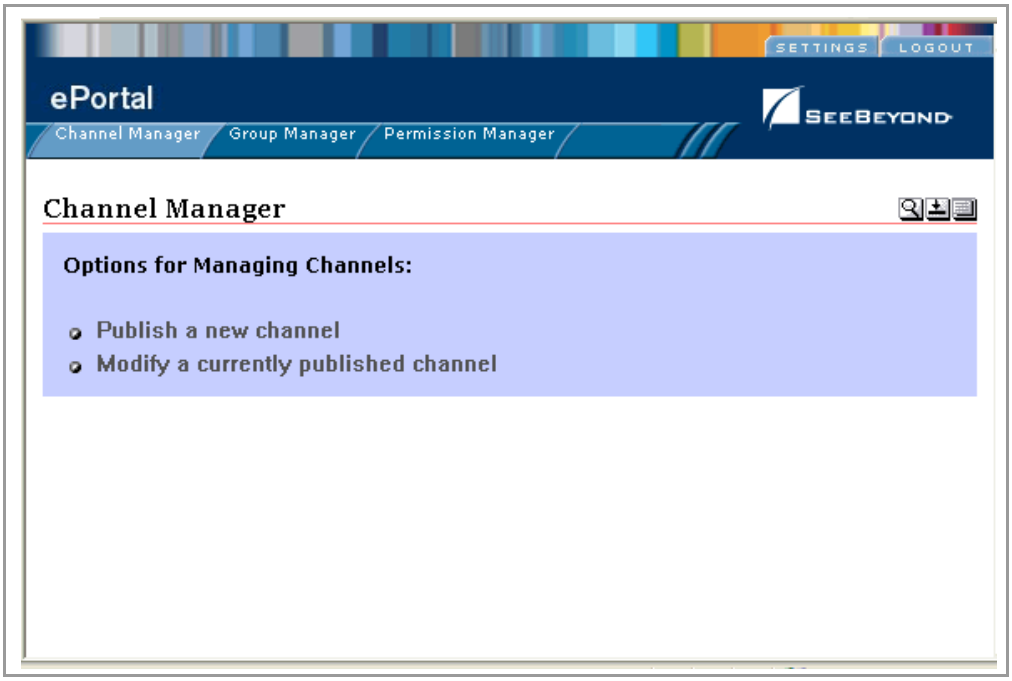
This Chapter Includes

- **"Basic Administration Operations" on page 57**
- **"Managing Channels" on page 58**
- **"Managing Groups" on page 66**
- **"Managing Permissions" on page 75**

4.2 Basic Administration Operations

When you log in to ePortal, you see the window shown in Figure 39.

Figure 39 Administrator Startup/Channel Manager Window



This window has tabs that allow you to do the following operations:

- **Channel Manager**
- **Group Manager**
- **Permission Manager**

This chapter explains these basic ePortal operations.

Logging in as template or guest

By logging in as **template** or **guest**, the system administrator can change the look of log-in 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.

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

4.3 Managing Channels

A channel (sometimes called a *portlet*) is the mechanism through which enterprise data is aggregated and distributed. Multiple channels can be assigned to a single portal. This section explains channel management in ePortal.

4.3.1 Publishing a New Channel

The procedure in this section explains how to publish a new channel.

Note: *You can create channels in several formats, however, in this guide only the* ***Inline Frame*** *format is described. For a list of supported formats, see* **"Channel Types" on page 58**.

Channel Types

ePortal allows you to set up the following channel types:

- The **Custom** channel type allows the publication of channels with no accompanying Channel Publishing Document (CPD). It is typically used to publish channels with only one corresponding channel definition.
- The **Inline Frame** channel type renders an HTML page within a frame. This is not supported in browsers older than Internet Explorer 5.0 and Netscape 6.0.
- The **RSS** channel type renders content provided in the Rich Site Summary (RSS).
- The **Web Proxy** channel type incorporates a dynamic HTML or XML application.
- The **XML Transformation** channel type 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.

Publishing a New Channel

To Publish a new channel

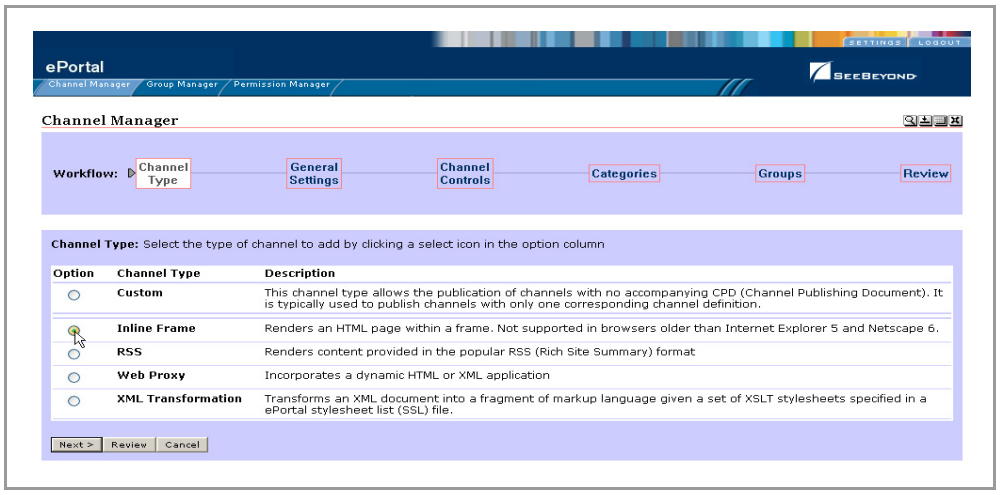
1. Start your browser and log into ePortal.

   The Administrator's startup page opens. The **Channel Manager** tab is the default startup window. See **Figure 39 on page 57**.

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

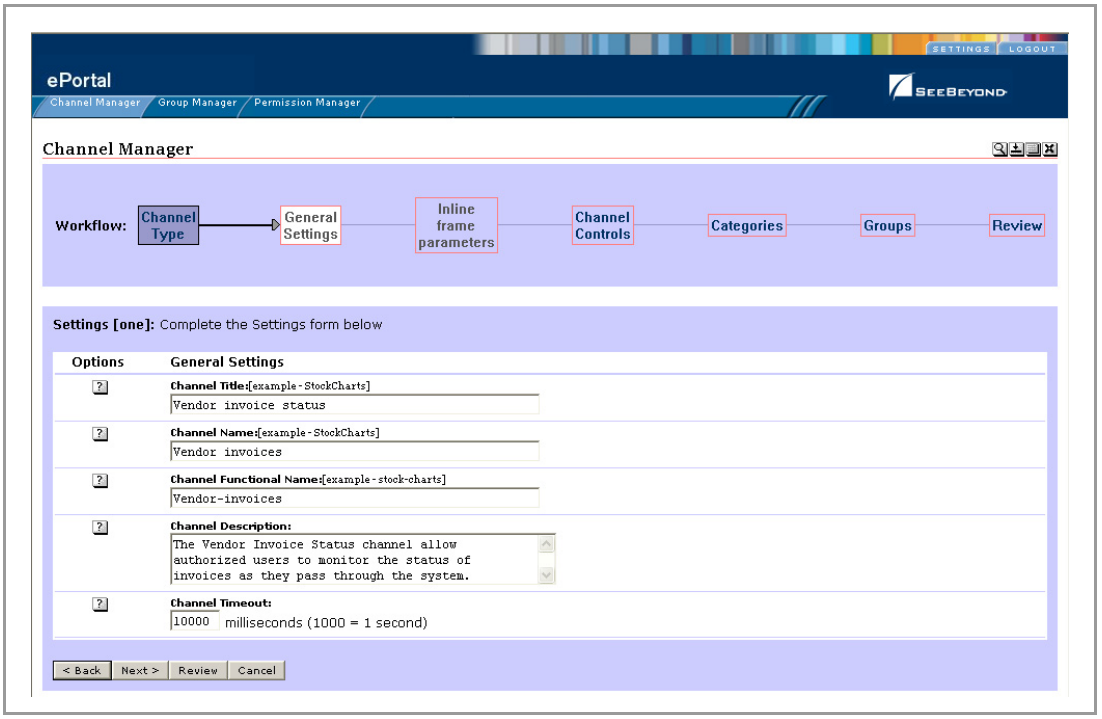
3 In the **Channel Type** area, select a channel layout option, for example: **Inline Frame**. See Figure 40.

Figure 40 Publishing a Channel



4 Click **Next**. See Figure 41.

Figure 41 Specifying an In-line Frame

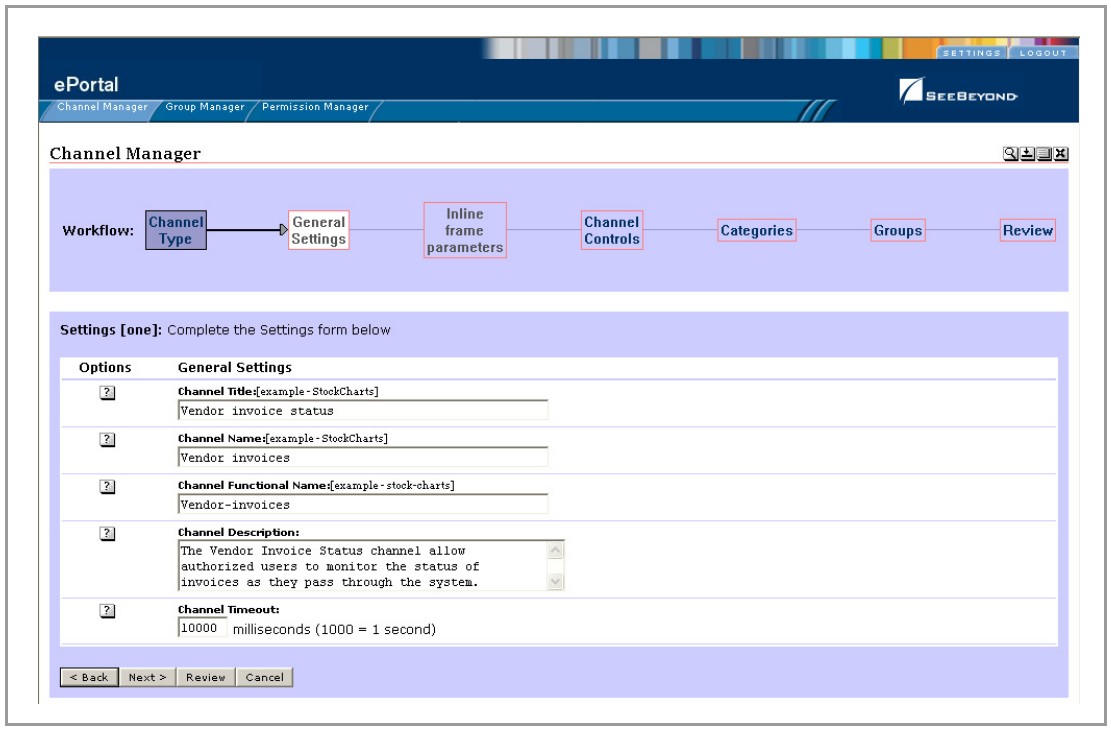


5 In the **Settings** area, type the following information in the labeled fields:

- **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 configuring a channel's layout, security, and view for a particular user. If you open a channel in a separate window, this name appears in the window's title bar.
- **Channel Description**: A short overview of the channel's purpose.
- **Channel Functional Name**: An optional unique name you can give a channel for identification purposes, for example, **/news/cnn** for CNN. See **Figure 49 on page 66** for an example.
- **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.

6 Type in the desired information, and then click **Next**. See Figure 42.

Figure 42 Specifying general channel settings



7 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.

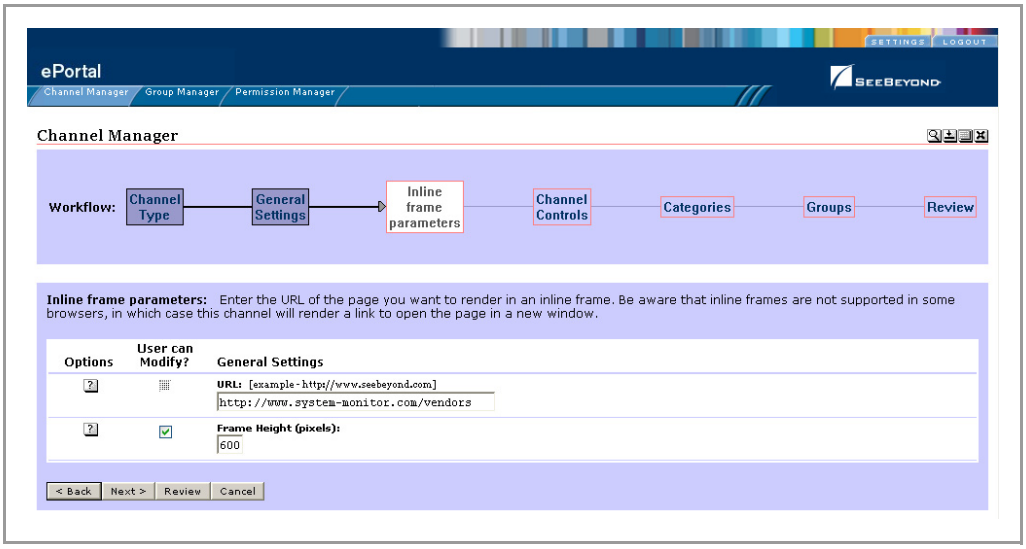
Caution: *Do not use **localhost**. If more than one machine uses this designation, ePortal does not interpret it correctly.*

8 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 43 on page 61**.

