BROADVISION®

BroadVision® Portal™ 8.0

User Guide

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User Guide

Contents

About this book

Portal websites offer users numerous ways to access and arrange information. With a BroadVision Portal site, you can arrange pages to suit your personal taste and information needs as well as those of your coworkers and clients. This book explains how to use and configure a BroadVision Portal site.

Audience

This book provides information for these audiences:

- **Customers** of companies that use BroadVision Portal.
- **Employees** of companies that use BroadVision Portal.

Organization

This book is organized as follows:

- Chapter 1, "Getting started," gets you started with the basic operations of a Portal website.
- Chapter 2, "Personalizing the Site," describes how to alter the appearance of a Portal site to suit your own needs and tastes.
- Chapter 3, "Alerts," describes how to set alerts and receive other communications from a Portal site.
- Chapter 4, "Working with microsites," describes how to create, use, and manage microsites.
- Chapter 5, "Publishing," describes how to publish editorials, advertisements, URLs, and programs on a Portal site.

Typographical conventions

This book incorporates the following typographical conventions:

- Sample code, commands, filenames, and directory names are shown in `monospace font`:

  ```
  /tmp/msgs
  ```

- Variables for which you must provide information are shown in *`italic monospace font`*:

  `http://`*`host`*`:`*`port`*`/bvmc`

- Significant items in code listings are shown in **`bold monospace font`**:

  ```
  <init-param>
      <param-name>serverUrl</param-name>
  ```

- New terms and important words are shown in *italics*.

NOTE: This lead-in calls out helpful information that is related to but distinct from the main topic.

TIP: This lead-in calls out additional details, alternative methods, hints, shortcuts, and related information about the main topic.

IMPORTANT: This lead-in calls out situations that can prevent the system from running and how you can avoid them.

1 Getting started

This chapter will get you started using a BroadVision Portal site.

Useful terms

Area-specific terms are described in their individual chapters, but these general items are useful to know about before reading the rest of this book.

Channel

Channels organize areas of information into navigation hierarchies, and can be either topic-oriented or process-oriented. Channels within channels are sometimes called *subchannels* and have the same qualities as their parent channels.

The term channel is based on a broadcast television metaphor, correlating to networks on a television. To find content on a particular subject or of a particular type, you turn to different channels. Similarly, the channels in a portal are a way of dividing the site into different areas.

Program

Continuing the broadcast television metaphor, *programs* are blocks of information carried by channels. When viewing a channel, you have choices of different programs or of different subchannels with programs of their own. Programs contain articles, documents, or other information.

Content

The term *content* refers to the individual items carried by programs. Content may be made up of articles, documents, images, or other information types.

Block and Column

Blocks and Columns are used to organize information on your home page. Once you have signed into a Portal site, you can change the arrangement of blocks and columns to suit your own needs. All blocks can be moved except the **Search** and **Navigation** blocks, which are always in the first column of the page.

