



BroadVision®

InfoExchange Portal™

InfoExchange Portal Administrator's Guide

Version 6.0.0

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InfoExchange Portal Administrator's Guide

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1

BroadVision InfoExchange Portal

This document describes the features and administration of BroadVision InfoExchange Portal.

The following topics are discussed in this chapter:

- [“Overview” on page 5](#)
- [“Before you use the Admin Tool” on page 6](#)
- [“Using the InfoExchange Portal Admin Tool” on page 6](#)
- [“Command line utilities and other features” on page 7](#)
- [“Starting the Admin Tool” on page 8](#)
- [“Admin Tool files” on page 9](#)

Overview

BroadVision® InfoExchange Portal™ is an enterprise-class application solution individuals and work groups use over corporate intranets and extranets to interactively capture, publish, and distribute knowledge. This application lets individuals organize information into interactive channels accessible through the Web.

BroadVision InfoExchange Portal also provides functionality to enhance the relationship between a host enterprise, its customers, and its partners.

As part of the organization process, administrators use the Admin Tool to identify the *channels* and *programs* that contain the information, create *accounts* for each visitor, and define the *user templates*, *program types*, *access groups*, *organizations*, and *qualifiers* the system uses to determine which information to present to each visitor.

Once these are in place, you can set up visitor configurable home pages, project collaboration pages, and closed-loop process management.

InfoExchange Portal also comes with command line utilities that enable you to process large quantities of data for administrative tasks.

Before you use the Admin Tool

Programs can either point to or refer to the following sources of content:

- content category
- rules that return a list of contents
- specific content item
- BroadVision content (a URL or script)
- a portlet

These sources must be created before you can create a program or use the Admin Tool.

Therefore, you must execute the following steps in the One-To-One Command Center to set up your environment for the Admin Tool:

1. Create a category in the Matching Rules content type.
You must do this before you create a program type.
2. Create a category.
You must do this before you create a program with a category as its content source.
3. Create a content item.
You must do this before you create a program with a content item as its content source.
4. Create a rule set.
You must do this before you create a program with a rule set as its content source.

Using the InfoExchange Portal Admin Tool


To begin using Admin Tool, see the next section, [“Starting the Admin Tool” on page 8](#).

The steps for using the Admin Tool to present content to visitors are:

1. Create categories to classify content using the One-To-One Command Center.
2. Create content and put content in categories using Publishing Center or Instant Publisher.
3. Create one or more qualifiers as described in [“Administering qualifiers” on page 12](#).
4. Create one or more program types to display the content as described in [“Administering program types” on page 16](#).
5. Register any portlets you want to use as described in [“Administering portlets” on page 18](#).
6. Define channels using the Admin Tool as described in [“Administering channels” on page 28](#).
7. Create one or more programs under a channel to display the content as described in [“Administering programs” on page 44](#).
8. Create one or more page types that identify the configurable home page type for new user accounts as described in [“Administering home page types” on page 69](#).

9. Create one or more blocks in the page type as described in [“Adding blocks” on page 74](#).
10. Create one or more access groups as described in [“Administering access groups” on page 82](#).
11. Create one or more user templates as described in [“Administering user templates” on page 87](#).
Select the channels, programs, and content that appear in the user template’s preset bookmarks.
12. Create one or more organizations as described in [“Administering organizations” on page 102](#).
13. Create user accounts that identify the user templates for the new site visitors as described in [“Administering user accounts” on page 109](#).
14. Set the default user template for the guest user account in the `bv1to1.conf` file.
15. Set up closed-loop processes as described in [“Administering closed-loop process management” on page 165](#).

The end of this document contains descriptions for [“Getting Technical Support.”](#)

 For information about creating the publishing and find forms to use with InfoExchange Portal, see the *Publishing Center Developer’s Guide* and *Instant Publisher Guide*.

Command line utilities and other features

The following sections describe command line utilities used in administering InfoExchange Portal:

- [“The content purge utility” on page 185](#)
- [“The bulk loader utility” on page 186](#)
- [“Qualifier cache utilities” on page 209](#)
- [“Setting qualifiers on content items in a content type” on page 210](#)

You can also change the maximum number of content items with qualifiers stored in the filter cache as described in [“Administering the filter cache” on page 177](#) and enable and configure the home page cache as described in [“Administering the home page cache” on page 179](#).

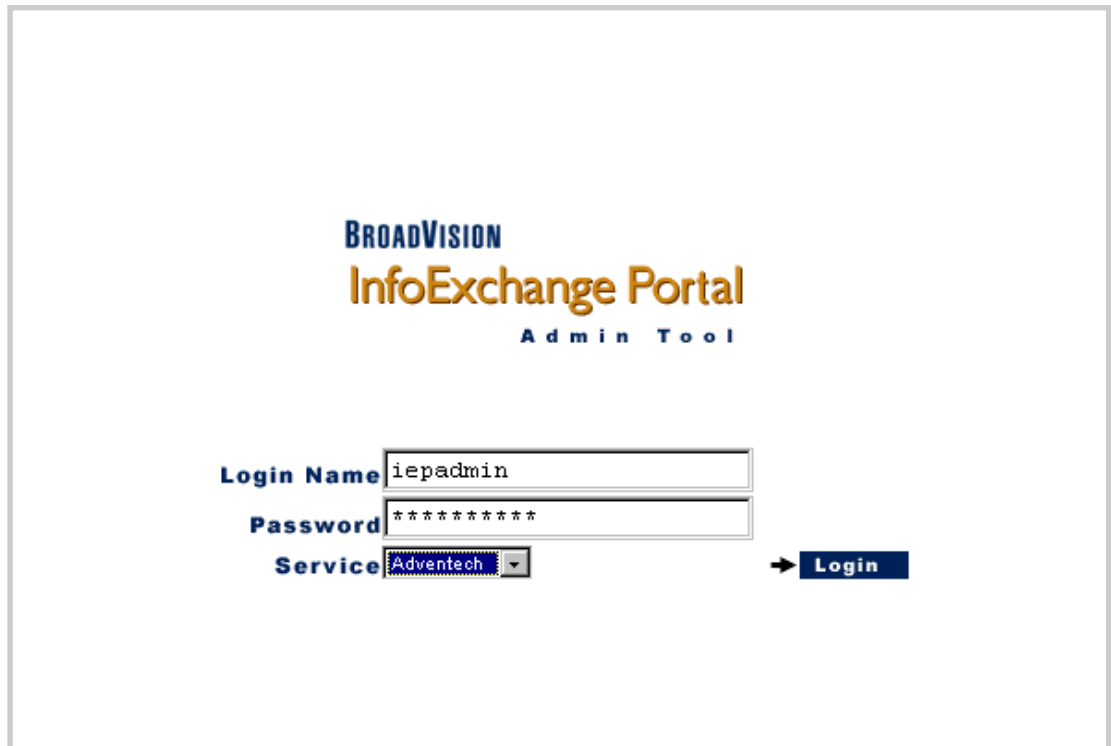
To obtain site information and statistics, you can run reports included with InfoExchange Portal as described in [“Running InfoExchange Portal reports” on page 180](#).

Starting the Admin Tool

Start the InfoExchange Portal Admin Tool loading `iepadmin.html` located in your site's document root directory. For example:

`http://bvsn.com/iepadmin.html`

▶ To use the InfoExchange Portal Admin Tool before any user templates and administrative functions have been defined, use `iepadmin` for the login name, and `imiepadmin` for the password. Using the information in [“Editing a visitor's account” on page 118](#), *immediately* change this password so others cannot use it to log in. This account is a [Site Admin](#) by default.

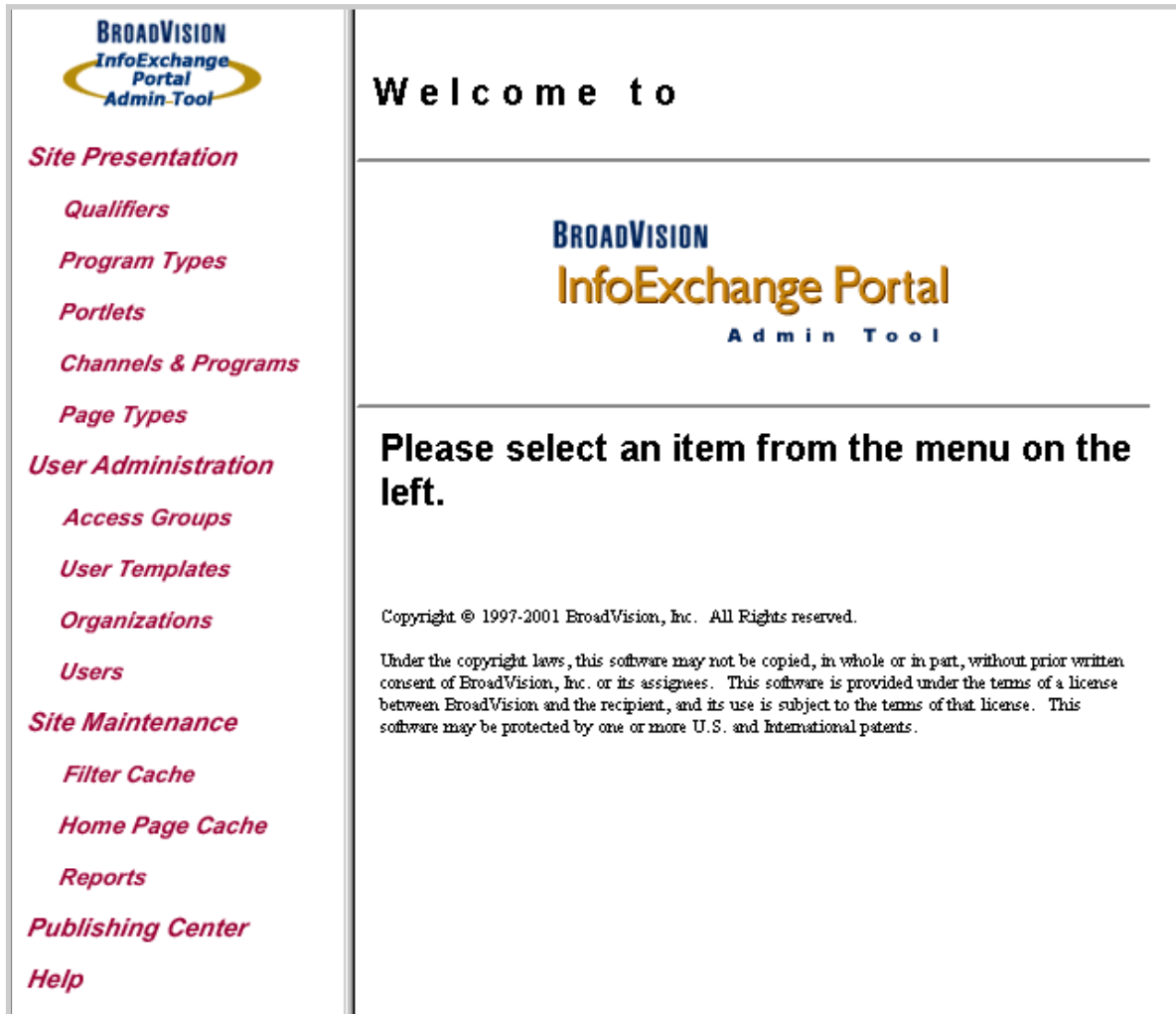


You can also start the Admin Tool by choosing one of the administrator links from an application you create, such as the BVAdventTech example application included with InfoExchange Portal. When you are using InfoExchange Portal, you see only those administrator links to which you have a corresponding administrator function.

To use the Admin Tool you must have either [Site Admin](#) or [Service Admin](#) privileges or be able to administer a specified channel or organization. Visitors with [Site Admin](#) or [Service Admin](#) privileges can perform site presentation, user administration, and site maintenance functions for the specified service; visitors with [Site Admin](#) privileges can administer any service on the site. See [“Editing a visitor's account” on page 118](#) for information about changing a visitor's administrative function.

▶ To find the `iepadmin` account so you can change its password, as a [Site Admin](#), follow the directions in [“Editing a visitor's account” on page 118](#), making sure you search the entire site rather than just the service.

When you successfully log into the InfoExchange Portal Admin Tool, the following welcome screen appears:



Admin Tool files

The Admin Tool scripts and images are located in the following directories:

File	Description
<code>document_root/knowledge/admin/images/...</code>	Admin Tool images
<code>script_root/knowledge/admin/scripts/...</code>	Admin Tool scripts
<code>document_root/erm_app/pubs/...</code>	InfoExchange Portal administration documentation

2

Site Presentation

The InfoExchange Portal site presentation hierarchy describes the site views that can be presented to visitors. This chapter discusses InfoExchange Portal features that control site presentation.


The following topics are discussed in this chapter:

- [“Introduction,”](#) next
- [“Administering qualifiers”](#) on page 12
- [“Administering program types”](#) on page 16
- [“Administering portlets”](#) on page 18
- [“Administering channels”](#) on page 28
- [“Administering programs”](#) on page 44
- [“Administering home page types”](#) on page 69

Introduction

Qualifiers are navigation filters that control the view of channels and programs a visitor can see. Each qualifier can be considered a type of visitor community. Each qualifier value setting for a channel or program potentially decreases its visibility to a visitor. Each qualifier encoding for a user template or user account restricts a visitor’s view. Setting qualifier values for a channel or program is optional.

Channels and *programs* are parts of the InfoExchange Portal navigation hierarchy. Channels define the navigation hierarchy structure; they are high-level, logical groupings of content (programs) organized for the distribution. The Channel Administrator designs and creates the channels with one goal in mind: to distribute the right information quickly and easily to the right people. *Programs* classify one or more content items into meaningful groups. The *program type* for a program determines what type of items are presented.

 You must create at least one program type before you can create any programs.

Portlets are reusable interface components that provide access to web-based resources. Portlets let you customize and extend BroadVision InfoExchange Portal to display and integrate external or legacy data sources that reside outside of the One-To-One Enterprise databases such as SAP, PeopleSoft, and Microsoft Exchange Server. The InfoExchange Portal Admin Tool provides the necessary framework to allow you to easily control and manage the access and display of a portlet.

Access groups determine the kind of access you have, as a group member, to the content items in the categories and subcategories created for an interactive service. A Publishing Center Administrator can create access groups using Publishing Center, or you can create access groups using the Admin

Tool. Using the Admin Tool you can make a visitor a member of one or more groups according to the content items the visitor works with and the kind of access the visitor needs to do his or her work.

Page Types define the appearance of a visitor's home page. You can use the Admin Tool to enable a visitor to change information displayed on the home page.

 You must create at least one page type before you can create a user template.

Administering qualifiers

The InfoExchange Portal [Site Admin](#) or [Service Admin](#) sets qualifier values for each channel, program, and user template. The user template settings are applied to each new site visitor when a user account is created using that user template. Modifications to a user template's qualifiers do not affect existing user accounts created from the same template because each visitor's settings are only associated with that visitor at the time the account is assigned to a user template. The [Site Admin](#) or [Service Admin](#) can override each visitor's qualifier settings at any time.

Each visitor is presented with a view of the channels and programs hierarchy most relevant to him or her. This view is composed on demand by matching the setting of qualifiers for the visitor against the setting for each channel or program as the visitor navigates through the hierarchy.