Figure 43 Setting In-line Frame Parameters



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.*

9 Click **Next**.

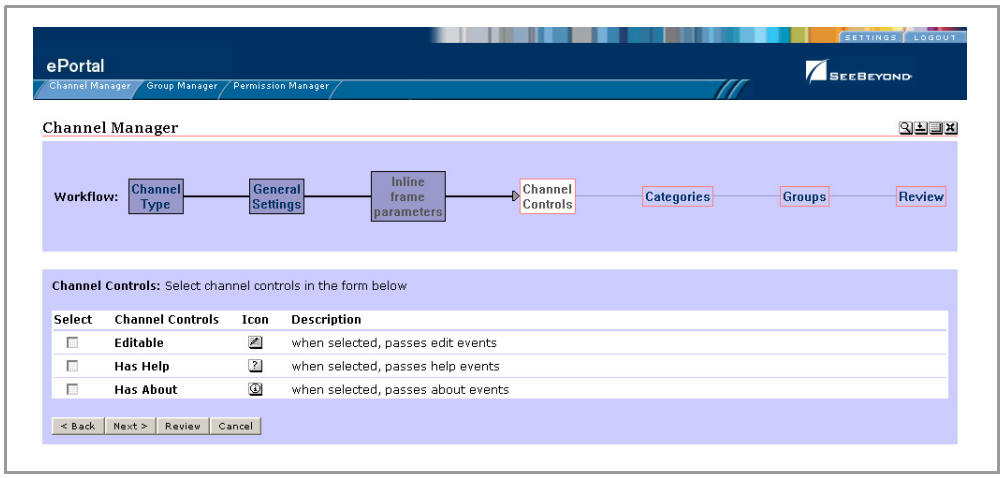
10 In the **Channel Controls** area, under the **Select** heading, select or clear the controls you want to add to the channel.

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

See **Figure 44 on page 62**.

Figure 44 Setting channel controls



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

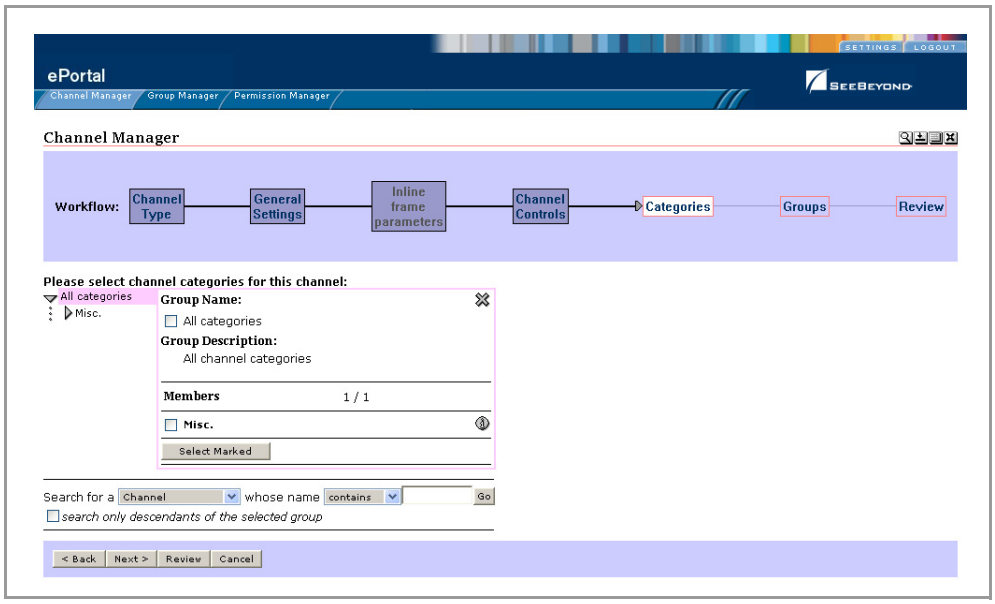
12 In the **Categories** area, to assign the channel to one or more categories, select the drop-down arrow and select an appropriate category from the list.

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

13 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 45.

Figure 45 Assigning a Category



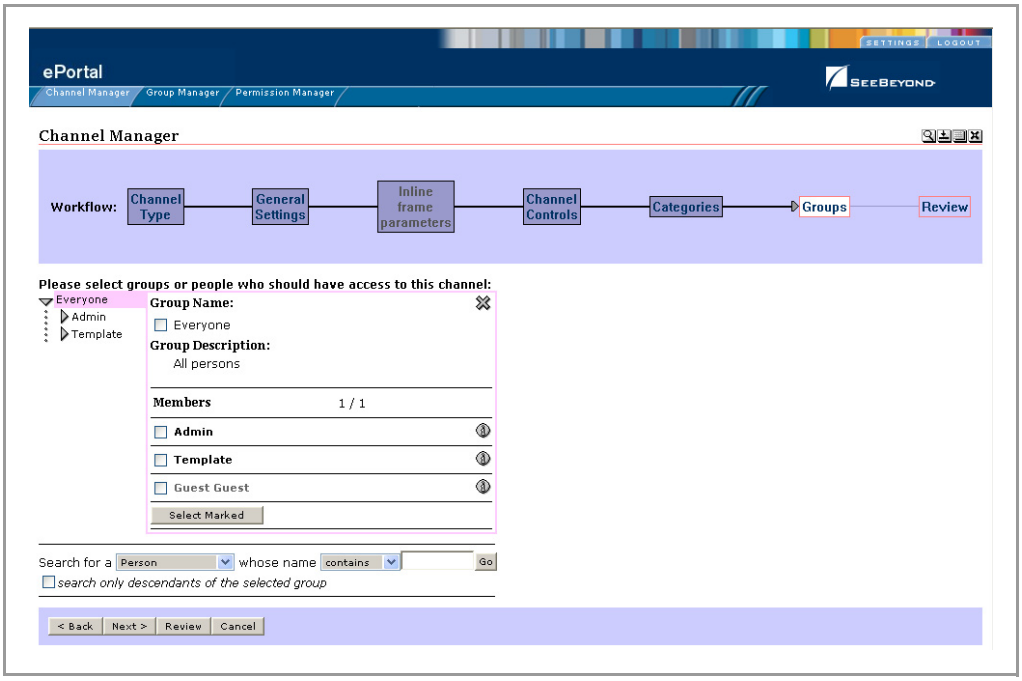
14 When you are finished, click **Next**.

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

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

The group is displayed to the right of the **X** under the **Selected Group** heading. To remove the channel from the group, under the **Option** heading, click **X**. See Figure 46.

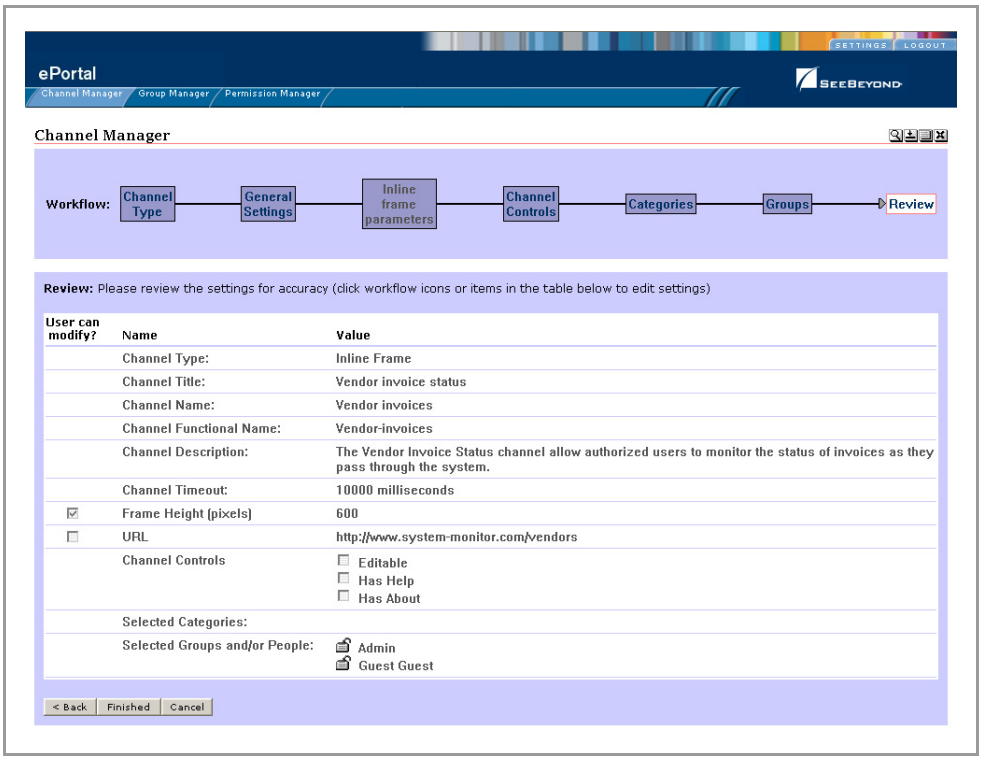
Figure 46 Assigning a Group



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

17 In the **Review** area, audit the information you provided for the channel. See Figure 47.

Figure 47 Reviewing Channel Parameters



18 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 are discarded.*

4.3.2 Publishing a Search Channel

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

Creating a Channel for the Search Module

To enable this facility, 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 58**.

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 ePortal, for example: **18004**.

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

For a complete explanation of ePortal's search feature, see **"Using the ePortal Search Engine" on page 89**.

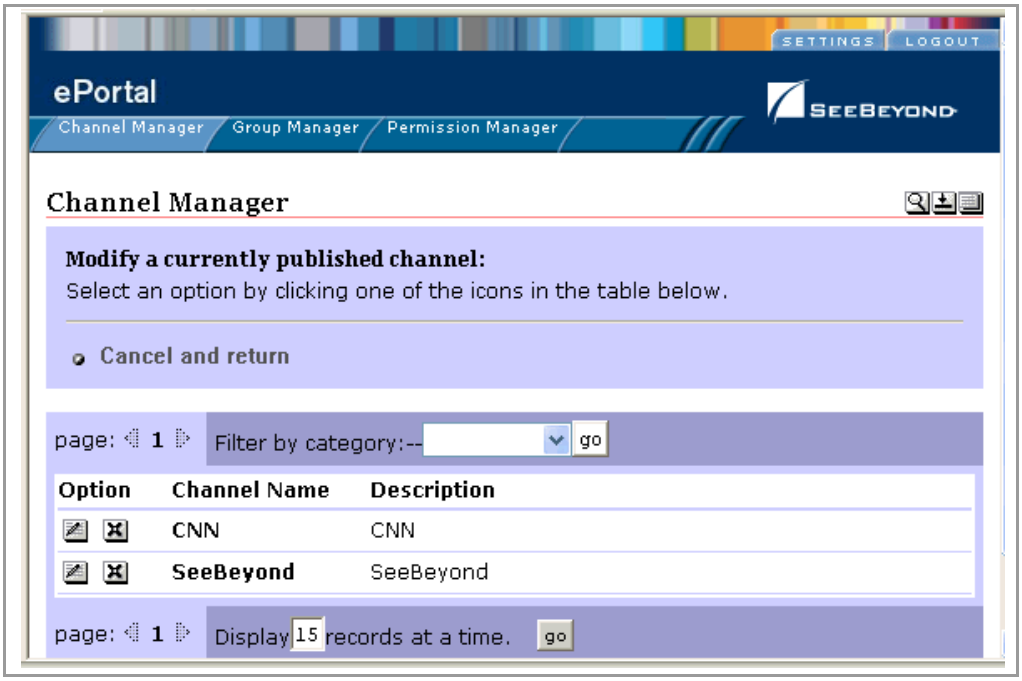
4.3.3 Modifying a Channel

ePortal allows you to edit or remove any existing channel.