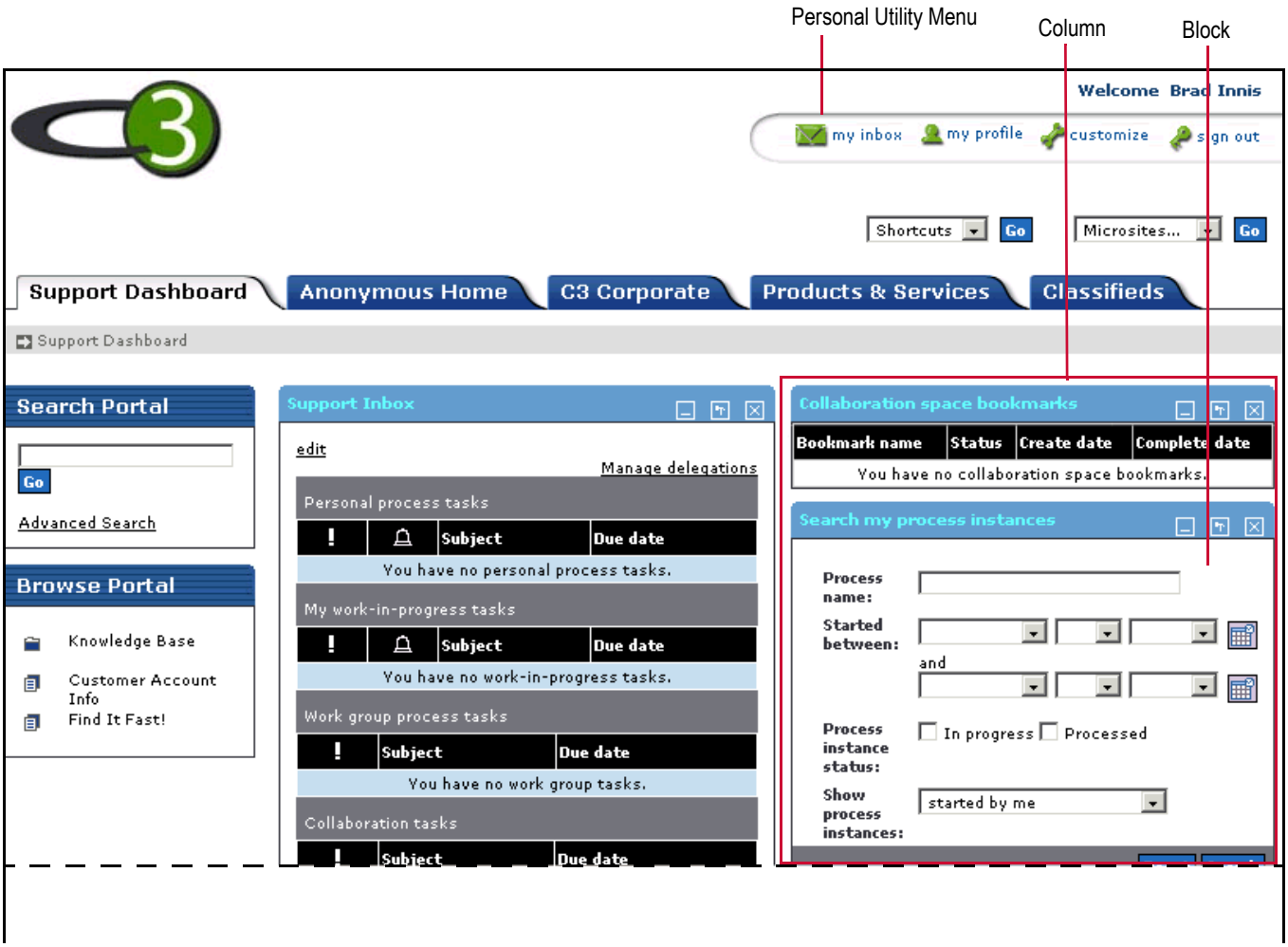
A *block* is a section of information about a particular topic or topics, usually arranged within a graphical box. These blocks are arranged into *columns* on the screen.

Accessing the portal site

Enter the address of your portal site in the location bar of a browser program and press ENTER. If you do not have the address, your web administrator can provide it to you. See the *Portal Installation Guide* to learn more about portal addresses.

Navigating within the site

Most Portal sites have an appearance similar to the C3 sample portal in the picture below. The Portal administrator for your portal may have made changes to the template, but this diagram shows the basic structure. This book describes portal navigation in terms of the C3 foundation application.If your Portal administrator has made significant changes to the appearance of your company portal, some descriptions will not match what you see on your screen.



As with most websites, click the words or images that are linked to the information you want to view in order to navigate around the portal site. The rest of this chapter describes some of the basic operations on a portal site.

Registering with the portal

If your portal administrator has given you a sign-in ID (a username and a password), you do not need to register. If you do not have a sign-in ID, then you need to register before you can use all of the Portal site's functions.

To register with the portal

1. Display the home page of the portal and click **Sign in**, which is in the upper right corner of the page.
2. Click **Register**.