There are two key tasks for administering qualifiers:


- defining a complete set of qualifiers
- selecting qualifiers for each user template, channel, and program

A visitor can change the settings of some qualifier values in a *Customize* page in an InfoExchange Portal site such as the BVAdventech sample application. The [Site Admin](#) or [Service Admin](#) decides which qualifiers are displayed in the visitor's profile editor.

For a detailed discussion of qualifiers and how they affect the display of channels and programs, see the *InfoExchange Developer's Guide*.

Qualifiers and their values are defined and set by the [Site Admin](#) or [Service Admin](#). Visitors can set some qualifier values in their personal profile. Qualifier settings are optional; when a channel or program has no qualifier values for a particular qualifier, the qualifier is ignored during matching.

A site or service administrator can set the qualifier values that apply to each channel or program. All values that apply may be selected for each qualifier. For example, the Sales Collateral channel might have the English value selected for the qualifier Language, while Events in North America might have both the English and French values set for Language.

 You cannot use the Admin Tool to configure your site so you can set qualifiers on content items in a content type. Instead, you must follow the steps listed in "[Setting qualifiers on content items in a content type](#)" on page 210.

This section contains information about:

- [Adding a qualifier](#)
- [Editing a qualifier](#)
- [Adding a qualifier value](#)
- [Deleting a qualifier](#)

▶ You must have the [Site Admin](#) or [Service Admin](#) administrative function to perform qualifier administration with the Admin Tool.

Click **Qualifiers** in the left frame to view existing qualifiers and add new ones.

Qualifiers	
Qualifier	
	Add Qualifier
[Edit] [Delete]	Account Level
[Edit] [Delete]	Department
[Edit] [Delete]	Industry Type
[Edit] [Delete]	Language
[Edit] [Delete]	Partner Type
[Edit] [Delete]	Region
[Edit] [Delete]	Role

Adding a qualifier

To add a qualifier, click **Add Qualifier**. The Add Qualifier form appears.

The Add Qualifier form determines the following values:

- **Qualifier** is the name of the qualifier.
- **Add Values** enables you to add values separated by a semicolon (;).
- **Allow Visitors to Edit All Values** specifies whether a visitor can modify the values for that qualifier in the visitor's customization profile.

▶ Each visitor can set this qualifier if you choose the **Allow Visitors to Edit All Values** setting

To blank the form, click **Reset**. When you are finished, click **Save** at the bottom of the page to save the new qualifier.

Editing a qualifier

To edit a qualifier, click **Edit** to the left of the qualifier name. The Edit Qualifier form appears.

Value	Editable by Visitor
[Add Value] [Edit] [Delete] Bronze	✓
[Add Value] [Edit] [Delete] Gold	✓
[Add Value] [Edit] [Delete] Platinum	

The Edit Qualifier form lets you change the name of the Qualifier.

To add a qualifier value, see [“Adding a qualifier value,”](#) next; to edit a qualifier value, see [“Editing a qualifier value”](#) on page 15.

Adding a qualifier value

To add a qualifier value, select the **Add Value** link in the Add Qualifier or Edit Qualifier form.

Qualifier	Account Level
Value	Aluminum
Editable by Visitor	<input type="checkbox"/>

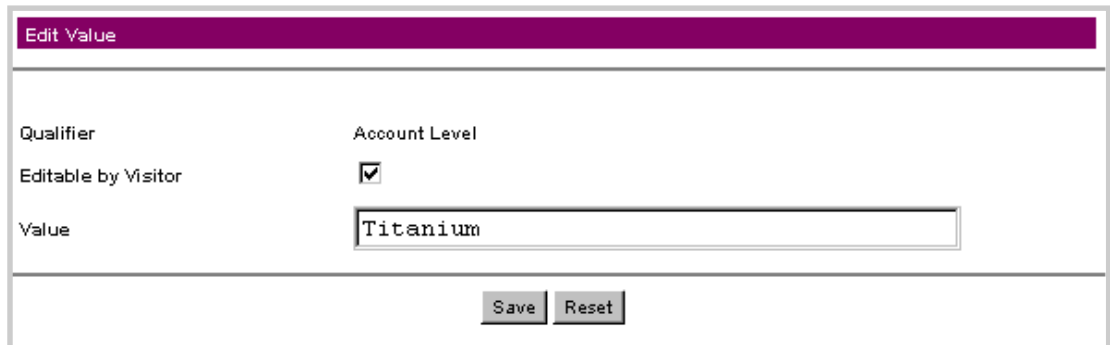
Here you can:

- Add a **Value** for the specified qualifier.
- Enable all visitors to set this qualifier value in their customization profile if you choose **Editable by Visitor**.

To clear the form, click **Reset**. When you are finished, click **Save** at the bottom of the page to save the new qualifier value.

Editing a qualifier value

To edit a qualifier value, select [Edit] to the left of the qualifier value in the Add Qualifier or Edit Qualifier form.



Edit Value	
Qualifier	Account Level
Editable by Visitor	<input checked="" type="checkbox"/>
Value	<input type="text" value="Titanium"/>
<input type="button" value="Save"/> <input type="button" value="Reset"/>	

▶ When you edit a value you are only changing the name displayed in the Admin Tool and not the name used internally for matching.

Here you can change the following values:

- Change the selected Value for the specified qualifier.
- Enable all visitors to set this qualifier value in their customization profile if you choose Editable by Visitor.
- Editable by Visitor Change whether a visitor can modify the values for that qualifier in the visitor's customization profile by selecting or deselecting the Editable by Visitor setting.

To undo your changes, click Reset. When you are finished, click Save at the bottom of the page to save changes made to the qualifier value.

Deleting a qualifier value

To delete a qualifier value, in the Edit Qualifier window click [Delete] to the left of the qualifier value. You are then asked for confirmation before the value is deleted from the list of values for that qualifier. Note that deleted qualifier values cannot be "undeleted."

Deleting a qualifier

In the Qualifiers window, select [Delete] to the left of a qualifier name to delete it; you are then asked for confirmation before the qualifier is deleted. Note that deleted qualifiers cannot be "undeleted."

▶ Deleting a value and deleting a qualifier can affect the visibility of the presentation hierarchy. Because you can delete a qualifier being used by a channel or program, BroadVision recommends you adjust the settings of relevant channels, programs, user templates, and user accounts before you delete a qualifier.

Administering program types

An InfoExchange Portal site presents programs as links that when clicked, display the contents of the program, whether it be a rule set, a category, a content item, a script, a URL, or a portlet. The *program type* defines the type of items presented by a program.

This section contains information about:

- [Adding a program type](#)
- [Editing a program type](#)
- [Deleting a program type](#)

▶ Before you can add a program type, you must use the One-To-One Command Center to create a category of rule sets (the category can be empty).

Click Program Types in the left frame to view the existing program types.

Program Types		
Program Type	Edit	Delete
Add Program Type		
Customer Profiles and Stories	[Edit]	[Delete]
Downloadable Tools	[Edit]	[Delete]
Events, News and Press Releases	[Edit]	[Delete]
Forms	[Edit]	[Delete]
Messages and Memos	[Edit]	[Delete]
Products	[Edit]	[Delete]

Click to add a program type

Click to edit a program type

Click to delete a program type

Adding a program type

To add a program type, click [\[Add Program Type\]](#). The Add Program Type form appears.

Add Program Type

Program Type Name:

Program Content Type:

Rule Set Category:

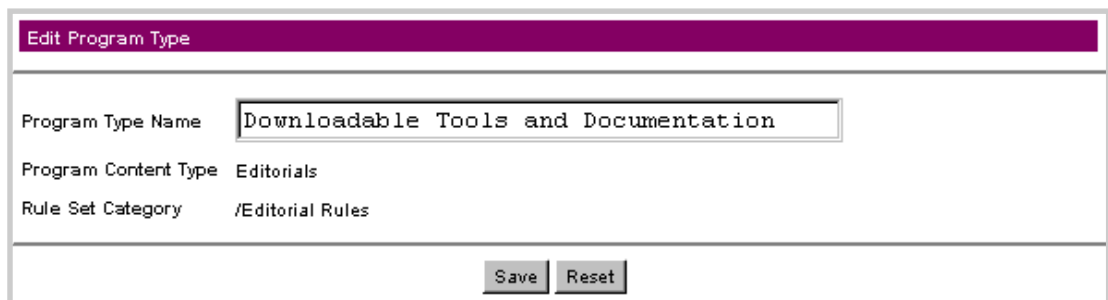
1. Enter the **Program Type Name**. This identifies the program type.
2. Select the **Program Content Type** from the drop-down list. This defines the content type of the content source of programs of that program type. When a program is assigned to a program type, the content source category picker and content source content picker in the program display categories and content of the content type chosen in that program type.

3. Select a **Rule Set Category** from the drop-down list. This defines what rule sets are available as the content source of programs of that program type. When a program is assigned to a program type, the content source rule set picker in the program displays the rule sets located in the category chosen in that program type.
4. To clear the form, click **Reset**. When you are finished, click **Save** at the bottom of the page to save the new program type.

▶ Once you click **Save**, you cannot change the **Program Content Type** or **Rule Set Category** for a program type.

Editing a program type

To edit an existing program type, click **[Edit]** to the left of the program type name.



Edit Program Type	
Program Type Name	Downloadable Tools and Documentation
Program Content Type	Editorials
Rule Set Category	/Editorial Rules
<input type="button" value="Save"/> <input type="button" value="Reset"/>	

The form has the same fields as the **Add Program Type** form, but you can only change the **Program Type Name**.

To undo your changes to the page, click **Reset**. When you are finished, click **Save** at the bottom of the page to save changes.


Deleting a program type

To delete an existing program type description, click **Delete** to the left of the program type name.

A confirmation window appears. Click **OK** to delete the program type.

▶ You cannot delete program types that still have programs using that program type.

Administering portlets


 To perform portlet administration with the Admin Tool, you must have [Site Admin](#) or [Service Admin](#) privileges.

A portlet is a reusable interface component that enables you to expand an InfoExchange Portal site by providing access to web-based resources, such as news, stock quotes, and e-mail. A portlet and its display parameters are defined by the following files:

- an XML registration file (required)
- a block script (required)
- a page script (optional)
- a visitor configuration script (optional)

The block script, page script, and visitor configuration script for a portlet can be written as either JavaScript or Java Server Pages that can be called directly from a BroadVision application page. The scripts must all be the same type of file as defined in the XML registration file (either JavaScript or JSP, but not both).

Once registered, the portlet can be called from a block on the visitor's home page (block script). The visitor configuration script enables visitors to customize the portlet if there are any visitor-configurable parameters of the portlet. Optionally, there may be a page to display the portlet output in a larger window (page script) as part of the ordinary browsing through channels and programs.

 The *InfoExchange Developer's Guide* contains detailed information on writing these files.

InfoExchange Portal provides a portlet registry in the One-To-One Enterprise database to manage and maintain the administrative tasks. The Portlets option in the left menu of the InfoExchange Portal Admin Tool enables you to administer portlets and manage their attributes. Once a portlet is registered, visitors with access to it can place it on their home pages.

You can add portlets to the registry using information from an XML registration file. This registration file specifies the attributes of this portlet and who is allowed to modify those attributes. The *InfoExchange Developer's Guide* contains detailed information about the contents of the XML registration file and the portlet Document Type Definition (DTD).

A portlet is registered when its XML registration file and loading the data into portlet tables. The registration process is described in this section.

Registering a portlet

Before you register a portlet, you need to copy the files provided by the portlet developer into the `script_root/portlets` directory.

To register a portlet:

- select [Register New Portlet] in the Portlets window and use the shortcut to register a portlet.
- using the [Add New Channel], [Add New Program] or [Edit Program], and [Add Page Type] or [Edit Page Type] commands.

Registering a portlet

To register a portlet using the Portlets window:

1. Select Portlets in the Admin Tool. The Portlets window appears.

Click to register a new portlet — [Register New Portlet](#)

Click to edit a portlet — [\[Edit\]](#) [\[Delete\]](#) [\[Re-register\]](#)


Click to delete a portlet — [\[Edit\]](#) [\[Delete\]](#) [\[Re-register\]](#)

Click to re-register a portlet — [\[Edit\]](#) [\[Delete\]](#) [\[Re-register\]](#)

Portlets		
	On-line	Portlet
[Edit] [Delete] [Re-register]	✓	Alert Inbox Portlet
[Edit] [Delete] [Re-register]	✓	Bookmarks Portlet
[Edit] [Delete] [Re-register]	✓	Example Portlet
[Edit] [Delete] [Re-register]	✓	HTTP Portlet 1
[Edit] [Delete] [Re-register]	✓	HTTP Portlet 2
[Edit] [Delete] [Re-register]	✓	Reuters Portlet

2. Select [\[Register New Portlet\]](#). The Register Portlet window appears.

Register Portlet

Registration File 

3. Enter the pathname from the `portlets` directory or use the File Dialog icon to select the XML Registration File. To revert to the original values from the XML registration file, select the Reset button; otherwise, select the Next button to continue.

Register Portlet

Portlet Name

Portlet Version 1.0

InfoExchange Portal Version 6.0.0

Description

This provides a generic way to make an HTTP request. It expects that the administrator knows the form the request should take, including the required HTTP headers.

Status On-line Off-line

Portlet Type JSP

Block Script Path

Visitor Configuration Script Path

Full Page Script Path

Registration Page `/portlets/jsp/HTTP/http_portlet.xml`

Portlet Parameters						
ID	Friendly Name	Control Type	Scope	Value	Range of Values	Required
TIMEOUT	Timeout (in seconds)	text	site-wide		<i>Not applicable</i>	False
PARSE	Convert relative paths into absolute paths	checkbox	program		Checked = 1 Unchecked = 0	False
END	Ending Text	text	program		<i>Not applicable</i>	False
HEAD	HTTP Headers	text	program		<i>Not applicable</i>	False
QUERY	Query String	text	program		<i>Not applicable</i>	False
START	Starting Text	text	program		<i>Not applicable</i>	False
URL	URL	text	program	http://	<i>Not applicable</i>	True

The values for the portlet attributes are set in the XML registration file. Here you can set or modify the following portlet attribute values:

- **Portlet Name** - the name of the portlet (required).
- **Description** - text description of the portlet (optional).
- **Status** - whether the portlet is On-line or Off-line (required)
- **Block Script Path** - the path from the portlets directory to the block script (required)
- **Visitor Configuration Script Path** - the path from the portlets directory to the block script (optional)
- **Full Page Script Path** - the path from the portlets directory to the page script (optional)

The Portlet Version, InfoExchange Portal Version, Portlet Type, Registration Page, and Portlet Parameters are displayed but cannot be changed in this window.

To undo any changes you have made to this page of the form, select the Reset button; otherwise, select the Next button to continue.

Register Portlet

Portlet Name: HTTP Portlet

Site-wide Parameters

Timeout (in seconds):

Program-specific Parameters

Specify default values here. Values specified at the program level override these default values.

Convert relative paths into absolute paths:

Ending Text:

HTTP Headers:

Query String:

Starting Text:

URL:

Visitor-specific Parameters

Specify default values here. Values selected by the visitor override these default values.

Shortcut for Adding Portlets to Home Pages

This shortcut creates a program named "HTTP Portlet" in the Portlets channel, then adds it to a new block on the selected home page types. After the portlet is registered, edit the program directly to change the attributes of the portlet on the selected home page types.