To edit or remove a channel

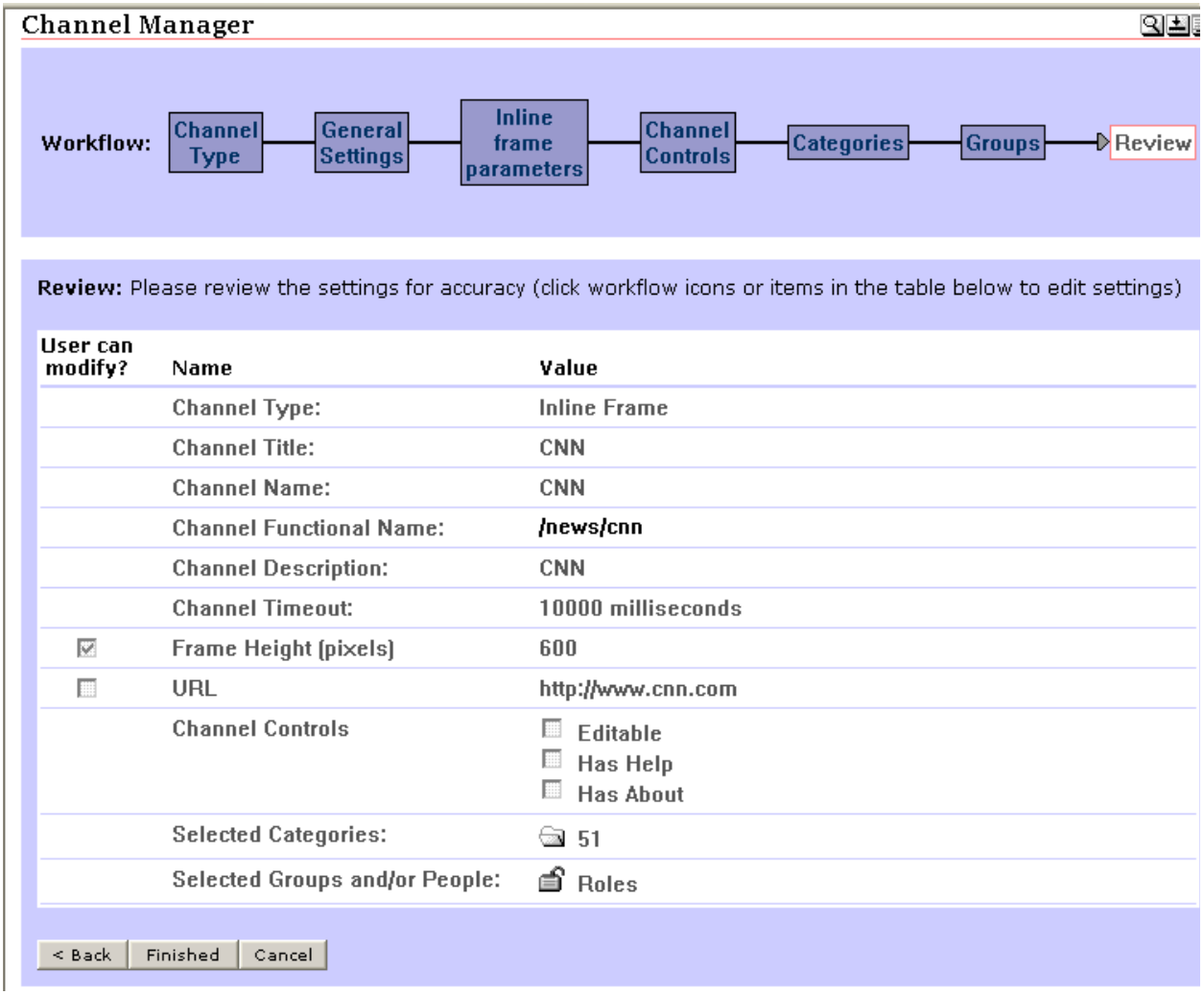
1. Select **Modifying a Currently Published Channel** on the Channel Manager tab. See **Figure 39 on page 57**.
2. You can remove a group by clicking the **Remove Member** button or edit a group by clicking the **Edit Member** button. See Figure 48.

Figure 48 Modifying a Channel



3. If you decide to edit a channel, the window shown in **Figure 49 on page 66** appears.

Figure 49 Editing a Channel



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

4 To continue, click **Channel Type**.

5 Finish modifying a channel in the same way as you publish a new one, except for the addition of a modify **Inline Frame Parameters** step. This step allows you to modify the URL and frame height.

See the **procedure on page 58** for details on the rest of the steps.

6 To remove a channel, click the **Remove** button (**X**) under the **Option** column. See **Figure 48 on page 65**.

4.4 Managing Groups

ePortal allows you to collect users into groups. This section describes how to create and modify groups via ePortal's Group Manager channel.

4.4.1 About Groups

In the portal context, a group is a collection of channels, groups, and sub-groups that logically go together, based on a related purpose or interdependencies. Groups are structured in a hierarchy that is defined and maintained by the system administrator. The **Group Manager** channel allows the administrator to manipulate groups and group members, and specify their permissions. By default, the administrator is automatically granted unlimited permissions.

Note: *For more information on assigning permissions, see* **"Managing Permissions" on page 75**.

The Group Manager channel allows you to:

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

When you start the Group Manager channel as the administrator, all root groups are displayed. The Group Manager channel provides *views* of existing groups and a includes an editing mechanism that allows you to define attributes and specify permissions for new and existing groups. A group's *details* can be reviewed and edited.

The *root group* is a special group that is the parent of all groups of a particular type. Root groups are also used by the search function to determine the types of groups that can be searched. In a typical implementation, the root group contains the channel definitions for all other groups.

The ePortal Group Hierarchy

In ePortal, groups are structured in a simple hierarchy as follows:

- Channels and sub-groups of channels
- Roles and sub-groups of roles

For more information, see **"Creating and Updating Groups" on page 68**.

The Group Manager Channel

The Group Manager channel provides the following views of groups and group information:

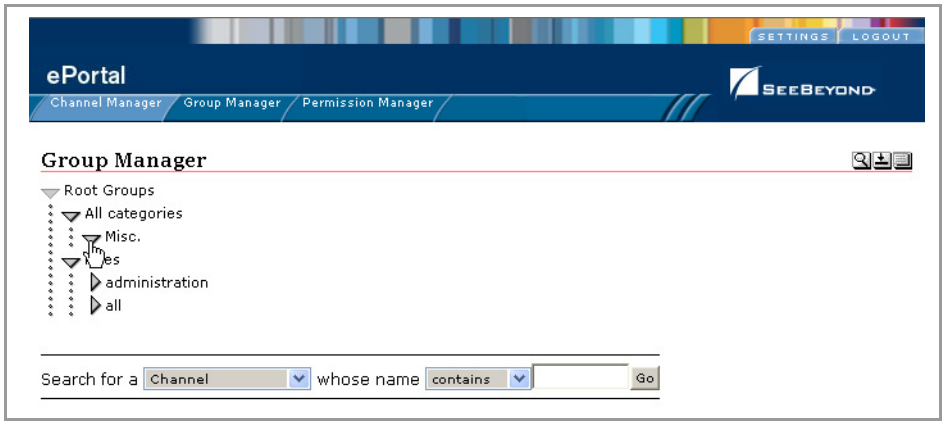
- **Detail** view displays information about a selected group.
- **Edit** view allows you to update a group's information.
- **Add Members** view allows you to add members to a group.
- **Assign Permissions** view allows you to assign permissions to groups.
- The **Search** facility allows you to search Groups for information based on keyword.

4.4.2 Group Manager Detail View

Creating groups is accomplished in the **Detail** view. This view provides you with the necessary tools to create a new group, update group information, and assign permissions to groups and group members. The **Detail** view Web interface presents a collection of tools that allow you to use the Group Manager's services.

Figure 50 shows an example of the Detail view.

Figure 50 Detail View: Selecting a Group to View



Creating and Updating Groups

This section describes how to create and manipulate groups in the **Detail** view.

To create a group in the Detail view

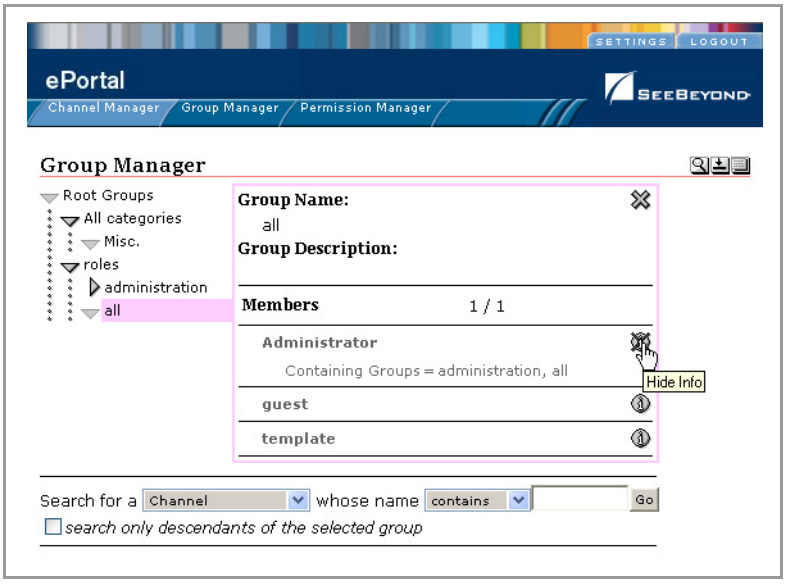
1. Start your browser and log into ePortal.
2. To start the Group Manager, click the **Group Manager** tab. See Figure 50.

3 To display the details of a group member, click the group name to display the group's information in **Detail** view. See Figure 50.

4 In **Detail** view, to display the properties of a group member in the information panel, click **Show Info**.

An information box appears. See **Figure 51 on page 69**.

Figure 51 Accessing Group Information in Detail View



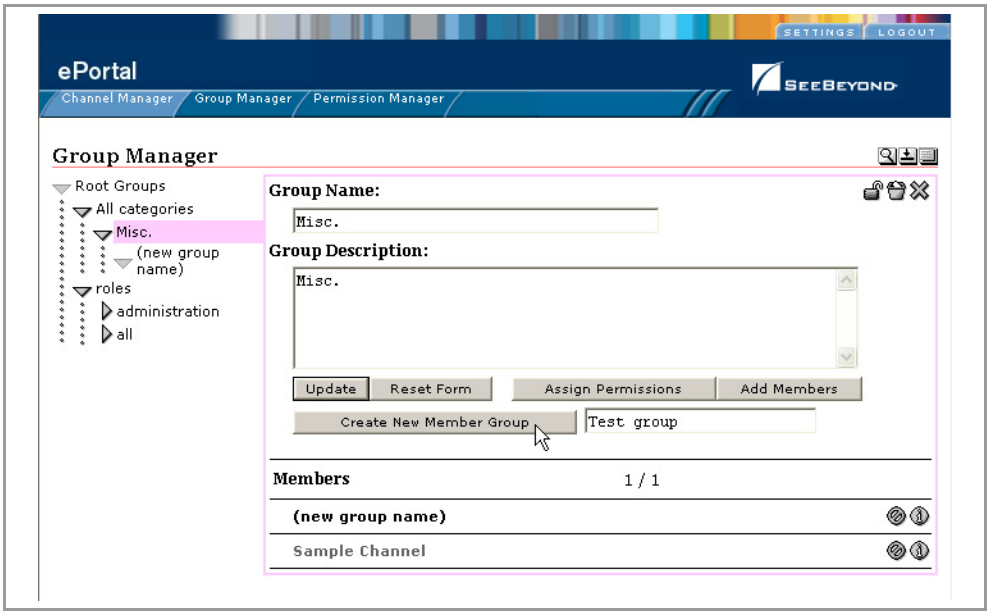
To close the information panel, click **Hide Info**.

The **Group Manager** channel displays all of the root groups. The administrator has no viewing limitations. The administrator sets permissions to specify which group members the non-administrators may see, as well as the functions that are available for each group member.

5 In the **Group Manager** panel, click the expander to the left of a group (for example, **Misc**) to reveal the list of sub-groups.

6 To create a new group, click **Create New Member Group**. See Figure 52.

Figure 52 Creating a New Group



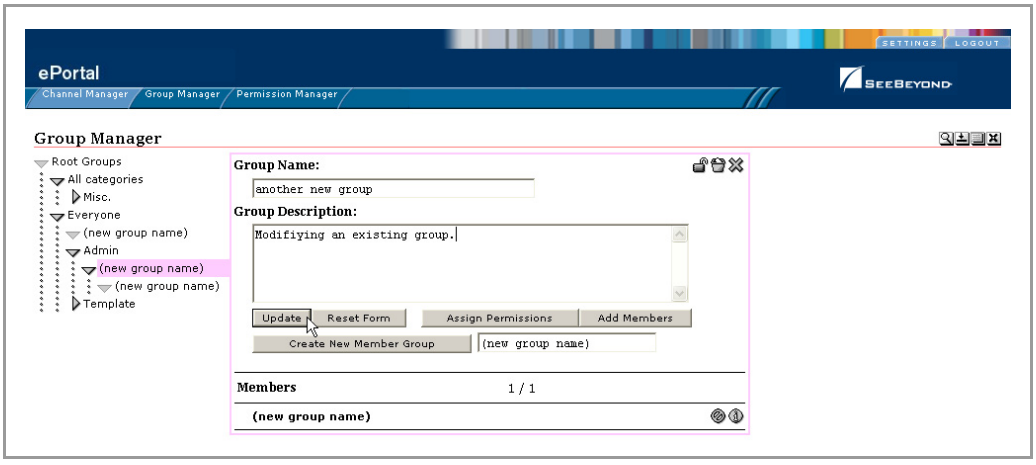
7 In the **Group Name** field, type a name for the group.

8 In the **Group Description** field, type a brief description for the group.

9 Click **Update**.

The new group name is written to the database and added to the list of groups within the **Group Manager**. See Figure 53.

Figure 53 Modifying a Group



Adding Members to a Group

To add a member to a group in the Detail view

1 Start your browser and log into ePortal.

2 On the Administrator's startup page, click the **Group Manager** tab.

3 To expand the list to view the existing groups, click the expander ▶ on the left of the **all** label.

4 To view the group you want to modify, click the expander ▶ on the left of the group name.

5 In the expanded list, select the group you want to modify.

6 In the **Detail** view, click **Add Members** to launch the **Add Members** view.

7 In the **Add Members** view, select a group member, select the appropriated check box aligned with the group, and then click **Select Marked**.