3. Create a username and password, and enter them in the appropriate boxes of the registration form.

4. Enter your first and last names in the appropriate boxes.

   You may enter your email address in the **Email address** box, but this may not be required.

   Click **Submit**.

After completing the registration process, the home page of the site appears.

NOTE: Administrators can change the requirements for registration, so the Portal site you are working with may have other requirements to register a username and password. Be sure to read the instructions on the registration page.

Signing into the portal

To sign in

1. Click **sign in**. It is in the upper right corner of the page.

2. Enter your username and password.

   Optionally, you may check the **remember my sign-in ID** box. to be logged in automatically when you visit the site in the future.

3. Click **Sign in**.

Changing your profile

In the “my profile” area of the portal site, you have three options: Personal Details, Password Settings, and Single Sign-on. These options are described below.

Personal Details

Under Personal Details, you can enter as much or as little information about yourself as you wish. Entering more information is more useful to the company that runs the site and enables them to serve you better.

To change your personal details

1. Sign into the site.

2. Click **my profile**.

3. Select **Personal Details**.

4. Add or change information.

5. Click **Save**.

Password Settings

Changing your password regularly is a good practice.

To change your password

1. Sign into the site.
2. Click **my profile**.
3. Select **Password Settings** from the **My Profile** Menu.
4. Fill in the form with your old password and the password you want to change it to.
5. Click **Save**.

Setting up single sign-on

Administrators can configure a portal site to include access to other websites that have a separate authentication (sign-on and password) barrier. BroadVision Portal includes single sign-on, a feature that allows you to access other sites seamlessly from the portal site. This feature facilitates the aggregation of the many websites that an enterprise might have.

You can sign in to the portal site and configure your profile to include the sign-in IDs you use for other sites. Portal uses the single sign-on information in your profile to provide access to remote websites without you having to enter your sign-in IDs for those sites. Portal administrators define the sites that visitors can configure for single sign-on access.

To set up a single sign-on profile

1. Sign into the portal site.
2. Click **my profile**.
3. Select **Single sign-on** from the **My Profile** menu.
4. Click **Create new**.
5. Choose one of the sites from the drop-down menu.
6. Enter the site name you wish to be displayed on the Single sign-on page in the **Site name** box.
7. Enter your sign-in ID and password in the appropriate boxes.
8. Confirm your password.
9. Click **Save**.

To edit a single sign-on profile

1. Sign into the portal site.
2. Click **my profile**.

3. Select **Single sign-on** from the **My Profile** menu.
4. Click **Edit** for the single sign-on profile you wish to change.
5. Change the name, sign-in ID, or password.
6. Click **Save**.

2 Personalizing the Site

Read this chapter to learn how to change the site so it is more efficient and aesthetically pleasing for you.

Customizing the portal

Portal sites allow a great deal of customization if your site administrator has granted you customizing privileges. You may have some or all of the following customization options enabled. Click **customize** in the upper right corner of the site to get started.

Customizing page content

The Customize Content page allows you to specify which kinds of content are displayed on your home page when you log in.

To customize home page content

1. Sign into the site.
2. Click **customize**.
   The Customize Page Blocks page appears.
3. Put checkmarks in the boxes which correspond to blocks you want to see displayed.
4. Uncheck boxes for blocks you do not want to see displayed.
5. Click **Save**.

You can reset to the default content settings by clicking **Reset to default**.

Customizing the page layout

The **Customize Layout** page allows you to change the columns in which content blocks appear.

To customize layout

1. Sign into the site.
2. Click **Customize**.
3. Click **Layout**.
4. To move a block, highlight it by clicking on it and click on the arrow button that points toward the column you wish to move it into.
5. To move a block more than one column over, move it one column at a time.
6. Click **Save**.

You can reset to the default layout by clicking **Reset to default**.

Customizing the colors

Portal sites allow for a wide range of color options.

To change the color scheme

1. Select the item whose color you wish to change.
2. Hover the mouse over the colors and look at the example boxes to see how they look.
3. To lock a color, click on it.
4. When you are satisfied with all the colors, click **Save**.

You can reset to the default colors by clicking **Reset to default**.