Add Portlet to Home Pages:

Block Name:

In the third page of the Register Portlet form you can enter the default values for the following:

- **Site-wide Parameters** - parameters that pertain to the use of the portlet in the current service.
- **Program-specific Parameters** - parameters that are local to a program. These values are defaults. If changed, the values do not propagate to programs already created.
- **Visitor-specific Parameters** - parameters local to each visitor. These values are defaults. If changed, the values do not propagate to visitors who have set their own values.

You can also use the **Shortcut for Adding Portlets to Home Pages**. Here you can:

- **Add Portlet to Home Pages** - Use the left mouse button to select home page types to which this portlet is added.
- **Block Name** - Change the name of the portlet as it appears in the block on the visitor's home page.

- ▶ If you use this shortcut, the Admin Tool goes through the following steps behind the scenes:
- It creates a program with the same name as the portlet. This program is in the Portlets channel (which is off-line by default so visitors cannot navigate to it). This program has no qualifiers set, making it visible to all visitors who select it.
 - It creates an optional block on each selected home page with the name of the portlet.
 - It adds the newly-created program to this optional block.

You can modify programs and blocks created with the shortcut just like any that were created with other InfoExchange Portal Admin Tool windows.

To undo your changes, click the Reset button; otherwise, click the Register button to register the new portlet into a channel named Portlets.

Adding portlets to home pages without using the shortcut

There are reasons you may not want to use the shortcut for adding portlets to home pages:

- You want to register the portlet in a channel other than Portlets.
- You want to specify different attributes when the portlet runs under different programs.
- You want to set qualifiers on the portlet.

If you have any of these requirements, follow these steps to register a portlet:

1. Navigate to the channel in which you want to register this portlet. See “Administering channels” on page 28 for information on adding and editing channels.
2. Add the portlet as the content source for a new or existing program. See “Administering programs” on page 44 for information on adding and editing programs.
3. Edit the page type and add a new block or modify an existing block to point to the program. See “Administering home page types” on page 69 for details.

Editing a portlet

These are the steps you must follow to edit a portlet:

1. Select Portlets in the Admin Tool. The Portlets window appears.

The screenshot shows the 'Portlets' window with a table of portlets. Red circles and arrows highlight specific actions:

- 'Register New Portlet' is circled in red, with an arrow pointing to the text 'Click to register a new portlet'.
- '[Edit]' is circled in red for the first row, with an arrow pointing to the text 'Click to edit a portlet'.
- '[Delete]' is circled in red for the third row, with an arrow pointing to the text 'Click to delete a portlet'.
- '[Re-register]' is circled in red for the last row, with an arrow pointing to the text 'Click to re-register a portlet'.

	On-line	Portlet
Register New Portlet		
[Edit] [Delete] [Re-register]	✓	Alert Inbox Portlet
[Edit] [Delete] [Re-register]	✓	Bookmarks Portlet
[Edit] [Delete] [Re-register]	✓	Example Portlet
[Edit] [Delete] [Re-register]	✓	HTTP Portlet 1
[Edit] [Delete] [Re-register]	✓	HTTP Portlet 2
[Edit] [Delete] [Re-register]	✓	Reuters Portlet

2. Select [Edit] to the left of the name of the portlet you want to edit.

Edit Portlet

Portlet Name

Portlet Version

InfoExchange Portal Version

Description

Status On-line Off-line

Portlet Type

Block Script Path

Visitor Configuration Script Path

Full Page Script Path

Registration Page

Site-wide Parameters

Timeout (in seconds)

Program-specific Parameters

Specify default values here. Values specified at the program level override these default values.

Convert relative paths into absolute paths

Ending Text

HTTP Headers

Query String

Starting Text

URL

Visitor-specific Parameters

Specify default values here. Values selected by the visitor override these default values.

Here you can set or modify the following portlet attribute values:

- Portlet Name - the name of the portlet (required).
- Description - text description of the portlet (optional).
- Status - whether the portlet is On-line or Off-line (required)
- Block Script Path - the path from the portlets directory to the block script (required)
- Visitor Configuration Script Path - the path from the portlets directory to the block script (optional)
- Full Page Script Path - the path from the portlets directory to the page script (optional)

- **Site-wide Parameters** - parameters that pertain to the use of the portlet in the current service.
- **Program-specific Parameters** - parameters that are local to a program. These values are defaults. If changed, the values do not propagate to programs already created.
- **Visitor-specific Parameters** - parameters local to each visitor

The **Portlet Version**, **InfoExchange Portal Version**, **Portlet Type**, **Registration Page**, and **Portlet Parameters** are displayed but cannot be changed in this window.

To undo your changes, click the **Reset** button; otherwise, click the **Save** button to save the changes you have made to the portlet attributes.


Deleting a portlet

To delete a portlet, in the **Portlets** window, select **[Delete]** to the left of the name of the portlet you want to edit. A pop-up window appears asking you to confirm your decision with the following warning:

WARNING:

Deleting a portlet will also delete all programs containing the portlet. If those programs are included in blocks on a visitor's home page, those blocks will be empty. If you intend to register this portlet again, you should choose **Re-register**, which will preserve the relationship with existing programs, rather than **Delete**.


Are you sure you want to delete this Portlet?

 Deleting the portlet also deletes the portlet attributes from the visitor profile.

If you decide you do not want to delete the portlet, select the **Cancel** button; otherwise select the **OK** button to delete the portlet.

Re-registering a portlet

If you have made significant changes to a portlet that is already assigned to existing programs, you can re-register the portlet. This enables you to add or delete portlet parameters and functionality while keeping the portlet in the program. If a program with a re-registered portlet is included in a block on a visitor's home page, the block will still contain content.


 Re-registering a portlet parses the registration file again. It overrides the script paths and all portlet dynamic attributes. If a dynamic attribute is removed from the XML file or its ID is changed, it is removed from the specification of this portlet, as well as from any visitors or programs that have this portlet registered.

These are the steps you must follow to re-register a portlet:

1. In the Portlets window, select [Re-register] to the left of the portlet you want to re-register. The first page of the Re-register Portlet form appears.

Re-register Portlet

Re-registering a portlet parses the registration file again. It overrides the script paths and all portlet dynamic attributes. If a dynamic attribute is removed from the XML file or its ID is changed, it is removed from the specification of this portlet, as well as from any visitors or programs that have this portlet registered.

Registration File 

Override old portlet name and description with values from registration file

2. Enter or use the File Dialog (scroll) icon to input the XML Registration File name.
3. By default, the re-registration process overrides only the dynamic attributes and script paths from the original XML registration file. To override all registration file parameters, including Name and Description, select the checkbox to the right of **Override old portlet name and description with values from registration file**.

4. To undo your changes, select the Reset button; otherwise, select the Next button to continue.

Re-register Portlet

Portlet Name

Portlet Version 1.0

InfoExchange Portal Version 6.0.0

Description

This provides a generic way to make an HTTP request. It expects that the administrator knows the form the request should take, including the required HTTP headers.

Status On-line Off-line

Portlet Type JSP

Block Script Path

Visitor Configuration Script Path

Full Page Script Path

Registration Page /portlets/jsp/HTTP/http_portlet.xml

Portlet Parameters						
ID	Friendly Name	Control Type	Scope	Value	Range of Values	Required
TIMEOUT	Timeout (in seconds)	text	site-wide		Not applicable	False
PARSE	Convert relative paths into absolute paths	checkbox	program		Checked = 1 Unchecked = 0	False
END	Ending Text	text	program		Not applicable	False
HEAD	HTTP Headers	text	program		Not applicable	False
QUERY	Query String	text	program		Not applicable	False
START	Starting Text	text	program		Not applicable	False
URL	URL	text	program	http://	Not applicable	True

Here you can set or modify the following portlet attribute values:

- Portlet Name - the name of the portlet (required).
- Description - text description of the portlet (optional).
- Status - whether the portlet is On-line or Off-line (required)
- Block Script Path - the path from the portlets directory to the block script (required)
- Visitor Configuration Script Path - the path from the portlets directory to the block script (optional)
- Full Page Script Path - the path from the portlets directory to the page configuration script (optional)

The Portlet Version, InfoExchange Portal Version, Portlet Type, Registration Page, and Portlet Parameters are displayed but cannot be changed in this window.

To undo any changes you have made to this page of the form, select the Reset button; otherwise, select the Next button to continue.

Re-register Portlet

Portlet Name HTTP Portlet

Site-wide Parameters

Timeout (in seconds)

Program-specific Parameters

Specify default values here. Values specified at the program level override these default values.

Convert relative paths into absolute paths

Ending Text

HTTP Headers

Query String

Starting Text

URL

Visitor-specific Parameters

Specify default values here. Values selected by the visitor override these default values.

Shortcut for Adding Portlets to Home Pages

This shortcut creates a program named "HTTP Portlet" in the Portlets channel, then adds it to a new block on the selected home page types. After the portlet is registered, edit the program directly to change the attributes of the portlet on the selected home page types.

Add Portlet to Home Pages


Block Name

In the third page of the Register Portlet form you can modify values for the following:

- Site-wide Parameters - parameters that pertain to the whole site
- Program-specific Parameters - parameters that are local to a program
- Visitor-specific Parameters - parameters local to each visitor

You can use the Shortcut for Adding Portlets to Home Pages to modify the following:

- Add Portlet to Home Pages - Use the left mouse button to select home page types to which this portlet is added.
- Block Name - Change the name of the portlet as it appears in the block on the visitor's home page.

 If you use this shortcut, the Admin Tool goes through the following steps behind the scenes:

- It creates a program with the same name as the portlet. This program is in the Portlets channel (which is off-line by default so visitors cannot navigate to it). This program has no qualifiers set, making it visible to all visitors who select it.
- It creates an optional block on each selected home page with the name of the portlet.
- It adds the newly-created program to this optional block.

You can modify programs and blocks created with the shortcut just like any that were created with other InfoExchange Portal Admin Tool windows.

To undo your changes, click the Reset button; otherwise, click the Re-register button to register the new portlet.

Adding portlets to configurable home pages

1. Create a new program in an appropriate channel (or modify the program created through the shortcut). Point it to the new portlet, and set its program-scope portlet attributes. See “Administering programs” on page 44 for details on how to do this.
2. Create or modify a page type. Add a new block to the page type, and reference the program in the block. The block can contain multiple programs, each of which may or may not contain a portlet. See “Administering home page types” on page 69 for details on administering home page types.

Administering channels

To administer a channel, click Channels & Programs on the left side of your screen.

The following screen appears in the right frame if you have [Site Admin](#) or [Service Admin](#) privileges.

The screenshot shows the 'Channels & Programs' admin interface. It features a purple header bar with the text 'Channels & Programs'. Below the header, there are two main sections. The first section is for channel administration and includes a link 'Browse All Channels' (circled in red), a text input field for 'Channel Name' (circled in red), and a spin box for 'Maximum Number to Find' set to 25 (circled in red). Below these are 'Find' and 'Reset' buttons. The second section is for program administration and includes a text input field for 'Program Name', a spin box for 'Maximum Number to Find' set to 25, and 'Find' and 'Reset' buttons. On the left side of the screenshot, there are three annotations with red lines pointing to the interface: 'Click to see all channels in the service' points to the 'Browse All Channels' link; 'Enter all or part of the name of a channel to administer' points to the 'Channel Name' input field; and 'Enter the maximum number of channels to return' points to the 'Maximum Number to Find' spin box.

The following screen appears in the right frame if you are a Channel Administrator (you do not have [Site Admin](#) or [Service Admin](#) privileges but can administer one or more channels).

The screenshot shows a web interface titled "Channels & Programs". At the top, there are two buttons: "Browse All Channels" and "Browse My Channels", both circled in red. Below these are two search sections. The first section is for "Channel Name" and has a "Maximum Number to Find" input field containing "25", also circled in red. Below this are "Find" and "Reset" buttons. The second section is for "Program Name" and also has a "Maximum Number to Find" input field containing "25" and "Find" and "Reset" buttons. On the left side of the screenshot, there are four lines of text with red arrows pointing to the corresponding elements in the interface:

- Click to return all channels including those you cannot administer (points to "Browse All Channels")
- Click to only return channels you can administer (points to "Browse My Channels")
- Enter all or part of the name of a channel to administer (points to the "Channel Name" input field)
- Enter the maximum number of channels to return (points to the "Maximum Number to Find" input field)

In this scenario you have the option of viewing all channels, including those you cannot administer by selecting [Browse All Channels], or to only see the channels you can administer, select [Browse My Channels].

In either scenario, you can enter a string or substring to search for within the channels in the service in the Channel Name box in the right frame, then enter the maximum number of channels to be returned in the Maximum Number to Find box. To find all channels, leave the Channel Name box empty. Click the Find box. The results appear in the right frame.

The channels are retrieved from the database, sorted alphabetically by their paths, and are organized like a directory tree with the subchannels under the channels.

Adding channels

To add a channel, select the [Browse All Channels] or [Browse My Channels] link at the top of the frame.

The screenshot shows a table titled "Channels & Programs" with a header "On-line Channel". The table lists various channels, each with an "Add Channel" link, "Edit" and "Delete" links, a status indicator (green checkmark), and a path to the channel. Red circles and lines highlight specific elements:

- "Add Channel" link is circled in red, with a line pointing to the text "Click to add a channel".
- "Edit" link is circled in red, with a line pointing to the text "Click to edit a channel".
- "Delete" link is circled in red, with a line pointing to the text "Click to delete a channel".
- "News / Company News / Engineering" path is circled in red, with a line pointing to the text "Click to navigate to a subchannel".

On-line	Channel
[Add Channel]	
[Edit] [Delete] ✓	/ Collateral
[Edit] [Delete] ✓	/ Corporate
[Edit] [Delete] ✓	/ Corporate / Case Studies
[Edit] [Delete] ✓	/ Corporate / From The CEO
[Edit] [Delete] ✓	/ Corporate / Working at Adventech
[Edit] [Delete] ✓	/ News
[Edit] [Delete] ✓	/ News / Company News
[Edit] [Delete] ✓	/ News / Company News / Engineering
[Edit] [Delete] ✓	/ News / Company News / EStaff only
[Edit] [Delete] ✓	/ News / Company News / HR Policies
[Edit] [Delete] ✓	/ News / Company News / Marketing and Sales
[Edit] [Delete] ✓	/ News / Regional News
[Edit] [Delete] ✓	/ News / Regional News / Asia Pacific News
[Edit] [Delete] ✓	/ News / Regional News / European News
[Edit] [Delete] ✓	/ News / Regional News / North American News
[Edit] [Delete]	/ Portlets
[Edit] [Delete] ✓	/ Products
[Edit] [Delete] ✓	/ Products / Product Announcements
[Edit] [Delete] ✓	/ Tools

▶ Only a [Site Admin](#) or [Service Admin](#) can add a channel to the Root channel. Channel Administrators can only add subchannels to the channels they can administer.