8 The view is updated by placing a permanent "**X**" alongside the selected members.

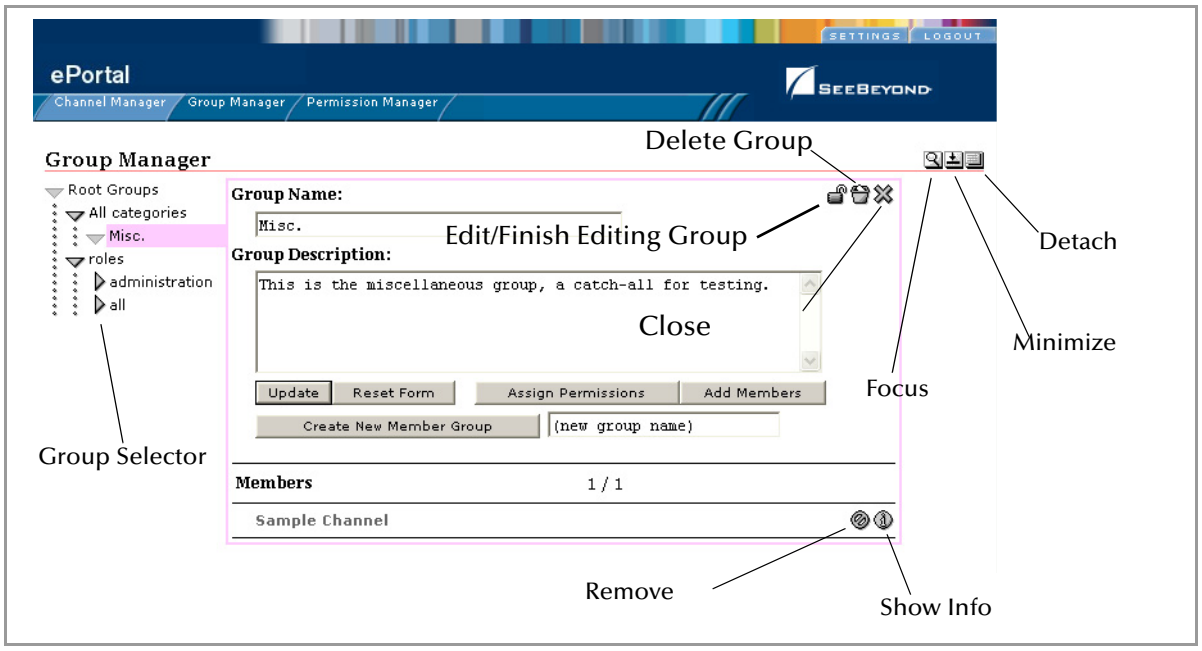
9 To finish, click **Done with Selection**.

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

4.4.3 Group Manager Edit View

On the **Edit** view interface, the Edit tools are represented by an assortment of small buttons. See Figure 54.

Figure 54 Group Manager Buttons in Edit View



For a complete explanation of the buttons in the **Edit** view, see **Table 2 on page 17**. This section explains how to create and manipulate groups in the **Detail** view.

Editing a Group's Information

The **Edit** view allows you to modify groups and group information, for example:

- To change the group name and description, click **Update**.
- To create a member group within a group, type the name of the new group in the f **(new group name)** field, and then click **Create New Member Group.**
- To add existing group members to a group, click **Add Members**.
- To assign permissions to the group, click **Assign Permissions**. This action launches the **Permissions Manager** channel. See **"Managing Permissions" on page 75** for details on this feature.
- To delete a group, click the **Remove** (**X**) button. This action physically deletes the group and removes references to it from all other groups.

4.4.4 Searching Groups

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

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

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

4.4.5 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.

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 **Group Manager** page 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 75**.

Like groups, a category can contains other categories as well as groups, sub-groups, and channels. This section explains how to manage channel categories.

Adding a New Category

To add a new category

1 On the Administrator's startup page, select the **Group Manager** tab.

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

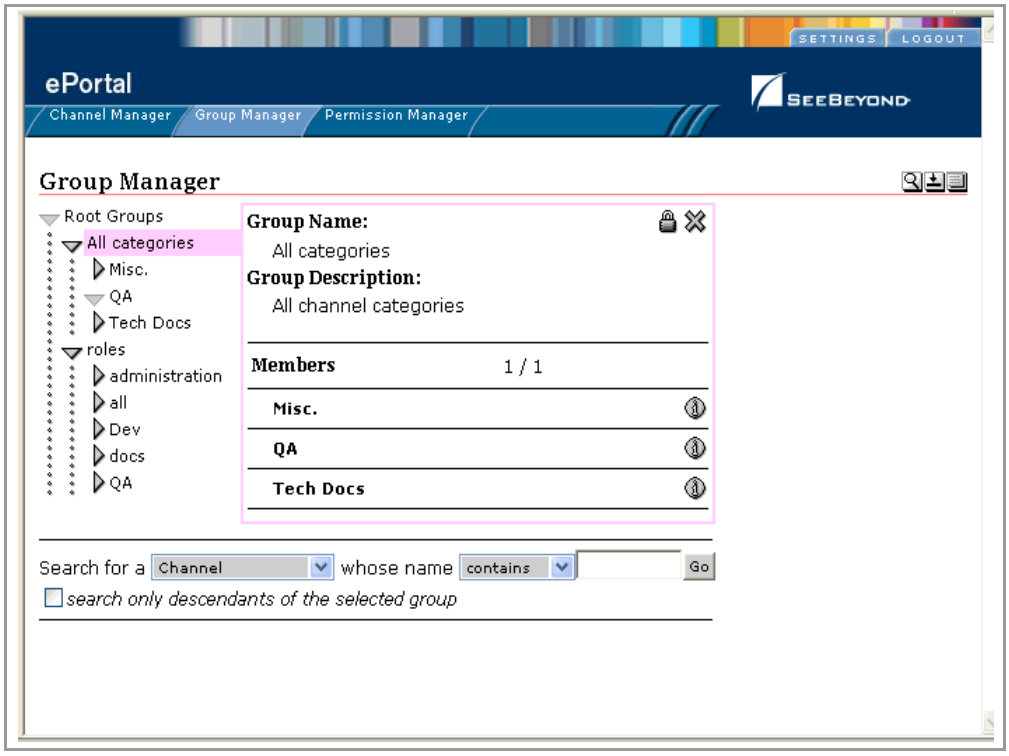
3 If necessary, click the expansion arrow ▼ to the left of the category, for example: **All categories**. You only need to do this step if you want to expand and show all the categories.

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

4 Click the name of the category under which you want to create the new category, for example, **All categories**.

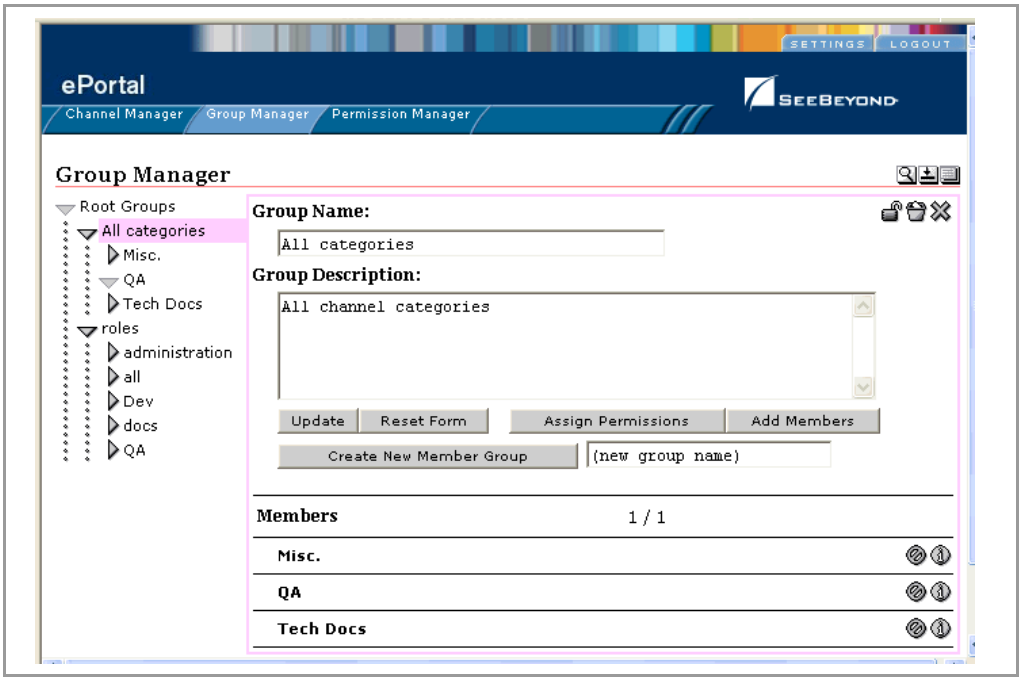
A box appears, allowing you to begin creating a new category. See Figure 55.

Figure 55 Creating a Category 1



5 Click the **Edit Group** button to expand the box. See **Figure 56 on page 74**.

Figure 56 Creating a Category 2



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 subcategory 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 Close the box.

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 55 on page 73**. Then repeat the steps in this procedure, as desired.

Modifying Categories

To modify an existing category

1 On the Administrator's startup page, select the **Group Manager** tab.

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 actions listed in step 7 in the **procedure on page 73**.

6 When you are finished, close the box.

To add groups and people to an existing category

1 On the Administrator's startup page, select the **Group Manager** tab. To expand the list to view the existing categories, click the expansion arrow to the left of the **All categories** label.

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 people.

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

6 When you are finished, close the box.

4.5 Managing Permissions

ePortal allows you to assign channel-use permissions to groups and categories. This section explains how the Administrator can assign these permissions via ePortal Composer's Permissions Manager channel.

4.5.1 About 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.

Permissions in ePortal operate as follows:

- You assign a permission to a principal to work with a target. A principal can be either:
  - User
  - Group of users

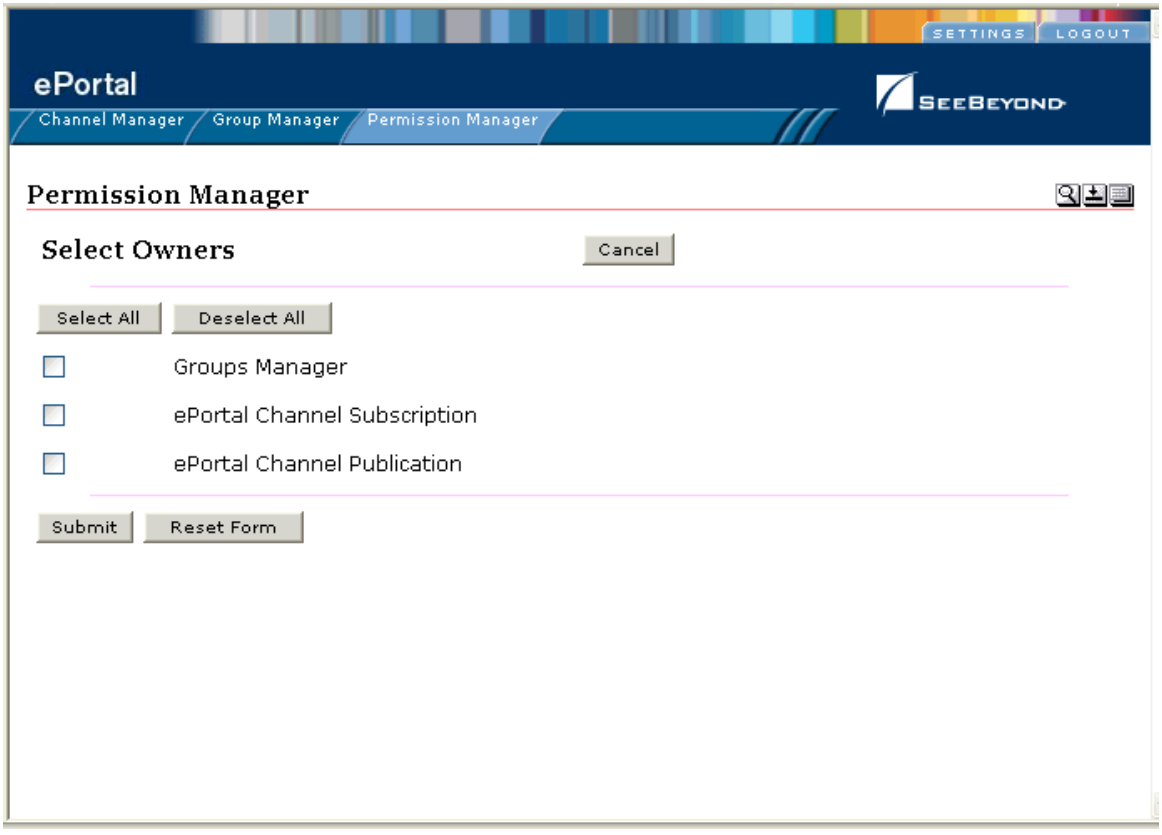
The principal is who is being allowed to use or restricted from using the current target.

- An activity can be, for example, publish, view, or subscribe, and varies 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, group, or user.
- Permission can be either;
  - Grant; for example, a *grant* allows a search to proceed up a selected branch.
  - Deny; for example, a *deny* stops a search from proceeding up a selected branch.
  - <blank>, which inherits grants and/or denies from the groups that contain the current group.

4.5.2 Permissions Manager Startup Page

This section shows the Permissions Manager startup page. See Figure 54.

Figure 57 Permissions Manager Startup



Assigning Permissions Options

The Permissions Manager startup page provides the following options for the general use of permissions in ePortal:

- **Groups Manager**: Not used; to assign permissions to groups, use the Group Manager (see **"Assigning Permissions to Groups" on page 77**).
- **ePortal Channel Subscription**: Allows you to assign permissions by channel subscription; operates in the same way as assigning permissions to groups.
- **ePortal Channel Publication**: Not used.