Customizing the tabs

The Customize Tabs page allows you to change the arrangement of tabs in your view of the portal site.

To customize tab display

1. Sign into the site.
2. Click **Customize**.
3. Click **Tabs**.
4. Move tabs between the **Selected tabs** menu and the **Available tabs** menu by clicking on a tab name and then clicking the appropriate arrow button.

   Tabs with an asterisk next to their name cannot be removed from the **Current tabs** menu.
5. When you are satisfied with your selections, click **Save**.

You can reset to the default tab settings by clicking **Reset to default**.

NOTE: Whichever tab you set as your home will be the page you view after signing in to the portal. To set a particular tab as your home, click on it, then click **Set page as home**.

Configuring blocks and topics

The blocks on your home page can be heavily customized, both in terms of what blocks are displayed and what is displayed in them.

To configure a block on your home page

1. Sign into the portal site.
2. Click the **Configure** icon in the upper right corner of the block you wish to configure.
3. The Select Programs page appears. Move programs between the **Displayed Programs** list and the **Available Programs** list by clicking the program name and then clicking the appropriate arrow button to move it.
4. Click **Save**.

To change the number of items per program

1. Sign into the portal site.
2. Click the **Configure** icon in the upper right corner of the block you wish to configure.
3. Select **Items per Program from the Configure Block menu.**

   The Items per Program page appears.
4. Specify the number of icontent tems to display for each program.
5. sClick **Save**.

Setting shortcuts

Another useful way to customize the portal site is with shortcuts. *Shortcuts* are similar to bookmarks in that they allow you to quickly access pages in any area of the site using a simple menu.

To add a channel, program, or content item to your collection of shortcuts

1. While viewing the channel, program, or content item, click **Add Shortcut** in the upper right hand corner of the block or page.

To access a shortcut

1. Sign into the portal site.

2. Select a type of shortcut from the **shortcut drop-down menu** and click **Go**.
   A list of shortcuts appears.

3. Click the link for a shortcut to view that channel, program, or content item.

3 Alerts

Alerts and email messages

A Portal site facilitates communication between users in two ways: alerts and email messages. *Alerts* are automated messages sent by the site to users who have registered to receive them. These alerts can inform the user about a variety of events, from a particular stock reaching a particular price to a new article about health care being published on the site.

Email messages are sent by Portal administrators to users of a portal site, as announcements and marketing tools. Some portal sites offer users the option of choosing not to receive email messages.

Setting up and editing alerts

When navigating a portal site, users see alert-related links on both channel and program pages near the top of the window.

If you are viewing a program or channel for which you have set an alert, you see a **Remove Alert** button. If you have not selected to be alerted about the program or channel, you see a **Set Alert** button.

Alerts can be sent to you by email, or you can elect to receive them only in your alerts inbox on the portal site. To choose which option you prefer, go to your profile and click **Personal Details.** There, you can update your email address and select whether to receive alerts by email by checking or unchecking the box for **Receive email alerts**.

To set an alert

1. Navigate to the program or channel for which you want to set an alert.
2. Click the **Set alert** button next to the program or channel.

The Alerts Inbox

If you have set up alerts to notify you of changes to the portal site, those alerts will be delivered to you either through email or in your alerts inbox on the portal site.

To check your alerts inbox

1. Sign into the portal site.
2. Click **My Inbox** in the upper right-hand corner of the page.
3. Choose a type of alert to view.
4. Click the title of any alert to display its content.

4 Working with microsites

What is a microsite?

Microsites are private areas of a portal website that are created, administered, and used by visitors. A microsite might be created to share information, facilitate tasks, or enhance project collaboration. Microsites can be created only by visitors who have been given microsite creation privileges by the portal administrator and can be accessed only by visitors who have been invited to participate by the microsite creator.

The two types of microsite offered to Portal users are Projects and Communities. *Project microsites* facilitate or enhance collaboration on a project and include phases of the project. *Community microsites* facilitate information sharing, and do not include phases.