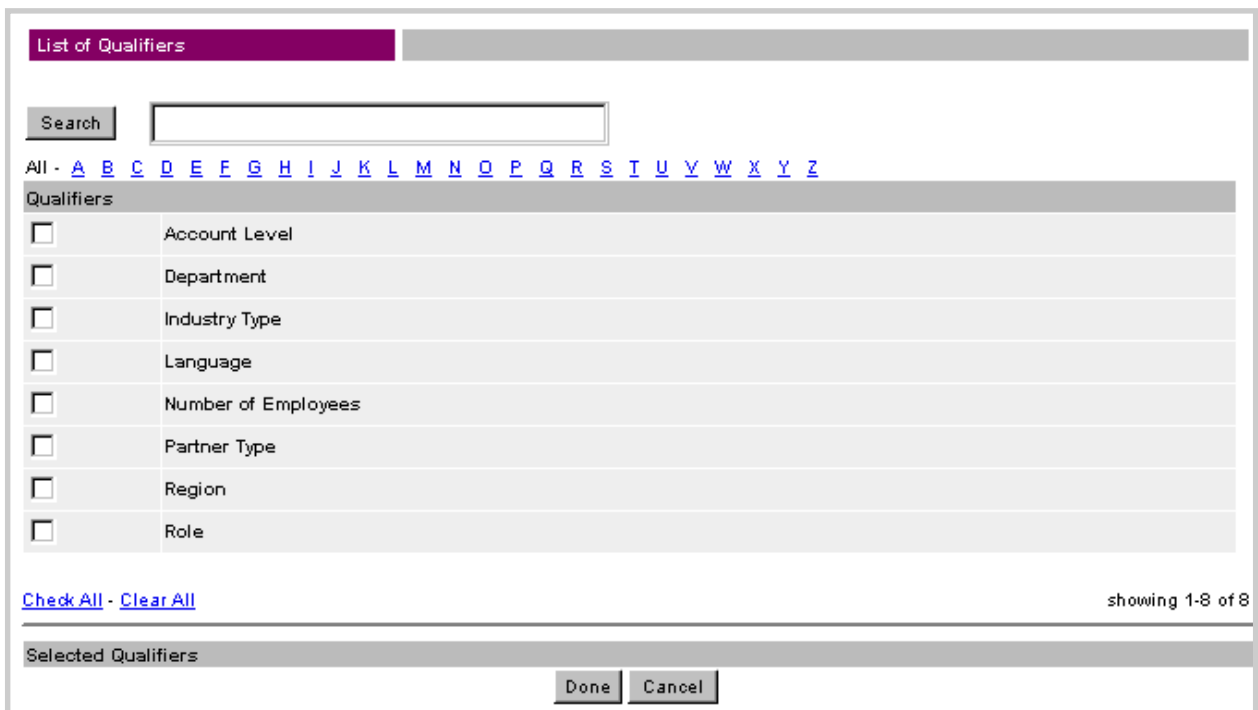
1. Navigate down to channels you can administer, then select **[Add Channel]** at the top of the page to add a channel. In this example, we add the top-level channel Customers.

The screenshot shows the 'Add Channel' form with the following fields and annotations:

- Channel Name:** Text box containing 'Customers'.
- Description:** Text area containing 'Customers of our company'.
- Channel Manager:** Empty text box.
- Channel Manager E-mail:** Empty text box.
- Status:** Radio buttons for 'On-line' (selected) and 'Off-line'.
- Channel Start Page:** Radio buttons for 'Script' (selected) and 'URL'. A scroll icon is circled in red, with a 'File Dialog' tooltip pointing to it. An annotation says 'Click to select a script or enter a URL as the Channel Start Page'.
- Select Qualifiers:** Text box with a 'Find' button circled in red. An annotation says 'Click to select qualifiers for this channel'.
- Select Administrators:** Text box with a 'Find' button circled in red. An annotation says 'Click to select the administrators of this channel'.
- Buttons:** 'Next' and 'Reset' buttons at the bottom.

2. On the first page of the form, enter the **Channel Name**. This is the text that appears on the link when the channel is displayed to the visitor.
3. You can enter an optional text **Description** of the channel.
4. **Channel Manager** and **Channel Manager E-mail** are optional; they contain the name and e-mail address of the person responsible for managing the channel.
 - **Status** can be:
 - On-line (visitors can see it)
 - Off-line (visitors cannot see it)
5. Choose either a script (including its relative path) or URL for the **Channel Start Page**. Either can serve as the channel's "Welcome" page. The filename path of a script is relative to the Interaction Manager's script root directory. Click the scroll icon for a file dialog in which you can select a script.

- ▶ The Channel Start Page script path used in the BVAdventech sample application is `/adventech/scripts/channel/default.jsp`.
 - ▶ To set a default value for the start page script input field, set `km_default_channel_page` in `§BV1T01_VAR/lib/script_library/bv_km_utils.js`.
6. Select Qualifiers enables you to restrict which channels and programs a visitor can see. In some cases a visitor can also be permitted to administer some qualifiers. Qualifiers are optional; you may select zero or more qualifier values per channel.
- ▶ If no qualifiers have been defined, the Qualifiers lists do not appear, and no values can be selected for the channel.
 - a. Click **Find** under **Select Qualifiers**; a pop-up window appears in which you can view the list of qualifiers in the service in groups of ten.



- b. To find the qualifiers you want to add:
 - Enter a string in the Search box to return a list of qualifiers with names that contain the search string
 - Select a letter under the Search box to retrieve all qualifiers that begin with that letter, or select All to retrieve all qualifiers.
 - c. Select the box next to each qualifier you want to select, select Check All to select all listed qualifiers, or select Clear All to deselect all listed qualifiers. To abort the operation, click Cancel. Otherwise, when you have finished selecting qualifiers, click Done.
7. Use **Select Administrators** to determine who can administer this channel.

▶ A channel administrator does not need to have any administrative privileges set in his or her Settings.

Click the Find button. A List of Users window appears.

The screenshot shows a window titled "List of Users". At the top left is a "Search" button followed by an empty search input field. Below that is a "Maximum Number to Find" field containing the number "25". Underneath is a "Search String" label followed by two radio buttons: "At beginning of login name or full name." (which is selected) and "Anywhere in login name or full name.". Below the radio buttons is a table header with two columns: "Login Name" and "Name". At the bottom of the window, there is a "Selected Users" label and two buttons: "Done" and "Cancel".

8. Enter a string in the Search box to return a list of user accounts with names that contain the search string.
9. Enter the maximum number of user accounts to be returned in the Maximum Number to Find box. To find all user accounts, leave the Search box empty.
10. To the right of Search String, choose one of the following radio buttons:
 - At beginning of login name or full name.
 - Anywhere in login name or full name.

Searching from the beginning of the name is faster than searching for the string anywhere in the name because the former has to search fewer characters in the database.

11. Click the Find box. The results appear in the List of Users pop-up window.

List of Users

Search

Maximum Number to Find

Search String At beginning of login name or full name.
 Anywhere in login name or full name.

	Login Name	Name
<input type="checkbox"/>	cesar	Cesar Customer
<input checked="" type="checkbox"/>	dave	Dave Enport
<input type="checkbox"/>	don	Don Ation
<input type="checkbox"/>	evan	Evan Tuly
<input checked="" type="checkbox"/>	fuzzball	Fuzzball White
<input type="checkbox"/>	joe	Joe Vial
<input type="checkbox"/>	lin	Lin Den
<input type="checkbox"/>	lisa	Lisa Truck
<input checked="" type="checkbox"/>	martha	Martha Marketer
<input type="checkbox"/>	mat	Mat Erial

[Check All](#) - [Clear All](#) showing 1-10 of 16 | [Next](#)

Selected Users

12. Select the box to the left of any visitor you want to be able to administer then channel. If applicable, you can select **Next** to view and select user accounts from the next ten results or **Previous** to view and select user accounts from the previous ten results. Select the **Cancel** button to return to the Add Channel window, or select the **Done** button to confirm your selection.

13. To undo your changes, click **Reset**. When you are finished with the first page, click **Next** to continue. The second page of the **Add Channel** form appears.

▶ Your changes are not made until you click Save on the second page.

The screenshot shows a web form titled "Add Channel" with a breadcrumb "/ Root". Below the title is a section labeled "Channel Customers". Underneath, there is a heading "Qualifiers" followed by a descriptive text: "Selecting no values for a particular Qualifier causes that Qualifier to be ignored when determining which Channels or Programs the visitor can see." There are three rows of qualifiers, each with a dropdown menu and a checked "Not Applicable" checkbox:

- Account Level:** Dropdown menu with options Aluminum, Bronze, Gold, Platinum. Not Applicable
- Industry Type:** Dropdown menu with options Government, High-Tech, Publishing, Telecom. Not Applicable
- Language:** Dropdown menu with options English, French, German, Spanish. Not Applicable

At the bottom of the form are two buttons: "Save" and "Reset".

14. Here you can set values for each of the selected qualifiers.

▶ If no qualifiers have been defined for your site, the Qualifiers lists do not appear, and you cannot select any values.

A visitor sees a channel when, for each qualifier of the channel or program that has one or more selected values, a selected value in that qualifier matches a selected value in the qualifier of the user account settings.

If a qualifier of the channel has no selected values (for example, if you do not select any languages for the qualifier Language), InfoExchange Portal ignores that qualifier in performing the match. Selecting the **Not Applicable** box below the qualifier values causes there to be no further restrictions on which visitors can see the channel.

When you add a subchannel, the initial navigation filter settings are the same as the parent channel's settings. You can override this, but your overrides can only further restrict which visitors can view the channel; selecting more qualifiers than the parent channel has selected does not increase visibility of the channel. When the parent channel's settings are changed, these changes do not propagate to existing subchannels.

15. To undo your changes, click the Reset button. When you are finished with the second page, click Save at the bottom of the page to save changes made to both pages of the form. The **Successfully Added Channel** frame appears and displays the parameters set for that channel.

Editing channels

To edit an existing channel, in the List of Channels, select **Edit** to the left of the channel name. If necessary, continue traversing the channel tree by clicking a subchannel name until you come to the channel you want to edit.

The **Add Channel** and **Edit Channel** forms are similar; the former is a blank version of the latter. To edit a channel, click **Edit** to the left of the channel name. In this example we edit the **Corporate** channel.

The **Corporate** channel has subchannels, so the choices for **Status** are **On-line**, **Off-line Branch**, and **On-line Branch**.

Click to select a script or enter a URL as the Channel Start Page

Click to change the parent channel for this channel

Click to change the qualifiers for this channel

Click to change the administrators of this channel

Edit Channel
/ [Root](#)

Channel Name: Corporate

Description: Description of Corporate channel.

Channel Manager: [Text Field]

Channel Manager E-mail: [Text Field]

Status: On-line Off-line Branch On-line Branch

Channel Start Page: Script URL

URL: /adventech/scripts/channel/def [Icon]

Select Parent Channel: Channel Root

Select Qualifiers: Role

Select Administrators: fuzzball, suzannah

Next Reset

1. On the first page, you can edit the **Channel Name**. This is the text that appears on the link when the channel is displayed to the visitor.
 2. You can also edit the text **Description** of the channel; this is optional.
- **Channel Manager** and **Channel Manager E-mail** are optional; they contain the name and e-mail address of the person responsible for managing the channel.

- **Status can be:**
 - On-line (visitors can see it)
 - Off-line (visitors cannot see it)
 - Off-line Branch (visitors cannot see it or its subchannels)
 - On-line Branch (visitors can see it or its subchannels)

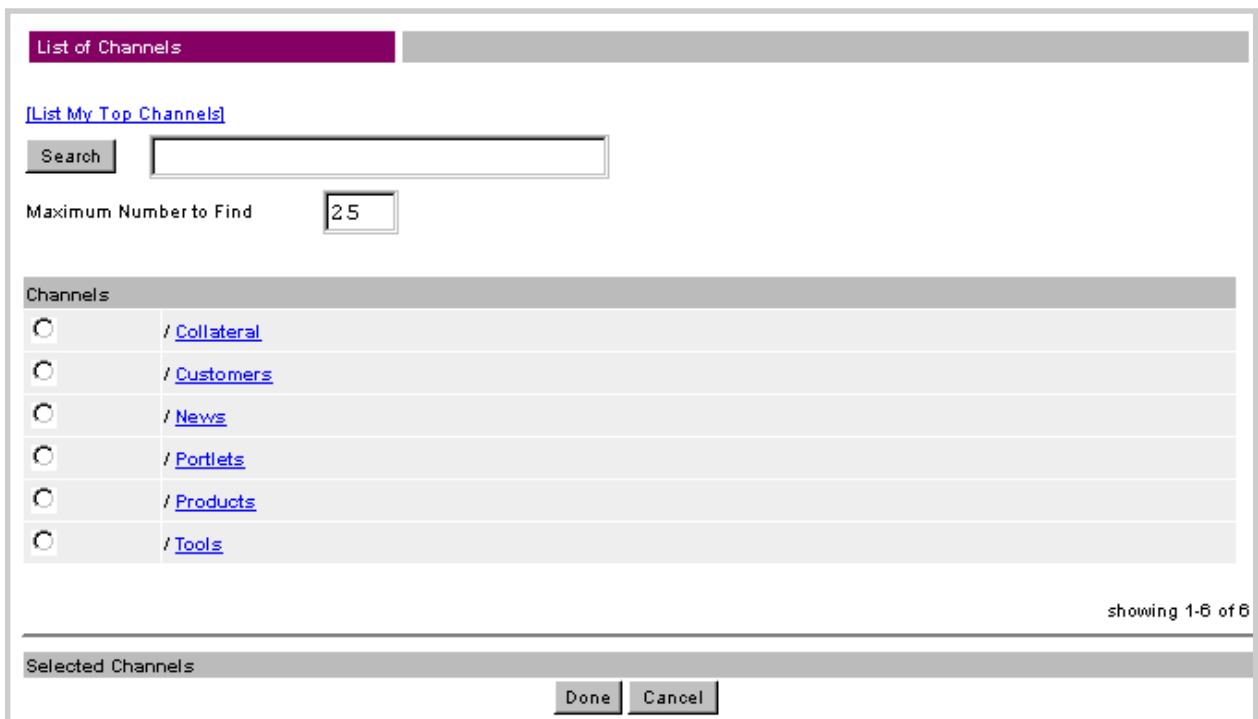
If a channel has no subchannels, the choices for **Status** are On-line and Off-line. If the channel has subchannels, the choices for **Status** are On-line, Off-line Branch, and On-line Branch. Off-line Branch makes the channel and its subchannels invisible to visitors when you save the channel edits. On-line Branch makes a channel and its subchannels visible when you save the channel edits. If the parent channel is Off-line, the subchannel's status is Off-line, and the channel cannot be made On-line until you make the parent channel On-line.

3. Choose either a script (including its relative path) or URL for the **Channel Start Page**. Either can serve as the channel's "Welcome" page. The filename path of a script is relative to the Interaction Manager's script root directory. Click the scroll icon for a file dialog in which you can select a script.

▶ The Channel Start Page script path used in the BVAdventech sample application is /
adventech/scripts/channel/default.jsp.

▶ To set a default value for the start page script input field, set `km_default_channel_page` in
\$BV1T01_VAR/lib/script_library/bv_km_utils.js.

4. Use **Select Parent Channel** to assign a parent channel to the new channel. Click the **Find** button. A List of Channels pop-up window appears.



5. You can list your top-level channels, search the channels for the service, or navigate through the channel hierarchy to the channel you want to use as the parent channel. Select the box to the left of the channel you want to use as the parent channel. Select the **Cancel** button to return to the Edit Channel window, or select the **Done** button to confirm your selection.

6. **Select Qualifiers** enables you to restrict which channels and programs a visitor can see. In some cases a visitor can also be permitted to administer some qualifiers. Qualifiers are optional; you may select zero or more qualifier values per channel.