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

Assigning Permissions to Groups

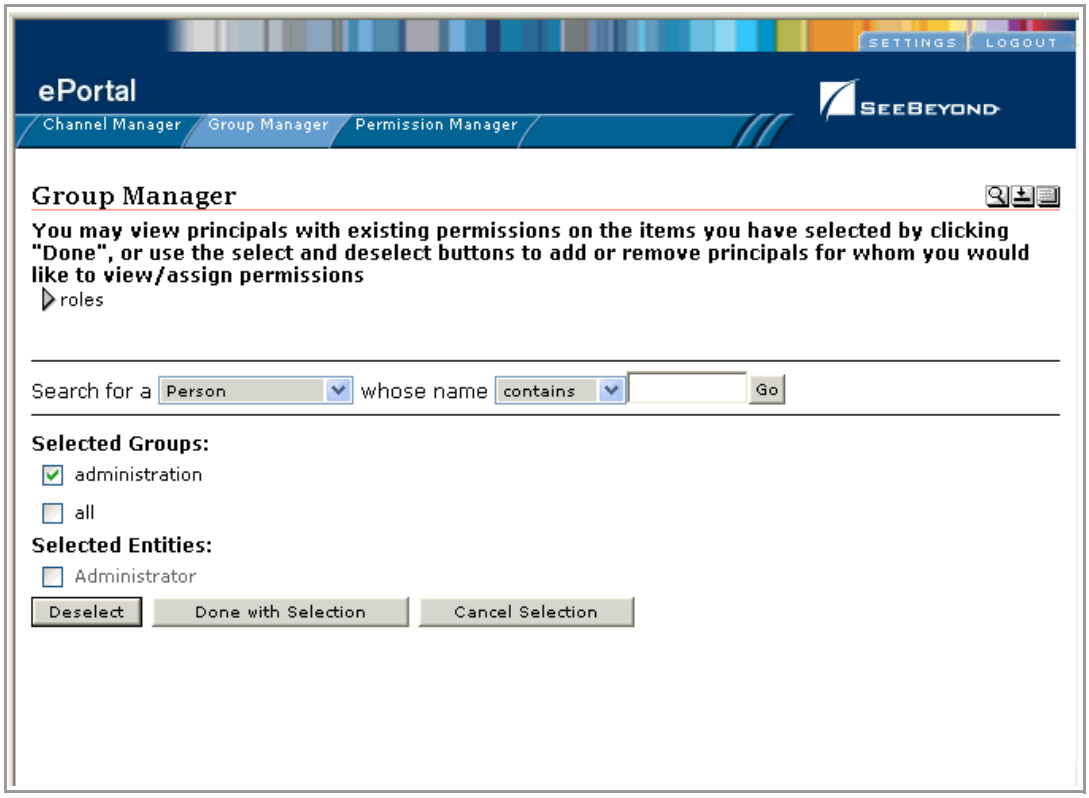
The procedures in this section describes how to assign channel-access permissions to a group.

To Assign Permissions To a Group

1. Start your browser and log in to ePortal.
2. On the Administrator's startup page, click the **Group Manager** tab.
3. In the **Group Manager** page click the expander on the left of an existing group (for example, **administrator**) to expand the list of group members, if necessary.
4. To view the group you want to modify, click the expander on the left of the group's name.

5 In the expanded list, select the member group to which you want to assign permissions. A page appears, allowing you to select groups. See Figure 58.

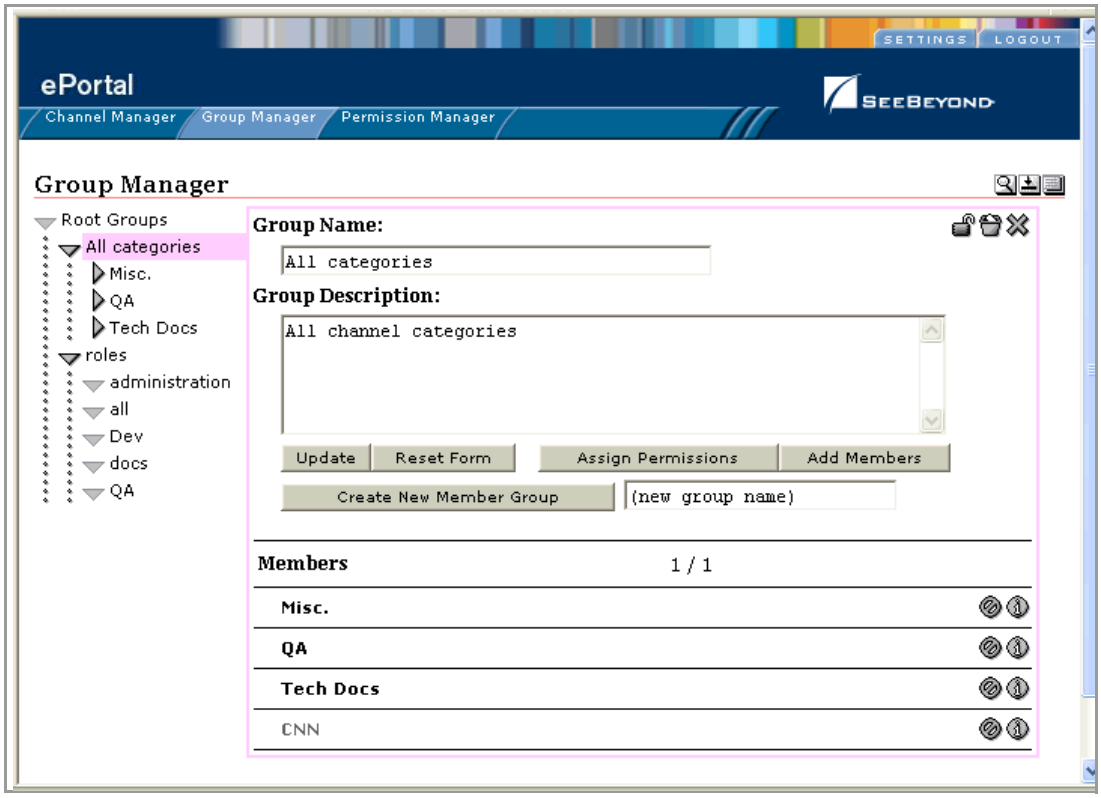
Figure 58 Permissions: Selecting Marked Groups



6 Click **Done with Selection**, then click **All categories**. The Assign Categories box appears. This is the same interface you use to create and modify categories (see **"Managing Categories" on page 72**).

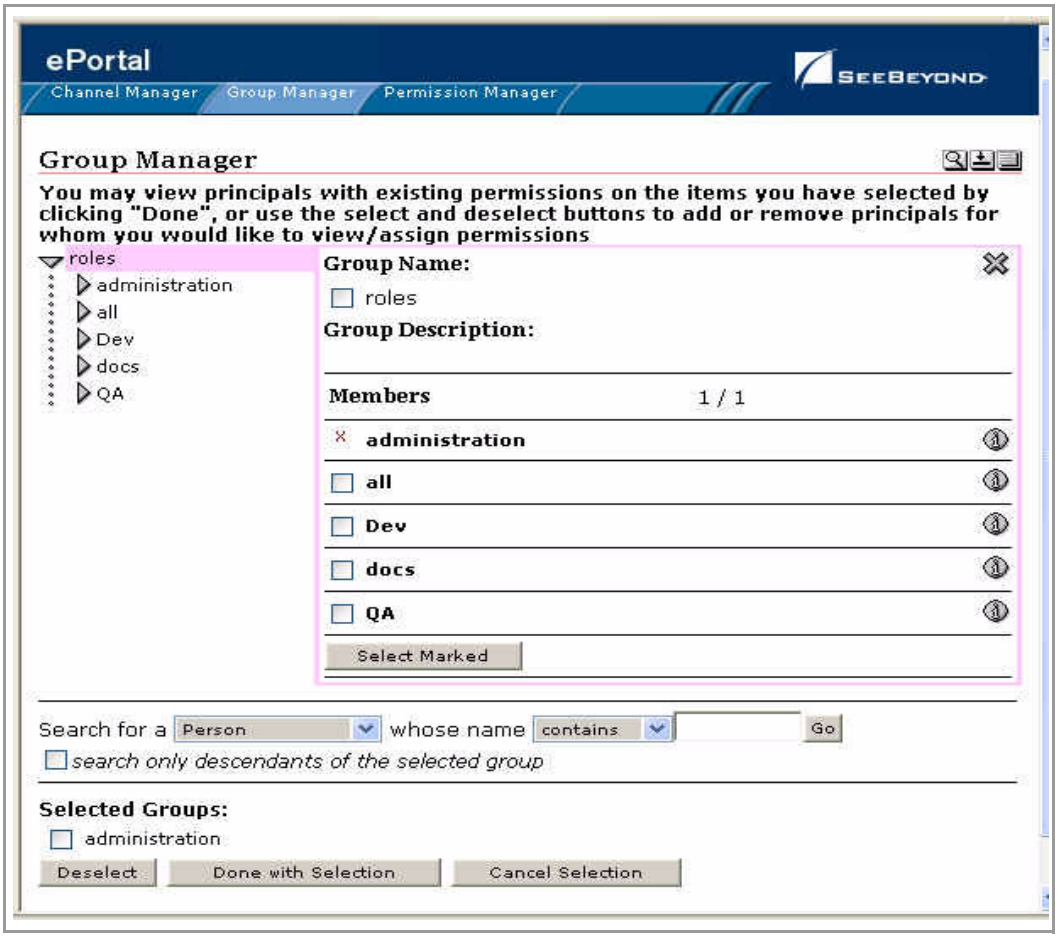
7 Click the **Edit Group** button. A page appears allowing you to assign permissions. See Figure 59.

Figure 59 Permissions: Assigning



8 Click **Assign Permissions**. A box appears allowing you to add permissions. See Figure 60.

Figure 60 Permissions: Adding



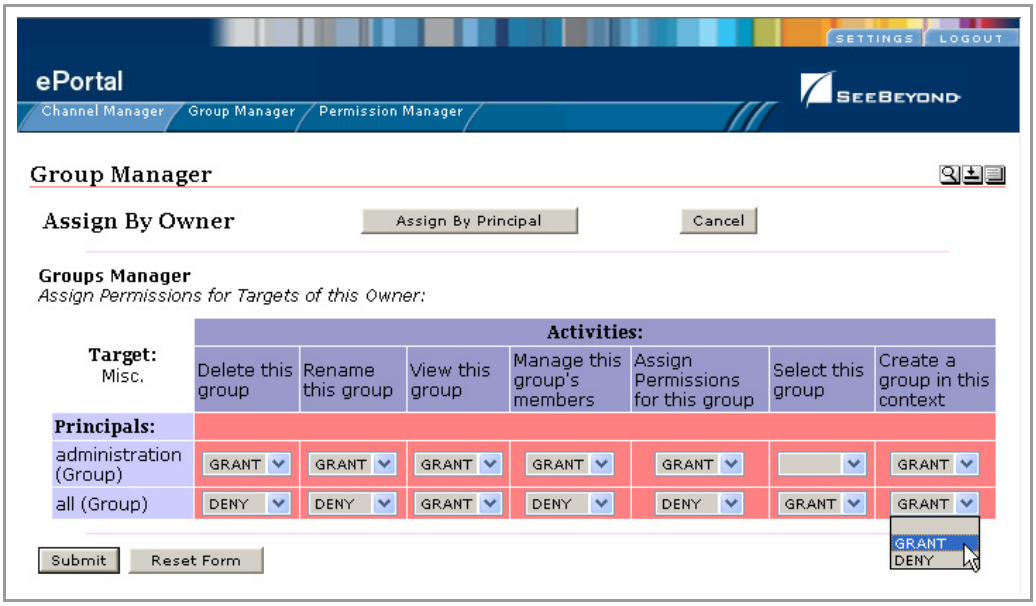
9 Select the check box for the group or group members to which you want to add permissions, then click **Select Marked**. See Figure 60.

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

10 When you are finished, click **Done with Selection**.

A page appears allowing you to grant and deny permissions. See Figure 61.

Figure 61 Permissions: Grant/Deny Switches



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 an interface 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 groups' permissions are defined, click **Submit**.

The permissions are written to the database.

Assigning Permissions to Categories

The procedures in this section describes how to assign channel-access permissions to a category.

To assign permissions to a category

1 Start your browser and log in to ePortal.

1 On the Administrator's startup page, select the **Permission Manager** tab.

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**.

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.

You can grant or deny permission to do the following actions in 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.

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

Chapter 5

User Personalization

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

5.1 Overview

When a new user logs into ePortal prior to personalization, only these options are available: **Settings** and **Logout**. 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.

Settings operations include:

- Adding tabs
- Adding channels
- Adding columns

By default, all users are allowed personalization privileges. However, ePortal system administrators may choose to restrict access to the personalization tools via group management features.

System administrators can also personalize their portal views by clicking **Settings**. They have three additional tab options to work with, **Channel Manager**, **Group Manager**, and **Permissions Manager**. Setting user preferences for these tabs operates in the same way as setting preferences for any tab.

This chapter explains how to use these user personalization features.