Microsites are similar, but not identical, to collaboration spaces. *Collaboration spaces* are found in websites that use the BroadVision Process add-on. For more information, see the *BroadVision Process User Guide*.

Setting up a microsite

You must be signed into the portal and have the correct permissions in order to create a microsite. Permissions are set by portal administrators. If you are not sure whether you have permission to create microsites or if you want to have that permission granted, see your portal administrator.

To create a new microsite

1. Decide on the kind of microsite to create (Community or Project).
2. Using the **Microsites** drop-down menu on your home page, go to the index of the type of microsite you wish to create.

   Select **Communities** or **Projects** and then click **Go**.
3. Click **Create new** .
   This starts the microsite creation wizard.
4. Enter the basic details for your microsite on the Step 1 page.

   You must enter at least a name, but it is also advisable to enter a URL link name. The URL link name will be used to create a permanent address for your microsite.

5. Click **Next**.

6. Enter phases for your microsite on the Step 2 page.

   If you are creating a Community microsite, this step does not appear, and you go straight to the participants step.

7. The Step 3 page (or Step 2 page if you are creating a community microsite) allows you to set participants for your microsite.

   Only the people you add as participants will be able to access the microsite. To add more participants, click **Find more userparticipants** . To set a contact person for the group, check the box in the **Contact** column next to their name.

8. Click **Next**

9. The final page allows you to check all the settings and information for your microsite.

   If you are not satisfied, use either the **Back** button or the **Microsite Menu** on the left side of the wizard screen to go back to the appropriate step and make changes. If you are satisfied with your settings and information, click **Finish**.

10. Click **Finish**.

Your microsite is now ready for use and can be accessed by any participant after they have logged in.

Microsite overview

Microsites allow participants many different ways to share, track, and organize information and interact with each other. Below is a summary of microsite functions.

Microsite Area	Function
Home	Get quick access to commonly-used items.
Overview	View basic microsite information.
Announcements	Read or create announcements.
Checklists	Organize and track tasks.
Discussions	Post and reply to messages for group discussion.
Documents	Share documents with other participants.
Meetings	Plan and announce meetings.
To-do's	Track individual tasks to be completed.
Programs	Follow links to useful programs on the portal site.
Contacts	See the contact people for the microsite..
Participants	View and manage microsite participants.
Groups	Divide microsite participants into access groups..
Phases	Track the phases of a project. (only in Project microsites.)
Summary	View pending tasks, meetings, and checklists.

Using microsites

There are two participant types for a microsite. The *owner* is the participant who created the microsite or who has had ownership assigned to them. *Members* are participants who can access the microsite but who do not have owner privileges.

Common member activities

Create new microsite content

Participants can create new items in any area of a microsite by clicking **Create new** in that area's block on the Home page or at the top of that area's main page.

Edit microsite content

Items that a participant has permission to edit will have an Edit icon under **Actions**. Clicking that icon allows the participant to edit the item. Items that can be edited include tasks, checklists, and documents.

Delete microsite content

Items that a participant has permission to delete will have a trash icon under **Actions** for that item. Clicking the trash can deletes the item.

Notify

Meetings include a Notify icon under **Actions**. Click this icon to open the Notify wizard, which lets participants send notifications about a meeting to other paticipants.

Set read access groups on microsite content

Some items, such as announcements or meetings, can be limited to certain participant groups. When creating a new document or other item, participants are asked to set read access groups for the item. If **Public** is selected from the menu, the item will be visible to all participants in the microsite. If one or more of the other groups listed are chosen, the item will be visible only to participants in those groups, and will not appear on the microsite for other participant groups.

Common owner activities

Create microsite discussion groups

Microsite owners have the ability to create discussion groups in the Discussions area.

To create a new discussion group

1. Sign into the portal site.
2. Use the microsites menu on the Home page to access the microsite you wish to edit.
3. Click **Create new** in the Discussions block.
4. On the Create new discussion page, choose a name for the new group and select the participant groups that may view and post in it.
5. Click **Save**.