If no qualifiers have been defined, the **Qualifiers** lists do not appear, and no values can be selected for the user template.

- a. Click **Find** under **Select Qualifiers**; a pop-up window appears in which you can view the list of qualifiers in the service in groups of ten.

List of Qualifiers	
<input type="checkbox"/>	Account Level
<input type="checkbox"/>	Department
<input type="checkbox"/>	Industry Type
<input type="checkbox"/>	Language
<input type="checkbox"/>	Number of Employees
<input type="checkbox"/>	Partner Type
<input type="checkbox"/>	Region
<i>Selected</i>	Role

[Check All](#) - [Clear All](#) showing 1-8 of 8

Selected Qualifiers	
<input checked="" type="checkbox"/>	Role

To find the qualifiers you want to add:

- Enter a string in the **Search** box to return a list of qualifiers with names that contain the search string
 - Select a letter under the **Search** box to retrieve all qualifiers that begin with that letter, or select **All** to retrieve all qualifiers.
- b. Select the box next to each qualifier you want to select, select **Check All** to select all listed qualifiers, or select **Clear All** to deselect all listed qualifiers. When you have finished selecting qualifiers, click **Done**.
 - c. In the box to the right of the **Find** button, use the left mouse button to highlight the qualifiers you want to assign to the channel.
7. Use **Select Administrators** to determine who can administer this channel.

▶ A channel administrator does not need to have any administrative privileges set in his or her Settings.

Click the Find button. A List of Users window appears.

Login Name	Name
fuzzball	Fuzzball White
suzannah	Suzannah Sales Manager

Selected Users
<input checked="" type="checkbox"/> fuzzball Fuzzball White
<input checked="" type="checkbox"/> suzannah Suzannah Sales Manager

8. Enter a string in the Search box to return a list of user accounts with names that contain the search string.
9. Enter the maximum number of user accounts to be returned in the Maximum Number to Find box. To find all user accounts, leave the Search box empty.
10. To the right of Search String, choose one of the following radio buttons:
 - At beginning of login name or full name.
 - Anywhere in login name or full name.

Searching from the beginning of the name is faster than searching for the string anywhere in the name because the former has to search fewer characters in the database.

11. Click the Find box. The results appear in the List of Users pop-up window.

List of Users

Search

Maximum Number to Find

Search String At beginning of login name or full name.
 Anywhere in login name or full name.

	Login Name	Name
<input type="checkbox"/>	cesar	Cesar Customer
<input type="checkbox"/>	dave	Dave Enport
<input type="checkbox"/>	don	Don Ation
<input type="checkbox"/>	evan	Evan Tuly
<i>Selected</i>	fuzzball	Fuzzball White
<input type="checkbox"/>	joe	Joe Vial
<input type="checkbox"/>	lin	Lin Den
<input type="checkbox"/>	lisa	Lisa Truck
<input type="checkbox"/>	martha	Martha Marketer
<input type="checkbox"/>	mat	Mat Erial

[Check All](#) - [Clear All](#) showing 1-10 of 16 | [Next](#)

Selected Users		
<input checked="" type="checkbox"/>	fuzzball	Fuzzball White
<input checked="" type="checkbox"/>	suzannah	Suzannah Sales Manager

12. Select the box to the left of any visitor you want to be able to administer then channel. If applicable, you can select **Next** to view and select user accounts from the next ten results or **Previous** to view and select user accounts from the previous ten results. Select the **Cancel** button to return to the Edit Channel window, or select the **Done** button to confirm your selection.

13. To undo your changes, click **Reset**. When you are finished with the first page, click **Next** to continue. The second page of the Edit Channel form appears.

▶ Your changes are not made until you click Save on the second page.

Edit Channel
/ [Root](#)

Channel Corporate

Qualifiers *Selecting no values for a particular Qualifier causes that Qualifier to be ignored when determining which Channels or Programs the visitor can see.*

Role

- Contributor
- Customer
- Director
- E-Staff

Not Applicable

Apply Qualifier Changes to Subchannels

14. Here you can change values for each of the selected qualifiers by holding down the Control key and clicking the left mouse button over the name of the qualifier value you want to select or deselect.

▶ If no qualifiers have been defined for your site, the Qualifiers lists do not appear, and you cannot select any values.

A visitor sees a channel when, for each qualifier of the channel or program that has one or more selected values, a selected value in that qualifier matches a selected value in the qualifier of the user account settings.

If a qualifier of the channel has no selected values (for example, if you do not select any languages for the qualifier **Language**), InfoExchange Portal ignores that qualifier in performing the match. Selecting the **Not Applicable** box below the qualifier values causes there to be no further restrictions on which visitors can see the channel.

15. When the qualifier settings of the parent channel are changed, these changes can propagate to existing subchannels if you select **Apply Qualifier Changes to Subchannels**. Deselecting this causes qualifier changes to a parent channel to not propagate down to subchannels.

To undo your changes, click the **Reset** button. When you are finished with the second page, click **Save** at the bottom of the page to save changes made to both pages of the form.

Moving channels

Follow these instructions to move a channel under a different parent channel:

1. Click **Edit** to the left of the channel you want to move.

The Edit Channel window appears.

The screenshot shows the 'Edit Channel' window with the following fields and options:

- Channel Name:** Corporate
- Description:** Description of Corporate channel.
- Channel Manager:** (empty)
- Channel Manager E-mail:** (empty)
- Status:** On-line Off-line Branch On-line Branch
- Channel Start Page:** Script URL
- URL:** /adventech/scripts/channel/def
- Select Parent Channel:** Channel Root. A red circle highlights the 'Find' button next to the 'Channel' radio button, with an arrow pointing to it from the text 'Click to change the parent channel for this channel'.
- Select Qualifiers:** Find Role
- Select Administrators:** Find fuzball, suzannah

At the bottom of the window are 'Next' and 'Reset' buttons.

2. Either click the button next to **Root** to select the Root channel as the new parent channel, or to insert this channel under another channel, follow these steps:

3. Use **Select Parent Channel** to assign a parent channel to the new channel. Click the **Find** button. A **List of Channels** window appears.

List of Channels

[\[List My Top Channels\]](#)

Search

Maximum Number to Find

Channels	
<input type="radio"/>	/ Collateral
<input type="radio"/>	/ Customers
<input type="radio"/>	/ News
<input type="radio"/>	/ Portlets
<input type="radio"/>	/ Products
<input type="radio"/>	/ Tools

showing 1-6 of 6

Selected Channels

Done Cancel

4. You can list your top-level channels, search the channels for the service, or navigate through the channel hierarchy to the channel you want to use as the parent channel. Select the box to the left of the channel you want to use as the parent channel. Select the **Cancel** button to return to the **Edit Channel** window, or select the **Done** button to confirm your selection.
5. Click **Next** to proceed to the next page, then click **Save** to save your changes.

To view the channel under its new parent, navigate to and select the name of the parent channel.

Deleting channels

When you delete a channel, you also delete its subchannels. Programs that belonged only to that channel appear at the bottom of the channels and programs list. If the visitor has added these programs to their home page, the programs will still be available to them. Visitors will not be able to navigate to the programs, but the programs will still appear on the home page. To continue using programs belonging to a deleted channel, reassign them to other channels before deleting them.

Click **Delete** to the left of a channel name to delete it; you are then asked for confirmation before the channel is deleted. Note that deleted channels cannot be “undeleted.”

You may want to prevent visitors from seeing certain channels or programs. To take a channel off-line, edit the channel, then change the **Status** setting for that channel. The visitors can still see the programs associated with this channel through their home pages. You must take each program off-line to hide it.

- ▶ There are two ways you can view or edit programs that have no parent channels in the Admin Tool:
 - Using the frame that appears when you click **Channels & Programs** on the left side of your screen, enter all or part of that program name, then click the **Find** button.
 - Select **[Browse All Channels]** to display the list of all top-level channels and all programs that have no parent channels.

Administering programs

- ▶ To perform program administration with the Admin Tool, you must either have [Site Admin](#) or [Service Admin](#) privileges or be an administrator for the primary parent channel of the program.

To administer a program, click **Channels & Programs** on the left side of your screen. A screen identical to or similar to the following screen appears in the right frame.

Click to return all top-level channels and all programs with no parent channels

The screenshot shows the 'Channels & Programs' interface. At the top, there are two buttons: **[Browse All Channels]** and **[Browse My Channels]**, both circled in red. Below these are two sections for searching. The first section is for channels, with a 'Channel Name' text box and a 'Maximum Number to Find' dropdown set to '25'. The second section is for programs, with a 'Program Name' text box and a 'Maximum Number to Find' dropdown set to '25'. Both sections have 'Find' and 'Reset' buttons.

Click to only return the top-level channels and programs with no parent channels you can administer

Enter all or part of the name of a program to administer

Enter the maximum number of programs to return

Finding existing programs

There are two ways you can find an existing program:

- Select **[Browse All Channels]** or **[Browse My Channels]** to display the list of all top-level channels and all programs that have no parent channels. The results appear in the right window. Navigate by selecting channel and subchannel names until you find the desired program.

- Enter the name of the program or part of the name in the Program Name box, then enter the maximum number of programs to be returned in the Maximum Number to Find box. To find all programs, leave the Program Name box empty. Click the Find button. The results appear in the right window.

Click to edit a program

Click to delete a program

List of Programs		
On-line	Program	
[Edit] [Delete]	✓	Accessories
[Edit] [Delete]	✓	All Departments
[Edit] [Delete]	✓	All Employees
[Edit] [Delete]	✓	All Internet Guests
[Edit] [Delete]	✓	All Sales Employees
[Edit] [Delete]	✓	Asia Pacific Product Releases
[Edit] [Delete]	✓	Competitive Analysis
[Edit] [Delete]	✓	Culture and Values
[Edit] [Delete]	✓	Culture et Valeurs
[Edit] [Delete]	✓	Data Sheets
[Edit] [Delete]	✓	European Product Releases
[Edit] [Delete]	✓	Events in France
[Edit] [Delete]	✓	Events in Germany
[Edit] [Delete]	✓	Investor Relations
[Edit] [Delete]	✓	Jobs at Adventech
[Edit] [Delete]	✓	Kultur und Werte
[Edit] [Delete]	✓	Latest News
[Edit] [Delete]	✓	Latin American Product Releases
[Edit] [Delete]	✓	MRDs
[Edit] [Delete]	✓	Marketing
[Edit] [Delete]	✓	News in the UK
[Edit] [Delete]	✓	North American Product Releases
[Edit] [Delete]	✓	PDAs
[Edit] [Delete]	✓	Price Lists
[Edit] [Delete]	✓	Sales

Adding programs

To add a program, follow these steps.

1. To add a program, find a list of channels, then select one of the channels to navigate down to where you can add a program to a subchannel.

Name of the channel to which the program is being added

Click to add a program to this channel

The screenshot shows a web interface titled "Channels & Programs". At the top, there is a breadcrumb navigation path: "/ Root / Product / **Product Announcements**". The "Product Announcements" link is circled in red. Below the breadcrumb, there is a section for "On-line Channel" with a button labeled "[Add Channel]". Below that, there is a section for "On-line Program" with a button labeled "[Add Program]" circled in red. Below the "[Add Program]" button, there is a list of four programs, each with an "Edit" and "Delete" link, a green checkmark, and the program name: "European Product Releases", "Asia Pacific Product Releases", "North American Product Releases", and "Latin American Product Releases".

On-line Channel	
[Add Channel]	

On-line Program	
[Add Program]	
[Edit] [Delete] ✓	European Product Releases
[Edit] [Delete] ✓	Asia Pacific Product Releases
[Edit] [Delete] ✓	North American Product Releases
[Edit] [Delete] ✓	Latin American Product Releases

2. When you are at the level where you want to add a program, select [Add Program] at the top of the program list. In this example, we add the program Antarctic Sales to the channel Product Announcements.

Add Program to Channel
/ Root / Products / Product Announcements

Channel Name: Product Announcements

Program Name:

Description:

Program Manager Name:

Program Manager E-mail:

Display Order:

Status: On-line Off-line

Program Content Source:

BroadVision Content

Rule Set: Program Type:

Portlet

Find:


Select Parent Channels for Program:

Find:

Select Qualifiers:

Find:

Next Reset

 Channel Name is the name of the parent channel. This text cannot be edited from the Add Program in Channel form.


3. Enter the **Program Name**, which is the text that appears on the link when the program is displayed to the visitor. Each program name must be unique because programs are implemented as content items.
4. You can enter an optional text **Description**. This field contains a text description of the program.

5. The **Program Manager Name** and **Program Manager E-mail** are optional; they contain the name and e-mail address of the person responsible for managing the program.
6. Choose a **Display Order** number from the list. This is the position of this program in the list of the channel's programs. The Admin Tool displays programs by Display Order in the list of a channel's programs. When you choose other parent channels for the program (**Select Parent Channels for Program**), the program is added as the last program displayed in those other parent channels.
7. Choose either **On-line** or **Off-line** for the **Status**. **On-line** means visitors can see the program; **Off-line** means visitors cannot see it.
8. Enter a **Program Content Source** to serve as the "Welcome" page for the program.
 - When you select **BroadVision Content**, the source of content for the script must be one of the following:

Rule Set	Select a rule set from the list of rule sets in the rule set category specified in the Program Type as defined by the One-To-One Command Center. When a visitor to an InfoExchange Portal site chooses the link for this program, the rules in that rule set are evaluated and the matching content items appear as the program list.
Category	Categories are defined by the One-To-One Command Center. Click Find to select a category from the categories in the content type of the program type. When a visitor to an InfoExchange Portal site chooses the link for a program, the content items in the category appear as the program list. When you select Include content from subcategories , the content in the subcategories also appear in the program list. Note that the category list displayed by Find presents both on-line and off-line categories.
Content item	Click Find to select a content item in the content type of the program type. Enter any part of the content item name in the Find dialog box; all items that have that name appear in the results list. The list presents both on-line and off-line content.
Script	The path from the script root to a script.
URL	The URL of a site to use.

You must also select a **Program Type** from the drop-down list. This controls what rule sets, categories, and content you can pick as the program content source on the second page of the **Add Program to Channel** form. InfoExchange Portal uses the content type setting in the **Program Type** to determine which categories and content are available for selection. The rule set category in the **Program Type** determines which rule sets are available for use as the program content source. Unclassified rule sets cannot be used as the program content source.

- When you select **Portlet**, you must use the **Find** button to bring up a **Find Portlet** window from which you can select the portlet.
9. Use **Select Parent Channels for Program** to add or change the parent channels for the program. Although a program can become parentless when its parent channel is deleted, you cannot create a program that does not have a parent channel.

 As a channel administrator, when you select parent channels, you can select parent channels you cannot administer as long as you are able to administer the primary parent channel for the program.

- a. Click the Find button. A List of Channels window appears.