This Chapter Includes

- **"Personalizing a View" on page 84**
- **"Using the ePortal Search Engine" on page 89**

5.2 Personalizing a View

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

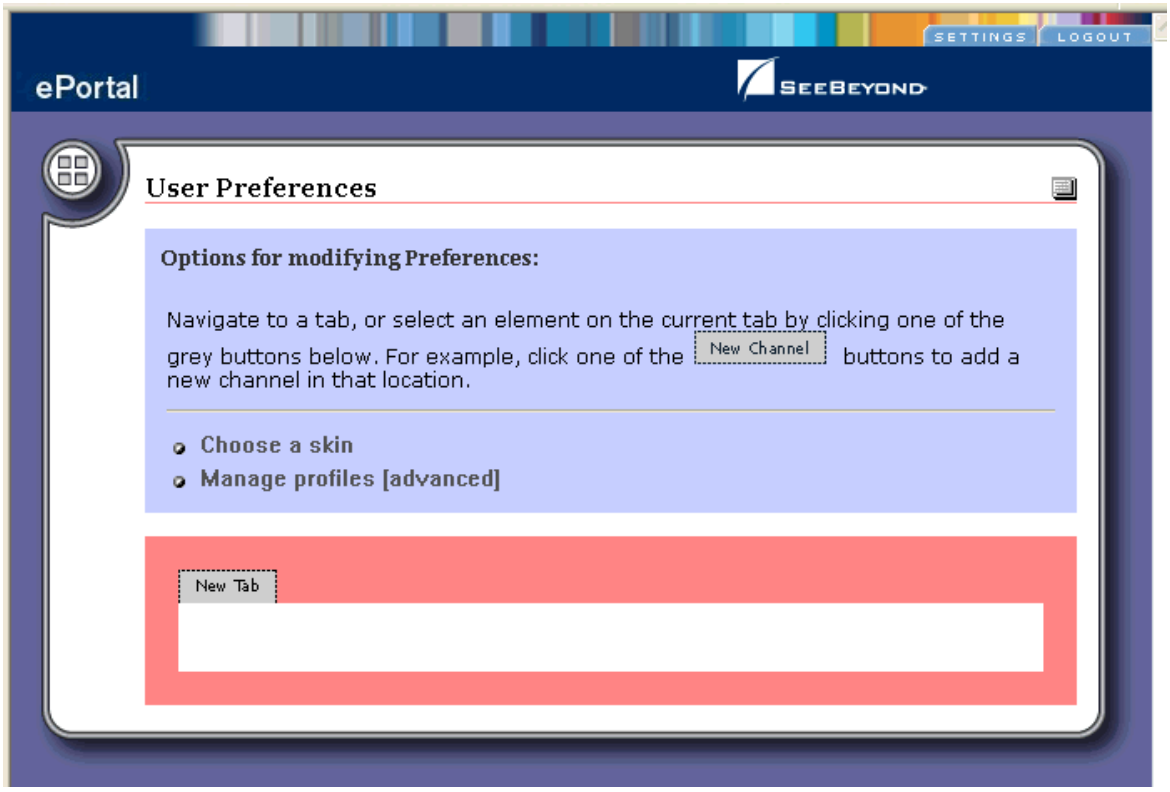
1 Start your browser and log into ePortal.

The user's startup page is displayed in your browser. This page is blank, with only the **Settings** and **Logout** options available.

2 Click **Settings**.

The **User Preferences** page appears. See Figure 62.

Figure 62 User Preferences Page



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

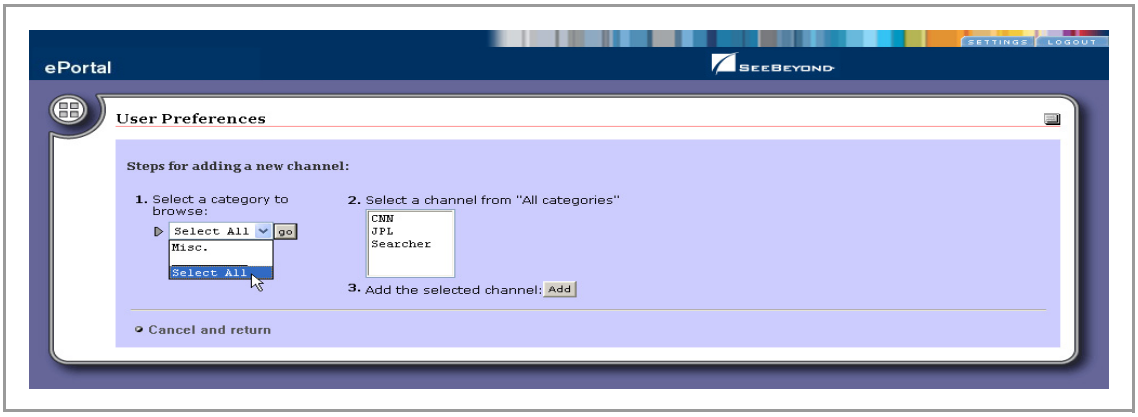
- Add tabs to the view.
- Move tabs in the view.
- Choose a skin.
- Manage your profiles.

5.2.1 Adding a Channel to a View

To add a channel to a view

1 Select the **New Channel** link. See Figure 63.

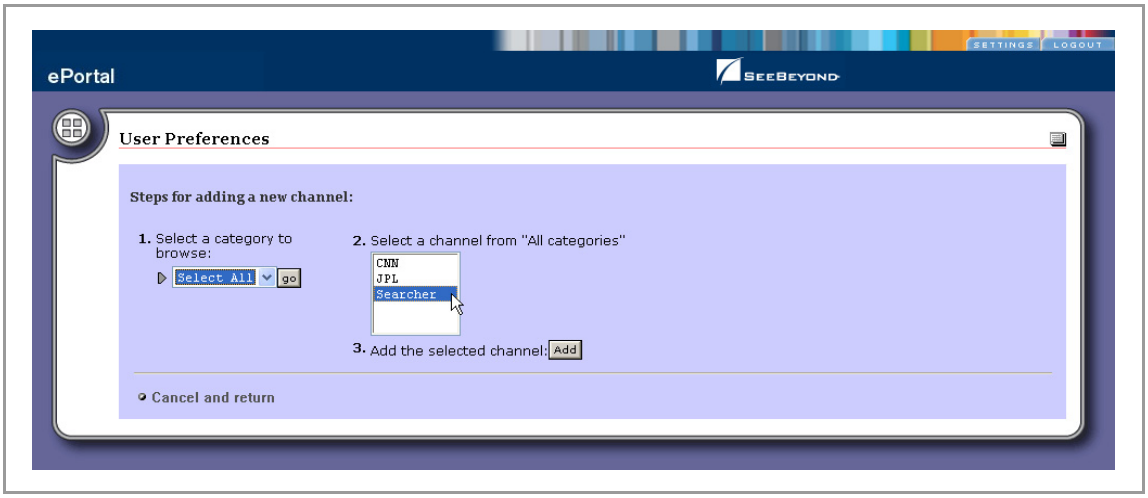
Figure 63 "New Channel "Link



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

A list of channel categories are displayed. See **Figure 64 on page 85**.

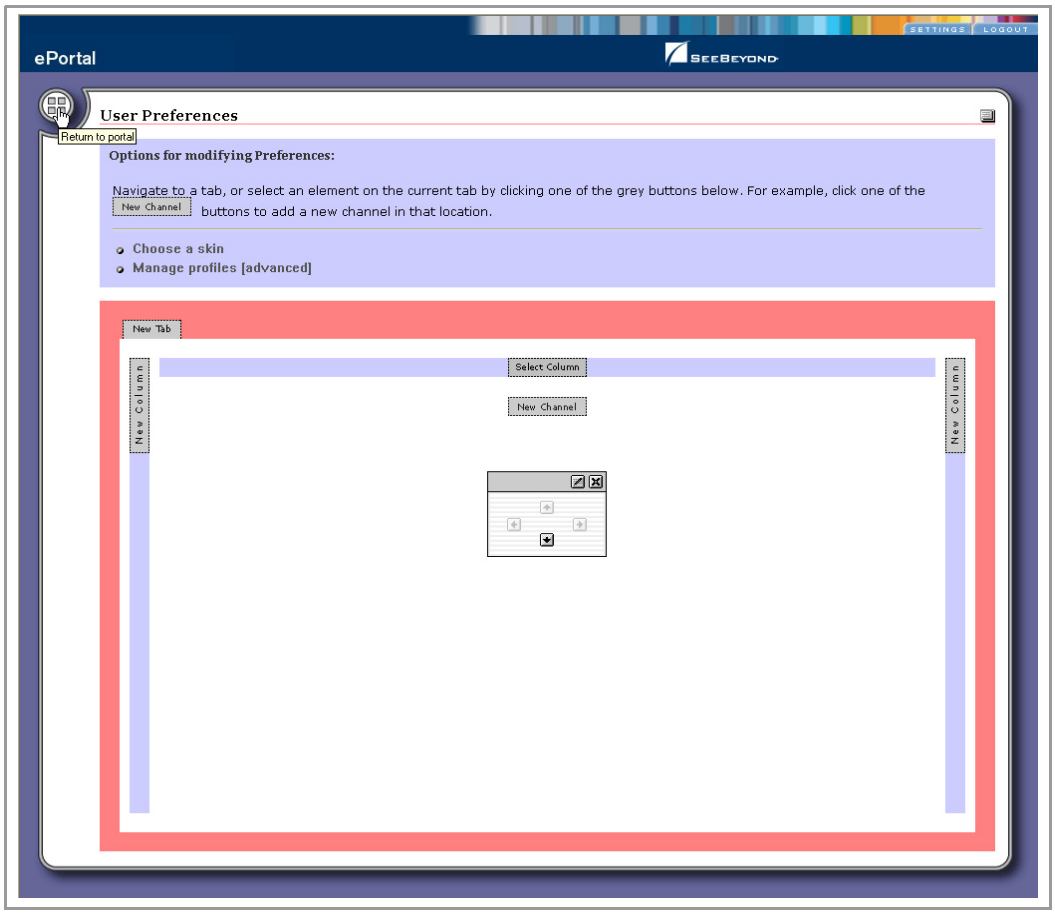
Figure 64 Channel Categories List



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

You can add as many channels as you want. See Figure 65.

Figure 65 Adding Channels



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

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

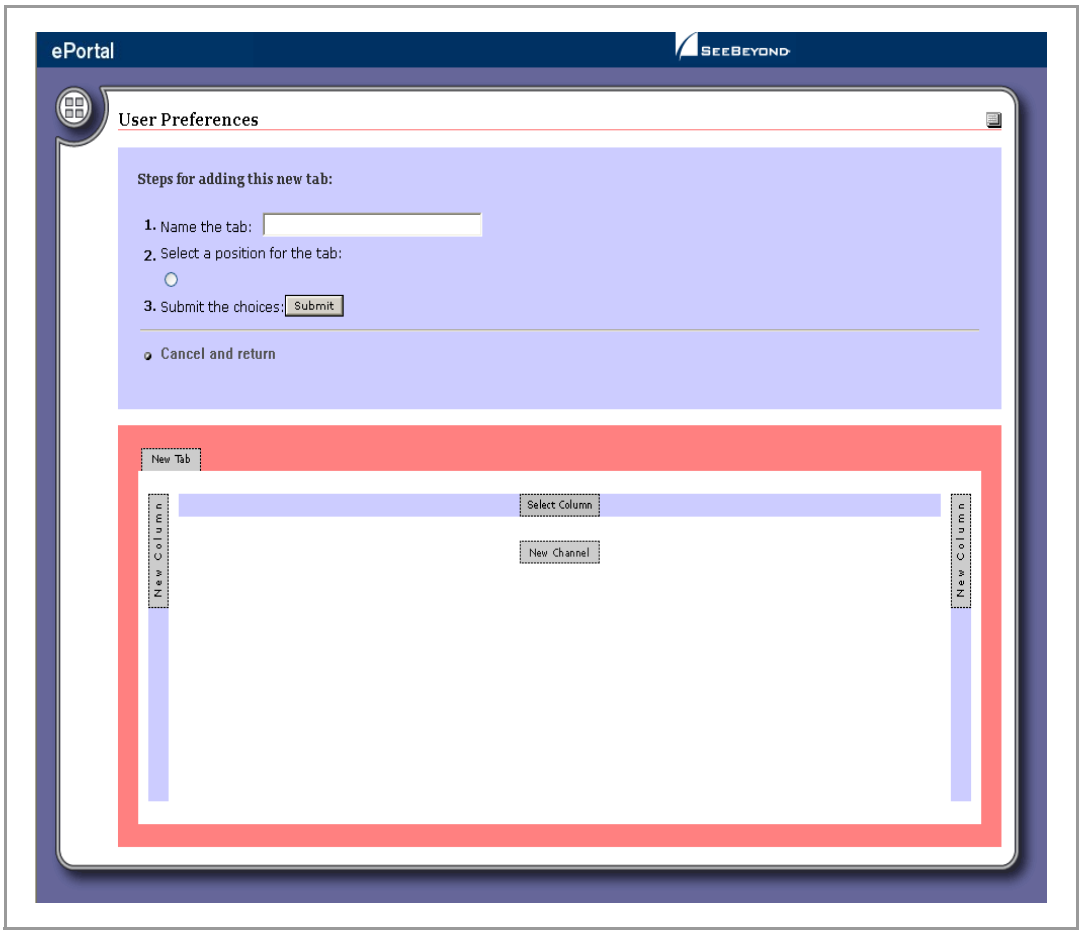
5.2.2 Adding a Tab to a Channel View

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

To add a tab to the channel view

1 To create a tab, on the **User Preferences** page, click **New Tab**. See Figure 66.

Figure 66 Creating a Tab



2 Type a name for the tab.

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

4 Click **Submit**.

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

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

5.2.3 Modifying a Tab

To modify a tab

1 On the **User Preferences** page, select a tab from the row of tabs.

2 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.

3 Click **Submit**.

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

5.2.4 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.

To add a column to a channel view

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 percent of the page.

3 Click **Submit**.

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

5.2.5 Modifying a Column

You can move and resize existing columns.

To modify a column

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

2 Do any of the following actions:

- Specify a width value for the new column.