Moderate discussions

Microsite owners can moderate Discussions by deactivating certain posts. To deactivate a post so that it no longer appears to microsite participants, click the **activate** icon. When the circle is white, the discussion is inactive. When it is black, the discussion is active.

Update microsite participants

Owners can add, edit, or delete participants on the Participants page of the microsite.

Update microsite groups

Owners can add, edit, or delete groups on the Groups page of the microsite.

Edit or close microsite

Owners can edit the microsite's details from the Overview page. To close the microsite, view the Summary page and click **Close microsite**. In project microsites, the **Close microsite** button remains disabled until the final phase is completed.

Add or delete microsite programs

Owners can add or delete programs on the Programs page.

Update microsite phases

Owners can manage phases from the Phases page.

Tasks

Microsites allow tasks to be assigned to both groups and to individual microsite participants. The microsite can then be used to track a task through to completion.

Using the task inbox

Your Task inbox is a block that appears on your home page and contains links to task instructions. It is available to both microsite owners and microsite members. The nature of the task determines the area of the inbox in which you can find the link. The areas of the task inbox are determined by your site adnimistrator.

Setting task reminders

While you view tasks, you can set task reminders for tasks assigned to you. Task reminders forward alerts to your Alert inbox. Set a task reminder as a relative time (the number of days and number of hours before the due date). This alert lets you know that you need to complete the task. You can change the date of a task reminder as often as you like. You cannot set reminders for tasks assigned to a group to which you belong..

In the Task inbox, the icon in the bell column indicates whether you have set a reminder message for a task. A colored bell indicates that you have set a reminder message; a black and white bell indicates that you have not.

To set a reminder message

1. In the Task inbox, click the bell icon for the task for which you want to set the reminder to display the Task reminder detail page.
2. If necessary, change the date that the reminder message will be forwarded to your Alert inbox.
3. Click **Set reminder**.

Delegating tasks

If you are unable to handle new tasks, you can delegate your future tasks to another participant. For example, if you are going to be on vacation for a week, you can set up a delegation for your new tasks to go to another participant for that week. You cannot delegate your collaboration tasks.

A task delegation is in effect for a time period that you specify. If a delegation is not yet in effect, you can change or delete it. If a delegation is in effect, you can stop it or change the end date. Though you can change a delegation that is in effect, you cannot change its start date or the participant to whom to delegate your tasks. When the time period for a delegation passes, the delegation is automatically deleted.

Portal administrators can use the BroadVision Management Center to delegate your future process tasks to another participant. They can also reassign the tasks that currently appear in your task inbox to one or more participants. Task reassignment deletes tasks from your task inbox and adds them to the inbox of another participant. For more information about task reassignment, see the *BroadvVision Portal Administrator Guide*.

To delegate your tasks to another participant

1. In the Task inbox, click **Manage delegations** to display the My Delegations page with your delegations to others and the delegations from others to you.

2. Click **Add new delegation**.

   The Add New Delegation page appears. An asterisk (*) indicates a field that must have data.

3. Fill in the fields and click **Save**.

To change a task delegation

1. In the Task inbox, click **Manage delegations** to display the My Delegations page with your delegations to others and the delegations from others to you.

2. For your delegations to others, click the **Edit** action button for the participant.

   The Edit Delegation page appears.

   - If the delegation is not yet in effect, you can change the start date of the delegation.
   - You can change the end date of the delegation.
   - You can change the reason for the delegation.
   - If the delegation is not yet in effect, you can change the participant to whom to delegate your tasks.

To stop or delete a task delegation

1. In the Task inbox, click **Manage delegations** to display the My Delegations page with your delegations to others and delegations from others to you.

2. For your delegations to others, click the **Stop** or the **Delete** action button for the participant.

   A message appears asking whether you are sure that you want to stop or delete the delegation.

3. Click **OK**.

Performing tasks

After you view a task, you can take action to perform the task work. This action can involve online work such as setting up or closing a collaboration space or entering data into a form. The action can also involve following task instructions, such as investigating an issue. When you finish a task, the task message is automatically deleted from your task inbox.