List of Channels

[\[List My Top Channels\]](#)

Search

Maximum Number to Find

Channels	
<input type="checkbox"/>	/ Collateral
<input type="checkbox"/>	/ Corporate
<input type="checkbox"/>	/ Customers
<input type="checkbox"/>	/ News
<input type="checkbox"/>	/ Portlets
<input type="checkbox"/>	/ Products
<input type="checkbox"/>	/ Tools

[Check All](#) - [Clear All](#) showing 1-7 of 7

Selected Channels

<input checked="" type="checkbox"/>	/ Products / Product Announcements
-------------------------------------	--

- b. You can list your top-level channels, search the channels for the service, or navigate through the channel hierarchy to channels you want to use as parent channels. Select the box to the left of each channel you want to use as the parent channel of the program. Select the Cancel button to return to the Add Program to Channel window, or select the Done button to confirm your selection.
 - c. Select channels to add to the available selection of parent channels, then click Done at the bottom of the form. The Channels you checked appear as selected in the Select Parent Channels for Program box.
10. Select Qualifiers enables you to restrict which programs a visitor can see. In some cases a visitor can also be permitted to administer some qualifiers. Qualifiers are optional; you may select zero or more qualifier values per program.
 - ▶ If no qualifiers have been defined, the Qualifiers lists do not appear, and no values can be selected for the program.

- a. Click **Find** under **Select Qualifiers**; a pop-up window appears in which you can view the list of qualifiers in the service in groups of ten.

List of Qualifiers

Search

All - [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Qualifiers

<input type="checkbox"/>	Account Level
<input type="checkbox"/>	Department
<input type="checkbox"/>	Industry Type
<input type="checkbox"/>	Language
<input type="checkbox"/>	Number of Employees
<input type="checkbox"/>	Partner Type
<input type="checkbox"/>	Region
<i>Selected</i>	Role

[Check All](#) - [Clear All](#) showing 1-8 of 8

Selected Qualifiers

<input checked="" type="checkbox"/>	Role
-------------------------------------	------

To find the qualifiers you want to add:

- Enter a string in the **Search** box to return a list of qualifiers with names that contain the search string
 - Select a letter under the **Search** box to retrieve all qualifiers that begin with that letter, or select **All** to retrieve all qualifiers.
- b. Select the box next to each qualifier you want to select, select **Check All** to select all listed qualifiers, or select **Clear All** to deselect all listed qualifiers. When you have finished selecting qualifiers, click **Done**.
11. To undo your changes, click **Reset**. When you are finished with the first page, click **Next** to continue. Note that your changes are not made until you click **Save** on the next page.

The appearance for the second page of the **Add Program to Channel** form differs based on your program content source.

Using a rule set as the program content source

If you chose **BroadVision Content** as the program content source and selected **Rule Set**, the top of the next window is similar to this:

Add Program to Channel
/ Root / Products / Product Announcements

Program Antarctic Sales

Primary Parent for Program /Products/Product Announcements

Program Start Page

Page Script Path

Block Script Path

Program Content Source

Rule Set

Publishing Category

Instant Publisher Form

Only show links for readable content

The category to which content for this program is published

The path from the script root to the Instant Publisher form for publishing to this program

Enter or select a Page Script Path and a Block Script Path for the Program Start Page

Select a Rule Set for the Program Content Source

Enter or select a Publishing Center category

Click to only show visitors links to content they can access

1. Set the **Program Start Page** by selecting a page script and a block script. A *page script* is the screen program full welcome page; a *block script* displays a program in a home page block.

▶ If loaded, the InfoExchange Portal sample application page scripts are located in the directory `script_root/adventech/scripts/browse`, the BVAdvenTech sample program script is located in the directory `script_root/adventech/scripts/browse/program.jsp`, and the BVAdvenTech sample block scripts are located in the directory `script_root/adventech/scripts/home/embed`. Additional sample block scripts are located in `$BV1T01/erm_app/examples/block_scripts`.

Use the links to navigate to the script you want to use. The path of the script from the `script_root` directory now appears in the **Add Program to Channel** window.

2. Set the following **Program Content Source** parameters:
 - **Rule Set** - Use the drop-down menu to select a rule set to use for the program content
 - **Publishing Category** - Either enter the text or use the Find button and use the pop-up Category Dialog window to navigate to the Publishing Center category to which the content is published.
 - **Instant Publisher Form** - Either enter the text or use the scroll icon to select the path from the script root to the Instant Publisher form for publishing to this program.
 - **Only show links for readable content** - Select the box to the left of this text if you only want links to be visible for content the visitor can access.
3. Complete the form as described in “[Finishing the Add Program to Channel form](#)” on page 56.

Using a category as the program content source

If you chose BroadVision Content as the program content source and selected Category, the top of the next window is similar to this:

The screenshot shows the 'Add Program to Channel' form with the following fields and annotations:

- Program Antarctic Sales**: Program name.
- Primary Parent for Program**: /Products/Product Announcements.
- Program Start Page**: Section header.
- Page Script Path**: Input field with a scroll icon, circled in red.
- Block Script Path**: Input field with a scroll icon, circled in red.
- Program Content Source**: Section header.
- Category**: Input field with a 'Find' button, circled in red.
- Instant Publisher Form**: Input field with a scroll icon, circled in red. Below it is the text: "The path from the script root to the Instant Publisher form for publishing to this program".
- Include content from subcategories**: checkbox, circled in red.
- Only show links for readable content**: checkbox, circled in red.

Annotations on the left side of the form:

- "Enter or select a Page Script Path and a Block Script Path for the Program Start Page" points to the Page Script Path and Block Script Path fields.
- "Select a Category for the Program Content Source" points to the Category field.
- "Enter or select the path to the Instant Publisher form" points to the Instant Publisher Form field.
- "Check to give visitors access to subcategories" points to the 'Include content from subcategories' checkbox.
- "Click to only show visitors links to content they can access" points to the 'Only show links for readable content' checkbox.

1. Set the Program Start Page by selecting a page script and a block script. A *page script* is the screen program full welcome page; a *block script* displays a program in a home page block.

▶ If loaded, the InfoExchange Portal sample application page scripts are located in the directory `script_root/adventech/scripts/browse`, the BVAdvenTech sample program script is located in the directory `script_root/adventech/scripts/browse/program.jsp`, and the BVAdvenTech sample block scripts are located in the directory `script_root/adventech/scripts/home/embed`. Additional sample block scripts are located in `$BV1T01/erm_app/examples/block_scripts`.

Use the links to navigate to the script you want to use. The path of the script from the `script_root` directory now appears in the Add Program to Channel window.

2. Set the following Program Content Source parameters:
 - **Category** - Either enter the text or use the Find button and use the pop-up Category Dialog window to navigate to the Publishing Center category to which the content is published.
 - **Instant Publisher Form** - Either enter the text or use the scroll icon to select the path from the script root to the Instant Publisher form for publishing to this program.
 - **Include content from subcategories** - Select the box to the left of this text if you want the visitor to be able to access content in subcategories of the selected category.
 - **Only show links for readable content** - Select the box to the left of this text if you only want links to be visible for content the visitor can access.
3. Complete the form as described in "Finishing the Add Program to Channel form" on page 56.

Using a content item as the program content source

If you chose **BroadVision Content** as the program content source and selected **Content Item**, the top of the next window is similar to this:

The screenshot shows the 'Add Program to Channel' window. The breadcrumb path is '/ Root / Products / Product Announcements'. The program name is 'Program Antarctic Sales'. The 'Primary Parent for Program' is '/Products/Product Announcements'. The 'Program Start Page' section has two input fields: 'Page Script Path' and 'Block Script Path', both with document icons to their right. These two fields are circled in red. The 'Program Content Source' section has a 'Content Item' label and a 'Find' button next to an empty text input field. This 'Find' button and its associated input field are also circled in red. On the left side of the screenshot, there are two text annotations with red lines pointing to the corresponding fields: 'Enter or select a Page Script Path and a Block Script Path for the Program Start Page' points to the script path fields, and 'Select a Content Item for the Program Content Source' points to the 'Find' button.

1. Set the **Program Start Page** by selecting a page script and a block script. A *page script* is the screen program full welcome page; a *block script* displays a program in a home page block.

▶ If loaded, the InfoExchange Portal sample application page scripts are located in the directory `script_root/adventech/scripts/browse`, the BVAdvenTech sample program script is located in the directory `script_root/adventech/scripts/browse/program.jsp`, and the BVAdvenTech sample block scripts are located in the directory `script_root/adventech/scripts/home/embed`. Additional sample block scripts are located in `$BV1T01/erm_app/examples/block_scripts`.

Use the links to navigate to the script you want to use. The path of the script from the `script_root` directory now appears in the **Add Program to Channel** window.

2. Under **Program Content Source**, click the **Find** button to the left of **Content Item** to use the Find Content pop-up box to locate the content item

To find the content item you want to use:

- a. Enter the all or part of name of the content item name in the Content Name box, then enter the maximum number of content items to be returned in the Maximum Number to Find box. To find all content items, leave the Content Name box empty. Click the Find button.

The screenshot shows a dialog box titled "List of Contents" with a "Search Again" link. The dialog contains a list of content items, each with a radio button. The item "Web Server Configuration and Performance" is selected. The list includes:

- Mission Statement
- Tradeshaw Calendar
- Product Manager
- Senior Sales Representative
- Senior Product Manager
- Location Awareness in Adventech CoolTown
- ACE Interoperability
- Appliance Computing Environment
- Technical Background on Appliance Computing and Related Topics
- Securities Analysts
- Web Server Configuration and Performance
- Adventech 9000 N-Class Servers Speed IRS Processing and Refunds
- Adventech to Transform Online Customer Support with E-Services
- Adventech Deliver Education E-Services to Help Companies Improve Performance
- Adventech Intelligent-agent Technology Provides Personalized Shopping
- Adventech elliptica Copier Toners Outscore Xerox
- Adventech Leads Market in Business-intelligence Performance
- Adventech Provides Server-management Solution for Adventech NetServer Systems
- Adventech OpenView Press and Analysts
- Adventech 9000 Servers Selected by United Airlines
- Adventech and Amazon.com Strike Web Infrastructure, Consumer Retail Pact
- Adventech Sign Agreement to Speed Content Delivery for ISPs
- DAQ Competitive Analysis
- TEK Competitive Analysis
- Mission Anweisung

At the bottom of the dialog are "Done" and "Cancel" buttons.

- b. Select the radio button next to the content item you want to select. To abort the addition of the content item and return to the second page of the Add Program to Channel form, select the Cancel button; otherwise, select the Done button to save your choice of content item.
3. Complete the form as described in ["Finishing the Add Program to Channel form" on page 56.](#)

Using a script as the program content source

If you chose **BroadVision Content** as the program content source and selected **Script**, the top of the next window is similar to this:

The screenshot shows the 'Add Program to Channel' form. The breadcrumb path is '/ Root / Products / Product Announcements'. The program name is 'Program Antarctic Sales'. The primary parent is '/Products/Product Announcements'. Under the 'Program Start Page' section, there are two input fields: 'Page Script Path' and 'Block Script Path'. Both fields are circled in red. A red arrow points from the text 'Enter or select a Page Script Path and a Block Script Path for the Program Start Page' to the 'Page Script Path' field.

1. Set the **Program Start Page** by selecting a page script and a block script. A *page script* is the screen program full welcome page; a *block script* displays a program in a home page block.

▶ If loaded, the InfoExchange Portal sample application page scripts are located in the directory `script_root/adventech/scripts/browse`, the BVAdvenTech sample program script is located in the directory `script_root/adventech/scripts/browse/program.jsp`, and the BVAdvenTech sample block scripts are located in the directory `script_root/adventech/scripts/home/embed`. Additional sample block scripts are located in `$BV1T01/erm_app/examples/block_scripts`.

Use the links to navigate to the script you want to use. The path of the script from the `script_root` directory now appears in the **Add Program to Channel** window.

2. Complete the form as described in [“Finishing the Add Program to Channel form”](#) on page 56.

Using a URL as the program content source

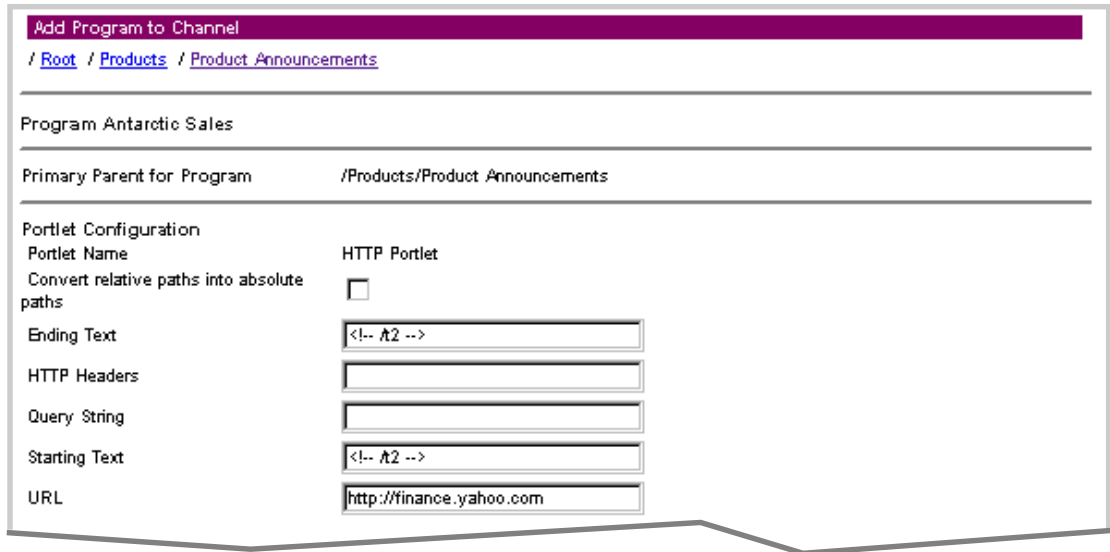
If you chose **BroadVision Content** as the program content source and selected **URL**, the top of the next window is similar to this:

The screenshot shows the 'Add Program to Channel' form. The breadcrumb path is '/ Root / Products / Product Announcements'. The program name is 'Program Antarctic Sales'. The primary parent is '/Products/Product Announcements'. Under the 'Program Start Page' section, there is a 'URL' label and an input field. The input field is circled in red. A red arrow points from the text 'Enter or select the URL for the Program Start Page' to the input field.

1. Set the **Program Start Page** by entering a URL.
2. Complete the form as described in [“Finishing the Add Program to Channel form”](#) on page 56.

Using a portlet as the program content source

If you chose **Portlet** as the program content source, the top of the next window is similar to this:



The screenshot shows a web form titled "Add Program to Channel" with a breadcrumb trail: / Root / Products / Product Announcements. The form is for "Program Antarctic Sales" and shows the "Primary Parent for Program" as "/Products/Product Announcements". The "Portlet Configuration" section includes the following fields:

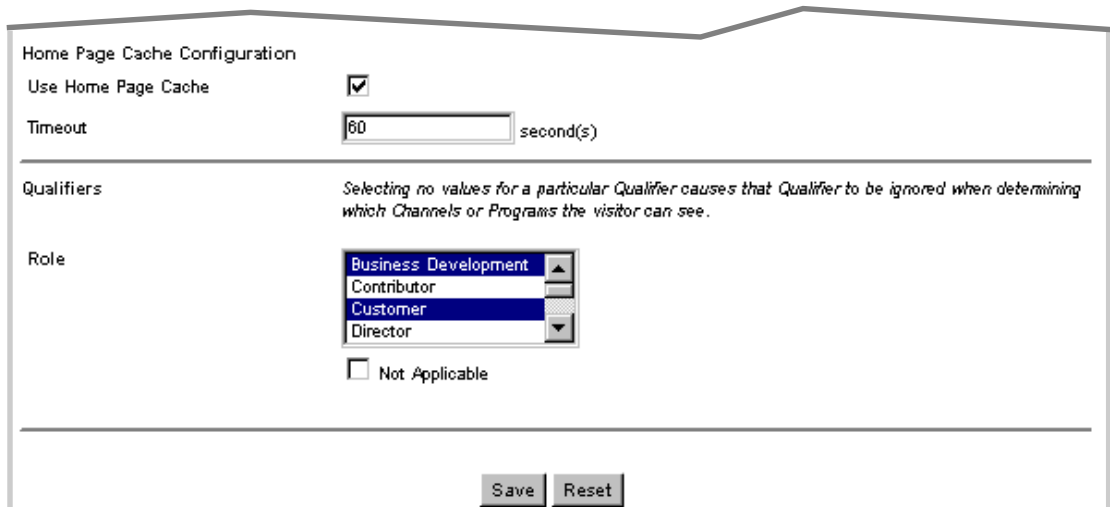
Portlet Name	HTTP Portlet
Convert relative paths into absolute paths	<input type="checkbox"/>
Ending Text	<!-- A2 -->
HTTP Headers	
Query String	
Starting Text	<!-- A2 -->
URL	http://finance.yahoo.com

Set **Portlet Configuration** parameters specific to this program, including those which are mandatory for the portlet to work properly.