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

3 Click **Submit**.

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

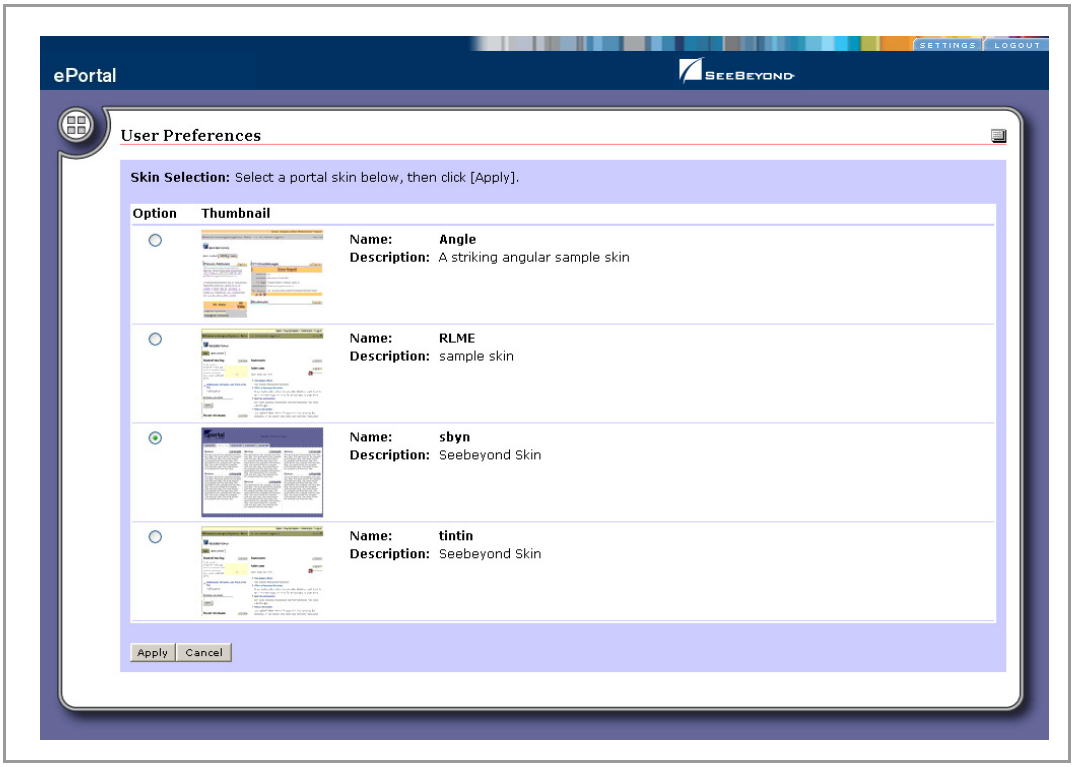
5.2.6 Changing the Skin of a Channel View

ePortal provides an initial set of template Web page skins, that is, page setups. 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 67.

Figure 67 Choosing a Skin



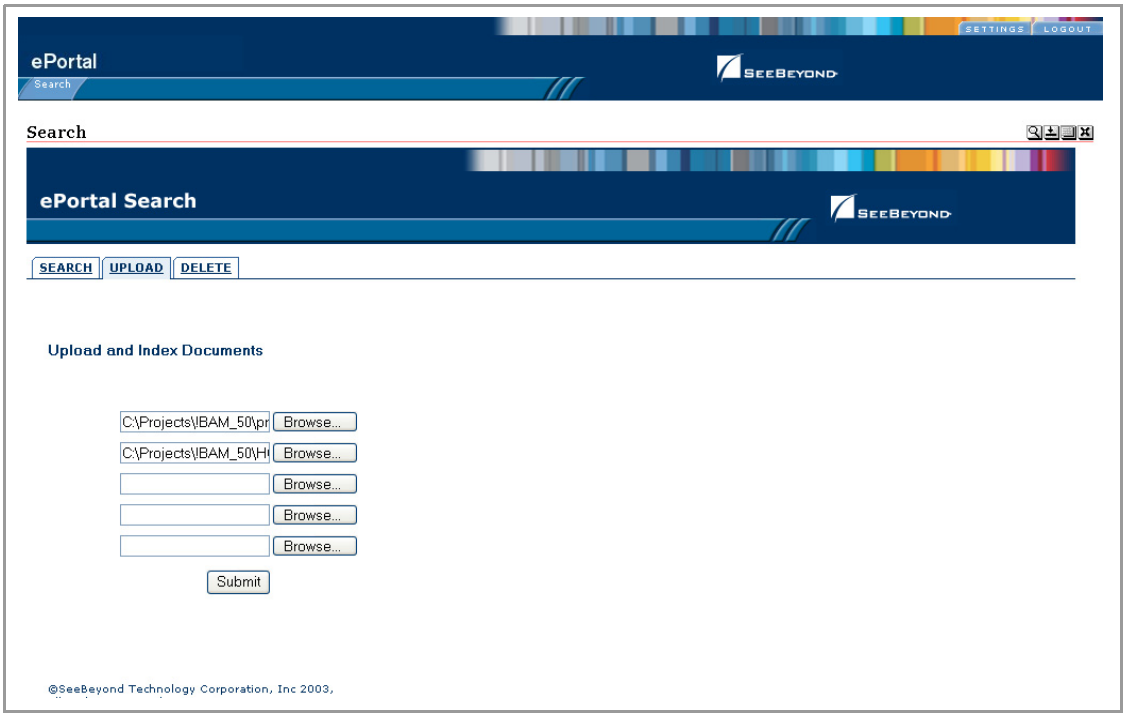
2 To apply the skin, in the **Skin Selection** area, select a skin, then click **Apply**.

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

5.3 Using the ePortal Search Engine

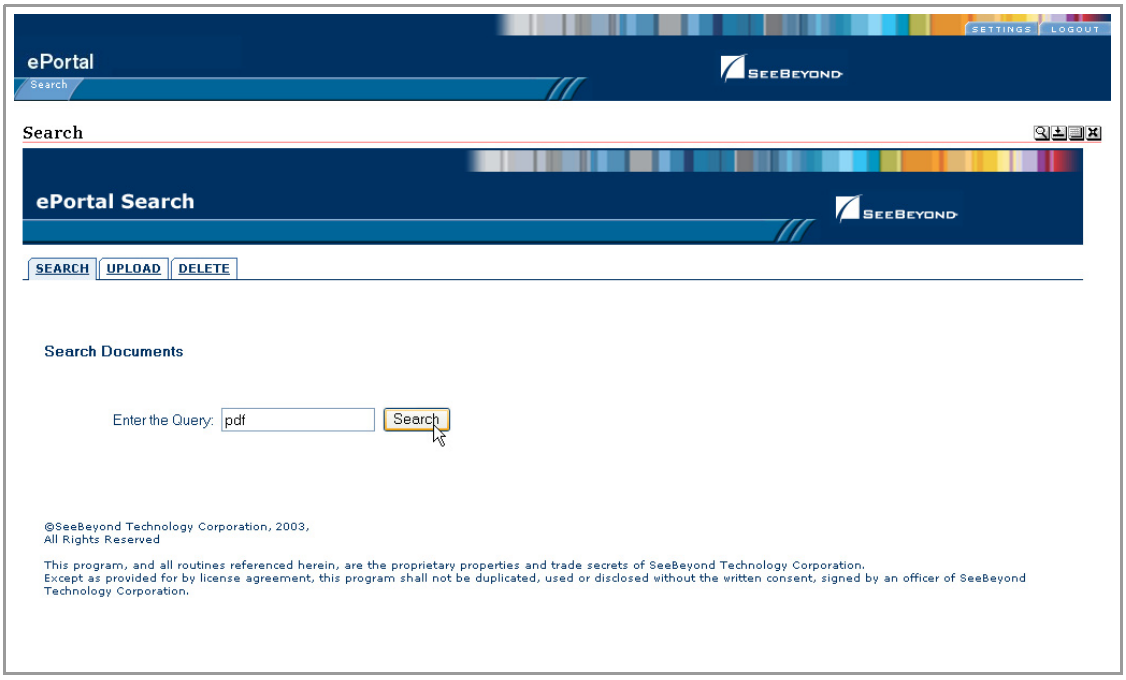
The **ePortal Search Engine** enables you to browse anywhere on your local machine or network, then upload selected files to the Repository. See **Figure 68 on page 90**.

Figure 68 ePortal Composer Search Facility: Upload



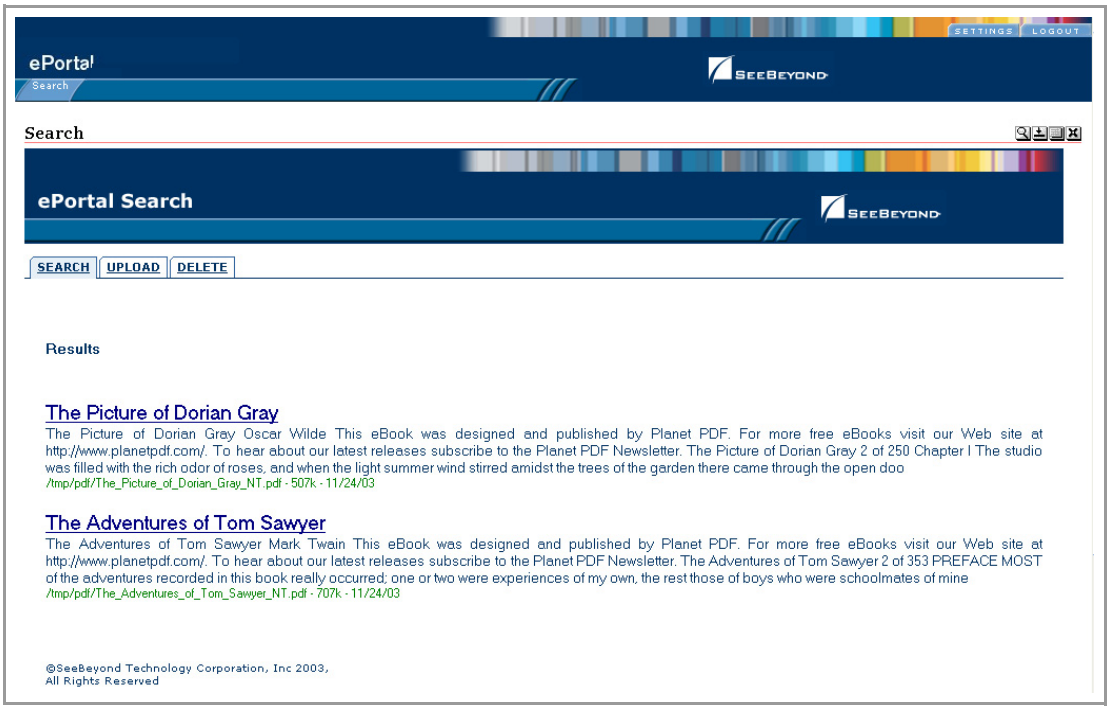
When you have uploaded one or more files to the Repository, you can launch a query. The Search engine will scan the Repository for files that fit the search criteria. A typical example would be submitting a query for all files in the Repository that have a **.pdf** extension. See **Figure 69 on page 91**.

Figure 69 ePortal Composer Search Facility: Query



All files in the Repository that fit the search criteria are displayed on the **Results** page. See Figure 70.

Figure 70 ePortal Composer Search Facility: Query Results



5.3.1 Creating a Layout for the Search Facility

This section describes how to create a layout for the ePortal Search Facility.

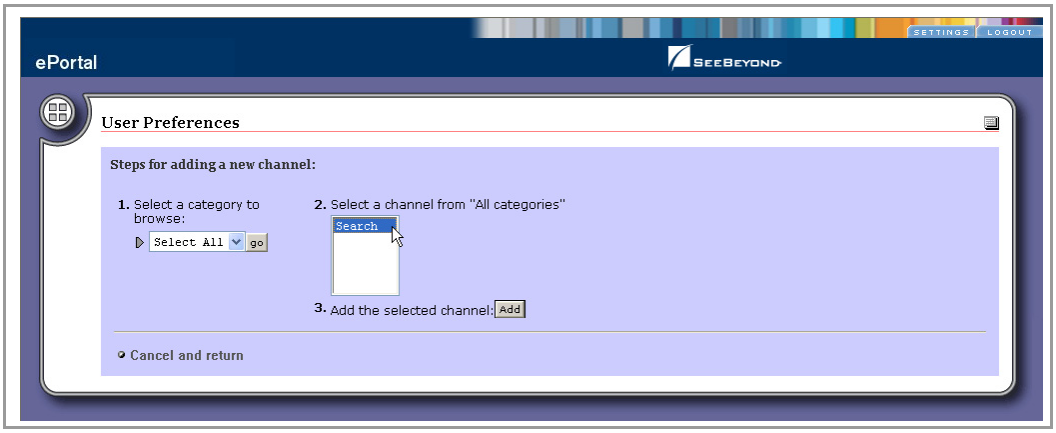
To create a new search layout

1 Start your browser and log into ePortal.

2 To initialize a new ePortal page layout, click **Settings**.

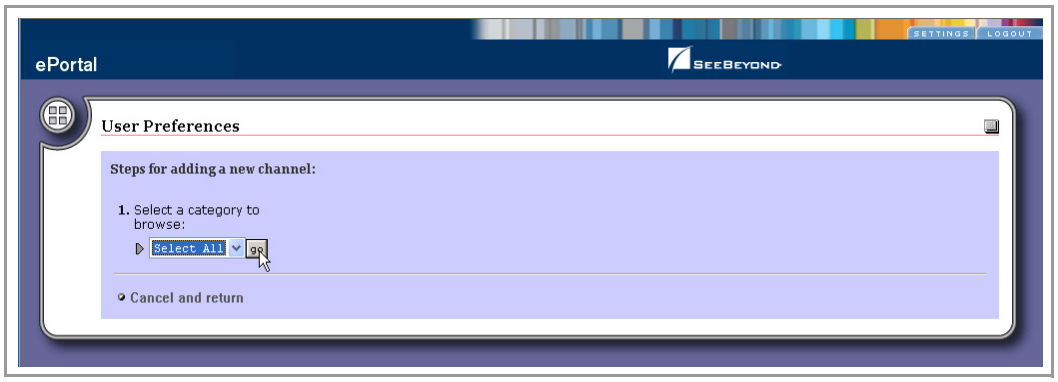
The **User Preferences** startup page for adding a new page layout appears. See Figure 71.