To perform a task

1. Sign into the portal site.

2. Click on the **task title** in your **Task inbox**.

3. Click **Start Task**.

4. Follow the prompts to complete the task.

5 Publishing

Portal sites support publishing four kinds of content: editorials, advertisements, URLs, and products. This chapter will explain the process for each type.

Note: You must have permission to publish in a given category before you can publish. Consult your Portaladministrator to set up publishing permissions.

Publishing Editorials

If you have permission to publish an editorial in the channel or program you are viewing, you will see a **Publish** link in the upper right corner of the channel or program. Click this link to display the Editorial Publishing Form. Fill in the boxes to publish your editorial.

To publish an editorial

1. Sign into the portal site.
2. Navigate to the channel or program in which you wish to publish.
3. Click **Publish**.
4. On the Editiral Publishing form, enter the data for your editorial.

   The **Content Source** drop-down list offers two options: An editorial from a **DB Column** is entered directly into the **Local Content** text box and stored in the database. An editorial from an **External File** has been written in another program (such as a text editor) and saved as a file on your computer, and must be uploaded using the **File containing the text** box. Click **Browse** to navigate to the file.
5. Click **Save.**
6. On the Select Qualifier Values page, select Topics of Interest, Customer Types, Languages, and Employee Roles associated with your editorial.

   NOTE: Qualifier values determine which visitors will be able to view your editorial. Any qualifier values you select allow visitors with that same qualifier value set to read the editorial.To select more than one qualifer in a box, hold down the Control button on your keyboard while clicking.
7. Click **Save and continue**.

8. On the Add Related Items page, you may add links to related editorials elsewhere on the portal site.

   Enter the path to the article into the box, or click **Browse** to browse through lists of the site content. After each selection, click **Add**.

9. Click **Save** to complete the publishing process.

Publishing Advertisements

If you have permission to publish an advertisement in the program you are viewing, you will see a **Publish** link in the upper right-hand corner of the advertising block.

To publish an advertisement

1. Sign into the portal site.
2. Navigate to an advertisement in the program within which you want to publish.
3. Click **Publish**.
4. On the Advertisement Publishing form, enter the data for your advertisement.
5. Click **Save and continue.**
6. On the Select Qualifier Values page, select topics of interest, customer types, languages, and employee roles associated with your advertisement.

   NOTE: Qualifier values determine which visitors will be able to view your editorial. Any qualifier values you select allow visitors with that same qualifier value set to read the editorial.To select more than one qualifer in a box, hold down the Control button on your keyboard while clicking.

7. Click **Save and finish** to complete the publishing process.

Publishing URLs

If you have permission to publish a URL in the program you are viewing, you will see a **Publish** link in the upper right corner of an existing URL block.

To publish a URL

1. Sign into the portal site.
2. Navigate to an existing URL in the program you wish to publish within.
3. Click **Publish**.
4. On the URL Publishing form, enter the data for your URL.
5. Click **Save and continue.**

6. On the Select Qualifier Values page, select topics of interest, customer types, languages, and employee roles associated with your URL.

   NOTE: Qualifier values determine which visitors will be able to view your editorial. Any qualifier values you select allow visitors with that same qualifier value set to read the editorial.To select more than one qualifer in a box, hold down the Control button on your keyboard while clicking.

7. Click **Save and finish** to complete the publishing process.

Publishing Products

If you have permission to publish a product in the channel or program you are viewing, you will see a **Publish** link in the upper right-hand corner of the advertising block.

To publish a product

1. Sign into the portal site.
2. Navigate to the channel or program in which you want to publish the product.
3. Click **Publish**.
4. On the first page of the form, fill in the product's information. You may include both short and long descriptions, images, and other information.
5. Click **Continue**.
6. On the Select Qualifier Values page, select topics of interest, customer types, languages, and employee roles associated with your URL.

   NOTE: Qualifier values determine which visitors will be able to view your editorial. Any qualifier values you select allow visitors with that same qualifier value set to read the editorial.To select more than one qualifer in a box, hold down the Control button on your keyboard while clicking.

7. Click **Finish**.