3. Complete the form as described in ["Finishing the Add Program to Channel form"](#) on page 56.

Finishing the Add Program to Channel form

You still need to set the following parameters in all versions of the second page of the Add Program to Channel form.



The screenshot shows the "Home Page Cache Configuration" section of the form. It includes the following fields:

Use Home Page Cache	<input checked="" type="checkbox"/>
Timeout	60 second(s)
Qualifiers	<i>Selecting no values for a particular Qualifier causes that Qualifier to be ignored when determining which Channels or Programs the visitor can see.</i>
Role	<ul style="list-style-type: none">Business DevelopmentContributorCustomerDirector <input type="checkbox"/> Not Applicable

At the bottom of the form are "Save" and "Reset" buttons.

1. **Home Page Cache Configuration** determines whether to use the home page cache, along with the timeout length, in seconds, that sets the time the site waits before updating the program in the cache. For more information about using the home page cache, see ["Administering the home page cache"](#) on page 179.

2. The **Auxiliary Data** fields provide you with three integer and three string fields for entering additional data. These fields are optional.

For example, a Channel Administrator might want to store the program manager's phone number with the program. The program's start page script can fetch that additional data and display it to the visitor. A program has three text fields and three numeric fields for additional data. The developer of a site can access these additional fields (**INTCOL1**, **INTCOL2**, **INTCOL3**, **STRCOL1**, **STRCOL2**, and **STRCOL3**).

3. Set values for each of the selected **Qualifiers**.

 If no qualifiers have been defined for your site, the **Qualifiers** lists do not appear, and you cannot select any values.

A visitor sees a program when, for each qualifier of the channel or program that has one or more selected values, a selected value in that qualifier matches a selected value in the qualifier of the user account settings.

If a qualifier of the program has no selected values (for example, if you do not select any languages for the qualifier **Language**), InfoExchange Portal ignores that qualifier in performing the match. Selecting the **Not Applicable** box below the qualifier values causes there to be no further restrictions on which visitors can see the program.

To undo your changes to the page, click the **Reset** button. When you are finished with the second page, click the **Save** button at the bottom of the page to save changes made to both pages of the form.

Editing programs

To edit an existing program, in the List of Programs window, click [Edit] next to the name of the program you want to edit.

Click to edit a program

Click to delete a program

List of Programs	
On-line	Program
[Edit] [Delete]	✓ Accessories
[Edit] [Delete]	✓ All Departments
[Edit] [Delete]	✓ All Employees
[Edit] [Delete]	✓ All Internet Guests
[Edit] [Delete]	✓ All Sales Employees
[Edit] [Delete]	✓ Asia Pacific Product Releases
[Edit] [Delete]	✓ Competitive Analysis
[Edit] [Delete]	✓ Culture and Values
[Edit] [Delete]	✓ Culture et Valeurs
[Edit] [Delete]	✓ Data Sheets
[Edit] [Delete]	✓ European Product Releases
[Edit] [Delete]	✓ Events in France
[Edit] [Delete]	✓ Events in Germany
[Edit] [Delete]	✓ Investor Relations
[Edit] [Delete]	✓ Jobs at Adventech
[Edit] [Delete]	✓ Kultur und Werte
[Edit] [Delete]	✓ Latest News
[Edit] [Delete]	✓ Latin American Product Releases
[Edit] [Delete]	✓ MRDs
[Edit] [Delete]	✓ Marketing
[Edit] [Delete]	✓ News in the UK
[Edit] [Delete]	✓ North American Product Releases
[Edit] [Delete]	✓ PDAs
[Edit] [Delete]	✓ Price Lists
[Edit] [Delete]	✓ Sales

The Edit Program in Channel form appears similar. In this example we edit the All Departments program.

Edit Program in Channel
/ [Root](#) / [Corporate](#) / [Case Studies](#)

Channel Name: Case Studies

Program Name: All Departments

Description: Description of All Departments program.

Program Manager Name:

Program Manager E-mail:

Display Order: 1

Status: On-line Off-line

Program Content Source

BroadVision Content

Category: Program Type: Events, News and Press Releases

Portlet

Find:

Select Parent Channels for Program

Find: /Corporate/Case Studies

Select Qualifiers

Find: Role

Next Reset

▶ Channel Name is the name of the parent channel. This text cannot be edited from the Edit Program in Channel form.

You can modify the following values on the first page of the form:

1. **Program Name** - This is the text that appears on the link when the program is displayed to the visitor. Each program name must be unique because programs are implemented as content items.
2. **Description** - This optional text field contains a text description of the program.
3. The **Program Manager Name** and **Program Manager E-mail** are also optional; they contain the name and e-mail address of the person responsible for managing the program.
4. The **Display Order** - you can change the number from the list to change the position of this program in the list of the channel's programs. The Admin Tool displays programs by Display Order in the list of a channel's programs. When you choose other parent channels for the program (**Select Parent Channels for Program**), the program is added as the last program displayed in those other parent channels.
5. Choose either **On-line** or **Off-line** for the **Status**. **On-line** means visitors can see the program; **Off-line** means visitors cannot see it.
6. **Program Content Source** - this serves as the "Welcome" page for the program.
 - When you select **BroadVision Content**, the source of content for the script must be one of the following:

Rule Set	Select a rule set from the list of rule sets in the rule set category specified in the Program Type as defined by the One-To-One Command Center. When a visitor to an InfoExchange Portal site chooses the link for this program, the rules in that rule set are evaluated and the matching content items appear as the program list.
Category	Categories are defined by the One-To-One Command Center. Click Find to select a category from the categories in the content type of the program type. When a visitor to an InfoExchange Portal site chooses the link for a program, the content items in the category appear as the program list. When you select Include content from subcategories , the content in the subcategories also appear in the program list. Note that the category list displayed by Find presents both on-line and off-line categories.
Content item	Click Find to select a content item in the content type of the program type. Enter any part of the content item name in the Find dialog box; all items that have that name appear in the results list. The list presents both on-line and off-line content.
Script	The path from the script root to a script.
URL	The URL of a site to use.

Program Type - you can select a different one from the dropdown list. This controls what rule sets, categories, and content you can pick as the program content source on the second page of the **Edit Program in Channel** form. InfoExchange Portal uses the content type setting in the **Program Type** to determine which categories and content are available for selection. The rule set category in the **Program Type** determines which rule sets are available for use as the program content source. Unclassified rule sets cannot be used as the program content source.

- When you select **Portlet**, you must use the **Find** button to bring up a Find Portlet window from which you can select the portlet.
7. **Select Parent Channels for Program** - you can change the parent channels for the program. Although a program can become parentless when its parent channel is deleted, you cannot create a program that does not have a parent channel.

▶ As a channel administrator, when you select parent channels, you can select parent channels you cannot administer as long as you are able to administer the primary parent channel for the program.

- a. Click the Find button. A List of Channels window appears.

List of Channels

[\[List My Top Channels\]](#)

Search

Maximum Number to Find

Channels	
<input type="checkbox"/>	/ Collateral
<input type="checkbox"/>	/ Corporate
<input type="checkbox"/>	/ Customers
<input type="checkbox"/>	/ News
<input type="checkbox"/>	/ Portlets
<input type="checkbox"/>	/ Products
<input type="checkbox"/>	/ Tools

[Check All](#) - [Clear All](#) showing 1-7 of 7

Selected Channels

<input checked="" type="checkbox"/>	/ Corporate / Case Studies
-------------------------------------	--

- b. You can list your top-level channels, search the channels for the service, or navigate through the channel hierarchy to channels you want to use as parent channels. Select the box to the left of each channel you want to use as the parent channel of the program. Select the Cancel button to return to the Edit Program in Channel window, or select the Done button to confirm your selection.
- c. Select channels to add to the available selection of parent channels, then click Done at the bottom of the form. The Channels you checked appear as selected in the Select Parent Channels for Program box.

8. **Select Qualifiers** enables you to restrict which programs a visitor can see. In some cases a visitor can also be permitted to administer some qualifiers. Qualifiers are optional; you may select zero or more qualifier values per program.

▶ If no qualifiers have been defined, the **Qualifiers** lists do not appear, and no values can be selected for the program.

To change the qualifiers for this program:

- a. Click **Find** under **Select Qualifiers**; a pop-up window appears in which you can view the list of qualifiers in the service in groups of ten.

The screenshot shows a 'List of Qualifiers' dialog box. At the top, there is a search bar with a 'Search' button. Below the search bar are alphabetical filters from 'All' to 'Z'. A table lists qualifiers with checkboxes: Account Level, Department, Industry Type, Language, Number of Employees, Partner Type, Region, and Role. The 'Role' qualifier is selected. At the bottom, there are 'Check All' and 'Clear All' links, a 'showing 1-8 of 8' indicator, a 'Selected Qualifiers' section showing 'Role' checked, and 'Done' and 'Cancel' buttons.

To find the qualifiers you want to add:

- Enter a string in the **Search** box to return a list of qualifiers with names that contain the search string
 - Select a letter under the **Search** box to retrieve all qualifiers that begin with that letter, or select **All** to retrieve all qualifiers.
- b. Select the box next to each qualifier you want to select, and select any checked boxes next to qualifiers you want to deselect. You can select **Check All** to select all listed qualifiers or select **Clear All** to deselect all listed qualifiers. When you have finished selecting and deselecting qualifiers, click **Done**.

▶ The deselected qualifiers do not disappear from the list of qualifiers on the **Edit Program** in **Channel** form until the next time you add or edit a channel.

9. To undo your changes, click **Reset**. When you are finished with the first page, click **Next** to continue. Note that your changes are not made until you click **Save** on the next page.

The appearance fo the second page of the **Edit Program** in **Channel** form differs based on your program content source.

Using a rule set as the program content source

If you chose **BroadVision Content** as the program content source and selected **Rule Set**, the top of the next window is similar to this:

Edit Program in Channel
/ Root / Corporate / Case Studies

Program All Departments

Select Primary Parent for Program
 /Collateral
 /Corporate/Case Studies
Enables administrators of the selected channel to administer this program.

Program Start Page
 Page Script Path: /adventech/scripts/browse/program.jsp
 Block Script Path: /home/embed/program.jsp

Program Content Source
 Rule Set: KWA Press Releases matching rule set
 Publishing Category: Find
The category to which content for this program is published

Instant Publisher Form
The path from the script root to the Instant Publisher form for publishing to this program

Only show links for readable content

1. You can change the **Program Start Page** by selecting a different page script or block script. A *page script* is the screen program full welcome page; a *block script* displays a program in a home page block.

▶ If loaded, the InfoExchange Portal sample application page scripts are located in the directory `script_root/adventech/scripts/browse`, the BVAdvenTech sample program script is located in the directory `script_root/adventech/scripts/browse/program.jsp`, and the BVAdvenTech sample block scripts are located in the directory `script_root/adventech/scripts/home/embed`. Additional sample block scripts are located in `$BV1T01/erm_app/examples/block_scripts`.

Use the links to navigate to the script you want to use. The path of the script from the `script_root` directory now appears in the Edit Program in Channel window.

2. You can edit the following **Program Content Source** parameters:
 - **Rule Set** - Use the drop-down menu to select a rule set to use for the program content
 - **Publishing Category** - Either enter the text or use the Find button and use the pop-up Category Dialog window to navigate to the Publishing Center category to which the content is published.
 - **Instant Publisher Form** - Either enter the text or use the scroll icon to select the path from the script root to the Instant Publisher form for publishing to this program.
 - **Only show links for readable content** - Select the box to the left of this text if you only want links to be visible for content the visitor can access.
3. Complete the form as described in [“Finishing the Edit Program in Channel form”](#) on page 68.

Using a category as the program content source

If you chose **BroadVision Content** as the program content source and selected **Category**, the top of the next window is similar to this:

Edit Program in Channel
/ Root / Corporate / Case Studies

Program All Departments

Primary Parent for Program /Corporate/Case Studies

Program Start Page

Page Script Path /adventech/scripts/browse/program.jsp

Block Script Path /home/embed/program.jsp

Program Content Source

Category Find /Adventech/Department News/All Department

Instant Publisher Form

Include content from subcategories

Only show links for readable content

The path from the script root to the Instant Publisher form for publishing to this program

Annotations on the left:
 - Enter or select a Page Script Path or Block Script Path for the Program Start Page (points to Page Script Path and Block Script Path fields)
 - Select a Category for the Program Content Source (points to Category field)
 - Enter or select the path to the Instant Publisher form (points to Instant Publisher Form field)
 - Check to give visitors access to subcategories (points to 'Include content from subcategories' checkbox)
 - Click to only show visitors links to content they can access (points to 'Only show links for readable content' checkbox)

1. You can change the **Program Start Page** by selecting a different page script or block script. A *page script* is the screen program full welcome page; a *block script* displays a program in a home page block.

▶ If loaded, the InfoExchange Portal sample application page scripts are located in the directory `script_root/adventech/scripts/browse`, the BVAdvenTech sample program script is located in the directory `script_root/adventech/scripts/browse/program.jsp`, and the BVAdvenTech sample block scripts are located in the directory `script_root/adventech/scripts/home/embed`. Additional sample block scripts are located in `$BV1T01/erm_app/examples/block_scripts`.

Use the links to navigate to the script you want to use. The path of the script from the `script_root` directory now appears in the **Add Program to Channel** window.

2. You can change the following **Program Content Source** parameters:
 - **Category** - Either enter the text or use the **Find** button and use the pop-up **Category Dialog** window to navigate to the Publishing Center category to which the content is published.
 - **Instant Publisher Form** - Either enter the text or use the scroll icon to select the path from the script root to the Instant Publisher form for publishing to this program.
 - **Include content from subcategories** - Select the box to the left of this text if you want the visitor to be able to access content in subcategories of the selected category; deselect it if you want to deny access to content in subcategories of the selected category.
 - **Only show links for readable content** - Select the box to the left of this text if you only want links to be visible for content the visitor can access. If deselected, visitors see links to all content whether or not they can access it.
3. Complete the form as described in [“Finishing the Edit Program in Channel form”](#) on page 68.