Figure 71 User Preferences: Search: Adding a New Channel



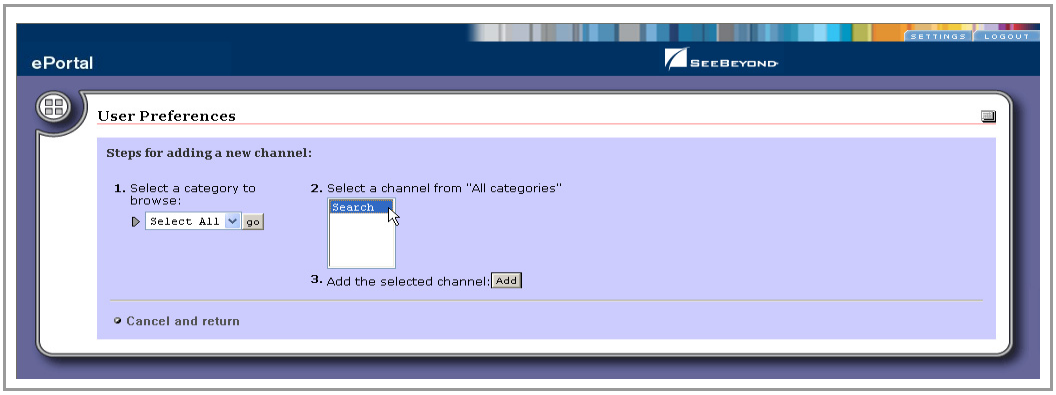
3 On the **User Preferences** page, select a category to browse, then click **Go**. See Figure 72.

Figure 72 User Preferences: Search, Selecting a Category



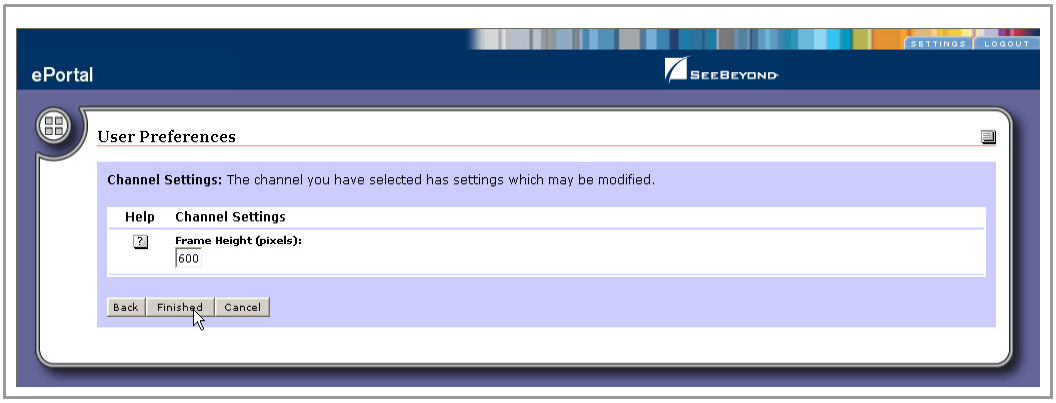
4 On the **User Preferences** page, select a channel from the category, then click **Add**. See Figure 73.

Figure 73 User Preferences: Search, Selecting a Channel



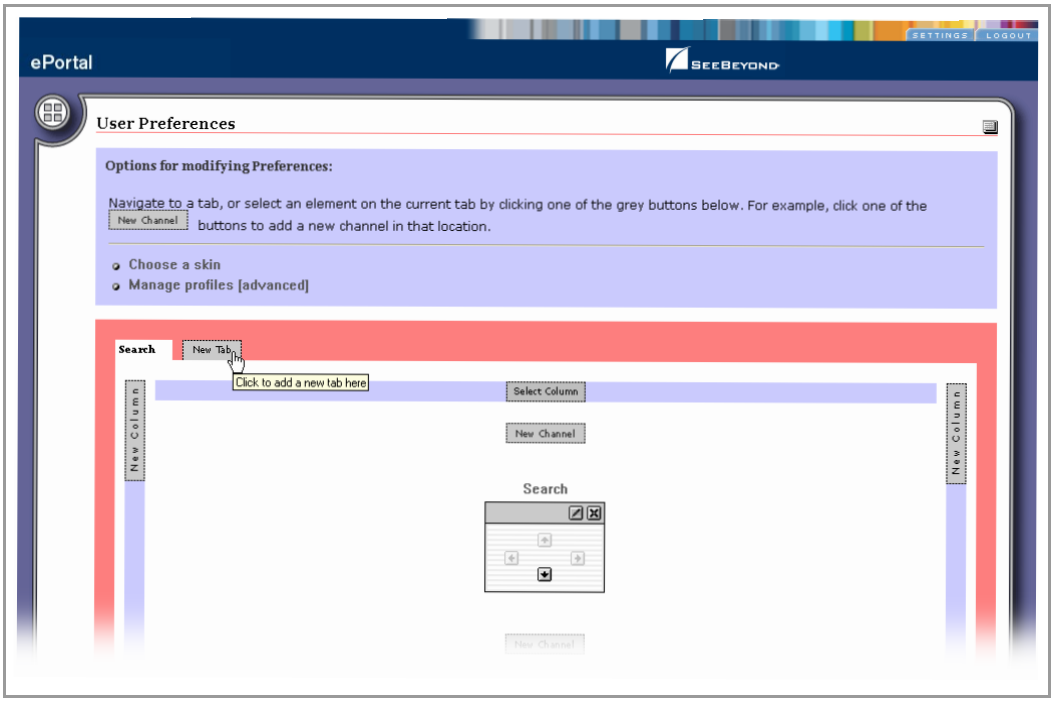
5 On the **User Preferences** page, set the frame height for the Search page layout in pixels, and then click F**inished**. See Figure 74.

Figure 74 User Preferences: Search, Setting the Frame Height



On the **User Preferences** options page, select **New Tab**. See **Figure 75 on page 94**.

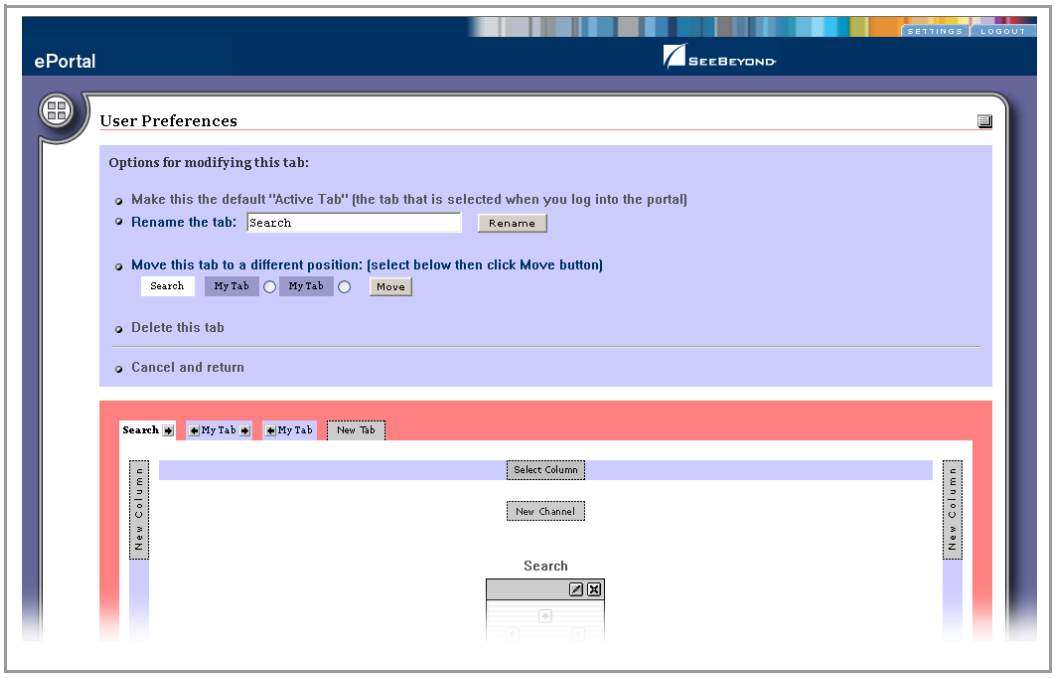
Figure 75 User Preferences: Search, Adding the Search Tab



6 Using the radio buttons on the **Options** page, select the **Search** tab.

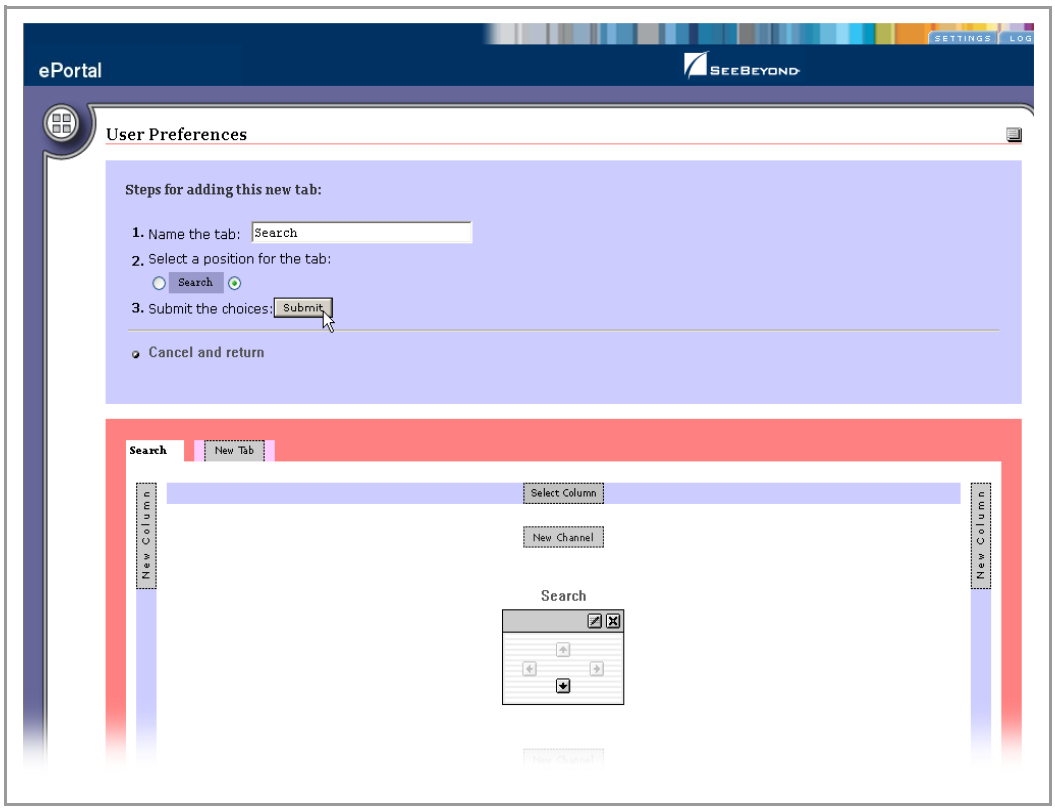
7 Using the placements arrows on the **Search** tab, move the tab to the desired locations, if other than the default. See Figure 76.

Figure 76 User Preferences: Search: Naming and Placing the Search Tab



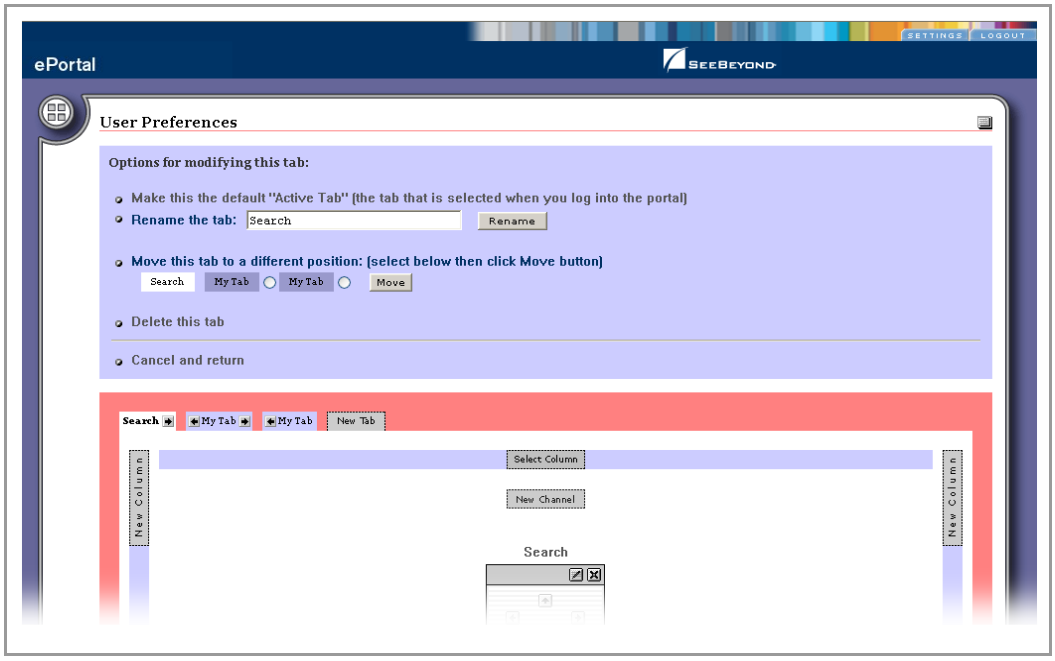
8 To submit the selections and generate the new tab, click **Submit**. See Figure 77.

Figure 77 User Preferences: Search, Defining Search as the Default Tab



The tab layout should look similar to the layout shown in **Figure 78 on page 96**.

Figure 78 User Preferences: Search, Reviewing the Search Page Layout



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