Using a content item as the program content source

If you chose **BroadVision Content** as the program content source and selected **Content Item**, the top of the next window is similar to this:

The screenshot shows the 'Edit Program in Channel' window with the following fields and annotations:

- Program All Departments:** / Root / Corporate / Case Studies
- Primary Parent for Program:** /Corporate/Case Studies
- Program Start Page:**
 - Page Script Path:** /adventech/scripts/browse/program.jsp (circled in red)
 - Block Script Path:** /home/embed/program.jsp (circled in red)
- Program Content Source:**
 - Content Item:** Find [] (circled in red)

Annotations on the left side of the image:

- 'Enter or select a Page Script Path or Block Script Path for the Program Start Page' points to the Page Script Path and Block Script Path fields.
- 'Select a Content Item for the Program Content Source' points to the Content Item field.

1. You can change the **Program Start Page** by selecting a different page script and a block script. A *page script* is the screen program full welcome page; a *block script* displays a program in a home page block.

▶ If loaded, the InfoExchange Portal sample application page scripts are located in the directory `script_root/adventech/scripts/browse`, the BVAdvenTech sample program script is located in the directory `script_root/adventech/scripts/browse/program.jsp`, and the BVAdvenTech sample block scripts are located in the directory `script_root/adventech/scripts/home/embed`. Additional sample block scripts are located in `$BV1T01/erm_app/examples/block_scripts`.

Use the links to navigate to the script you want to use. The path of the script from the `script_root` directory now appears in the Edit Program in Channel window.

2. You can change the content item. Under Program Content Source, click the Find button to the left of Content Item to use the Find Content pop-up box to locate the content item

To find the content item you want to use:

- a. Enter all or part of name of the content item name in the Content Name box, then enter the maximum number of content items to be returned in the Maximum Number to Find box. To find all content items, leave the Program Name box empty. Click the Find button.

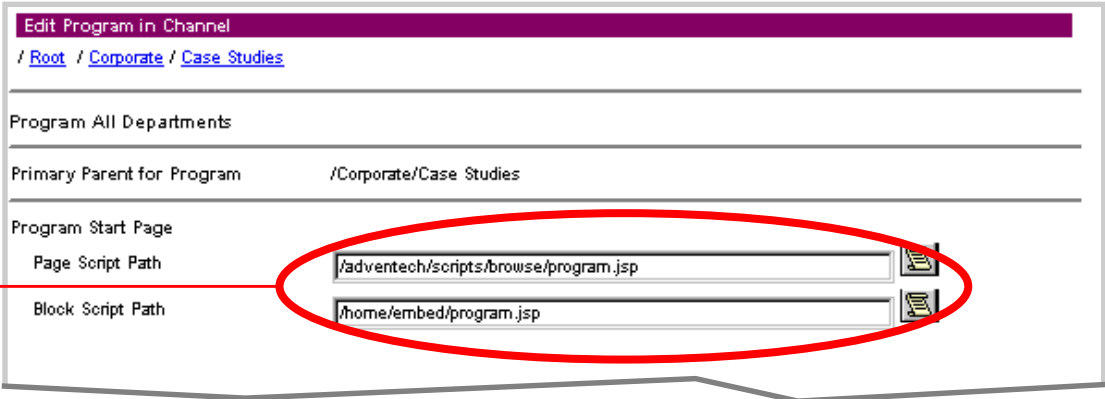
The screenshot shows a dialog box titled "List of Contents" with a "Search Again" button. The main area contains a list of content items, each preceded by a radio button. The item "Web Server Configuration and Performance" is selected. The list includes items such as "Mission Statement", "Tradeshows Calendar", "Product Manager", "Senior Sales Representative", "Senior Product Manager", "Location Awareness in Adventech CoolTown", "ACE Interoperability", "Appliance Computing Environment", "Technical Background on Appliance Computing and Related Topics", "Securities Analysts", "Adventech 9000 N-Class Servers Speed IRS Processing and Refunds", "Adventech to Transform Online Customer Support with E-Services", "Adventech Deliver Education E-Services to Help Companies Improve Performance", "Adventech Intelligent-agent Technology Provides Personalized Shopping", "Adventech elliptica Copier Toners Outscore Xerox", "Adventech Leads Market in Business-intelligence Performance", "Adventech Provides Server-management Solution for Adventech NetServer Systems", "Adventech OpenView Press and Analysts", "Adventech 9000 Servers Selected by United Airlines", "Adventech and Amazon.com Strike Web Infrastructure, Consumer Retail Pact", "Adventech Sign Agreement to Speed Content Delivery for ISPs", "DAQ Competitive Analysis", "TEK Competitive Analysis", and "Mission Anweisung". At the bottom of the dialog are "Done" and "Cancel" buttons.

- b. Select the radio button next to the content item you want to select. To abort the addition of the content item and return to the second page of the Edit Program in Channel form, select the Cancel button; otherwise, select the Done button to save your choice of content item.
3. Complete the form as described in [“Finishing the Edit Program in Channel form”](#) on page 68.

Using a script as the program content source

If you chose **BroadVision Content** as the program content source and selected **Script**, the top of the next window is similar to this:

Enter or select a Page Script Path or Block Script Path for the Program Start Page



The screenshot shows a web form titled "Edit Program in Channel" with a breadcrumb trail: / Root / Corporate / Case Studies. Below this, there are several fields: "Program All Departments", "Primary Parent for Program" (value: /Corporate/Case Studies), and "Program Start Page". Under "Program Start Page", there are two input fields: "Page Script Path" with the value "/adventech/scripts/browse/program.jsp" and "Block Script Path" with the value "/home/embed/program.jsp". Both input fields are circled in red. A red arrow points from the text "Enter or select a Page Script Path or Block Script Path for the Program Start Page" to the "Page Script Path" field.

1. You can change the Program Start Page by selecting a different page script and a block script. A *page script* is the screen program full welcome page; a *block script* displays a program in a home page block.

▶ If loaded, the InfoExchange Portal sample application page scripts are located in the directory *script_root/adventech/scripts/browse*, the BVAdvenTech sample program script is located in the directory *script_root/adventech/scripts/browse/program.jsp*, and the BVAdvenTech sample block scripts are located in the directory *script_root/adventech/scripts/home/embed*. Additional sample block scripts are located in *§BV1T01/erm_app/examples/block_scripts*.

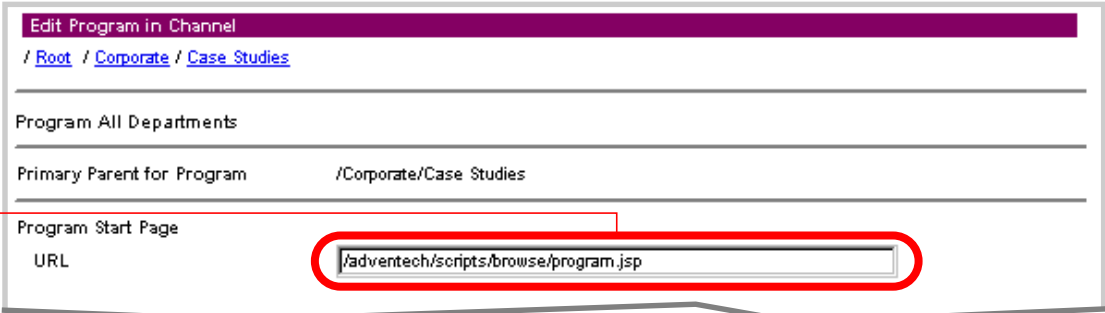
Use the links to navigate to the script you want to use. The path of the script from the *script_root* directory now appears in the Edit Program in Channel window.

2. Complete the form as described in “[Finishing the Edit Program in Channel form](#)” on page 68.

Using a URL as the program content source

If you chose **BroadVision Content** as the program content source and selected **URL**, the top of the next window is similar to this:

Enter a URL for the Program Start Page

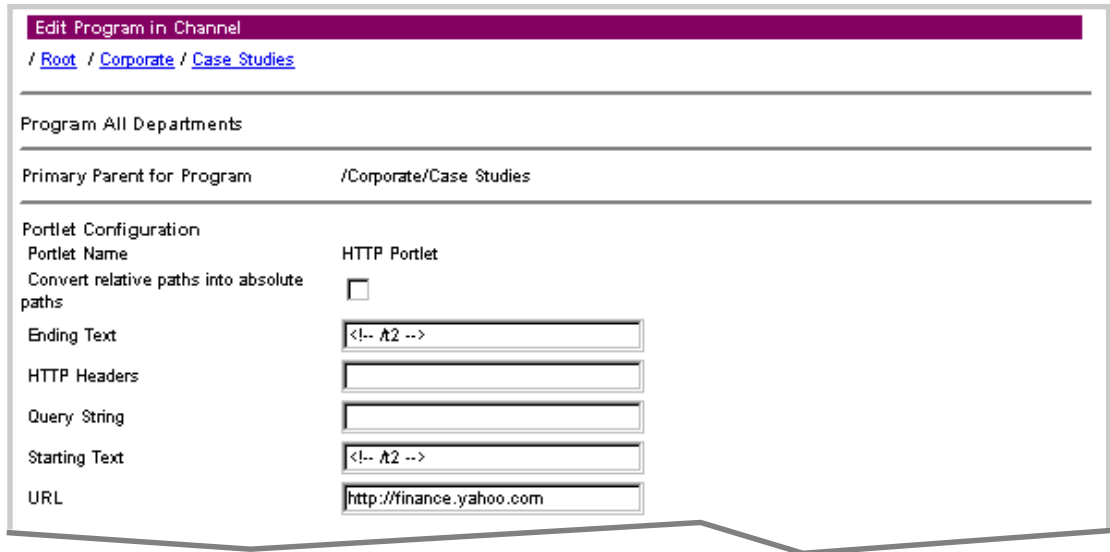


The screenshot shows a web form titled "Edit Program in Channel" with a breadcrumb trail: / Root / Corporate / Case Studies. Below this, there are several fields: "Program All Departments", "Primary Parent for Program" (value: /Corporate/Case Studies), and "Program Start Page". Under "Program Start Page", there is an input field labeled "URL" with the value "/adventech/scripts/browse/program.jsp". The input field is circled in red. A red arrow points from the text "Enter a URL for the Program Start Page" to the "URL" field.

1. You can change the Program Start Page by entering a different URL.
2. Complete the form as described in “[Finishing the Edit Program in Channel form](#)” on page 68.

Using a portlet as the program content source

If you chose **Portlet** as the program content source, the top of the next window is similar to this:



The screenshot shows a web form titled "Edit Program in Channel" with a breadcrumb trail: / Root / Corporate / Case Studies. Below the breadcrumb, it says "Program All Departments". The "Primary Parent for Program" is set to "/Corporate/Case Studies". The "Portlet Configuration" section includes the following fields:

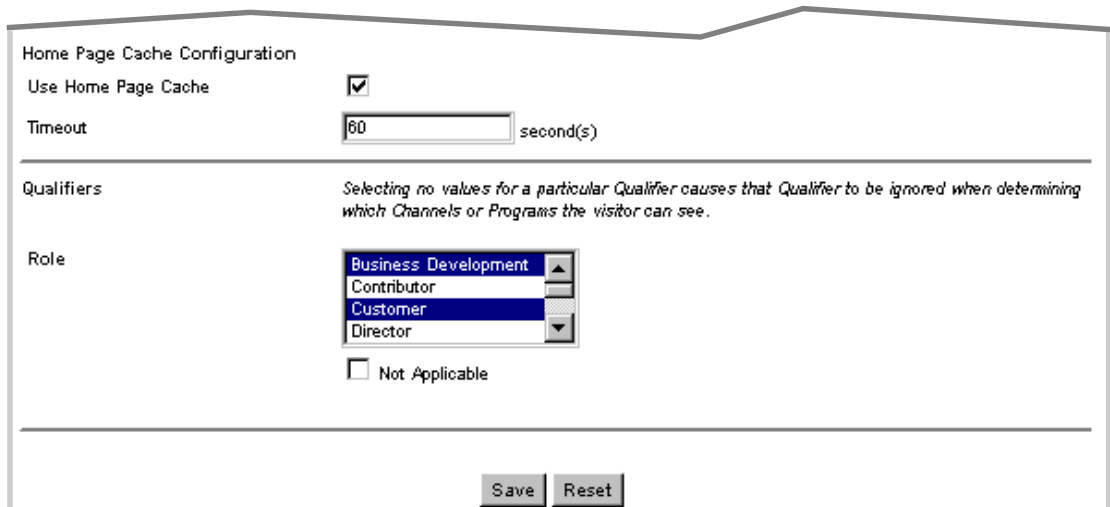
Portlet Name	HTTP Portlet
Convert relative paths into absolute paths	<input type="checkbox"/>
Ending Text	<!-- A2 -->
HTTP Headers	
Query String	
Starting Text	<!-- A2 -->
URL	http://finance.yahoo.com

You can edit **Portlet Configuration** parameters specific to this program, including those which are mandatory for the portlet to work properly.

3. Complete the form as described in [“Finishing the Edit Program in Channel form”](#) on page 68.

Finishing the Edit Program in Channel form

You can change the following on the second page of all versions of the Edit Channel in Program form.



The screenshot shows a web form titled "Home Page Cache Configuration" with the following fields:

Use Home Page Cache	<input checked="" type="checkbox"/>
Timeout	60 second(s)
Qualifiers	<i>Selecting no values for a particular Qualifier causes that Qualifier to be ignored when determining which Channels or Programs the visitor can see.</i>
Role	<ul style="list-style-type: none">Business DevelopmentContributorCustomerDirector <input type="checkbox"/> Not Applicable

At the bottom of the form are "Save" and "Reset" buttons.

1. **Home Page Cache Configuration** determines whether to use the home page cache, along with the timeout length, in seconds, that sets the time the site waits before updating the block in the cache. For more information about using the home page cache, see [“Administering the home page cache”](#) on page 179.

2. The **Auxiliary Data** fields provide you with three integer and three string fields for entering additional data. These fields are optional.

For example, a Channel Administrator might want to store the program manager's phone number with the program. The program's start page script can fetch that additional data and display it to the visitor. A program has three text fields and three numeric fields for additional data. The developer of a site can access these additional fields (**INTCOL1**, **INTCOL2**, **INTCOL3**, **STRCOL1**, **STRCOL2**, and **STRCOL3**).

3. Set values for each of the selected **Qualifiers**.

▶ If no qualifiers have been defined for your site, the **Qualifiers** lists do not appear, and you cannot select any values.

A visitor sees a program when, for each qualifier of the channel or program that has one or more selected values, a selected value in that qualifier matches a selected value in the qualifier of the user account settings.

If a qualifier of the program has no selected values (for example, if you do not select any languages for the qualifier **Language**), InfoExchange Portal ignores that qualifier in performing the match. Selecting the **Not Applicable** box below the qualifier values causes there to be no further restrictions on which visitors can see the program.

To undo your changes to the page, click the **Reset** button. When you are finished with the second page, click the **Save** button at the bottom of the page to save changes made to both pages of the form.

4. To undo your changes to the page, click **Reset** at the bottom of the page. When you are finished with the second page, click **Save** at the bottom of the page to save changes made to both pages of the form.

Deleting programs

Click **Delete** to delete a program and remove it from the channel. A confirmation window appears; click **OK**. The block is then deleted from the site.

▶ Deleting a program does not delete the content items the program references. When you delete a program, it is also deleted from all its parent channels. Deleted programs cannot be undeleted. To remove a program from one channel, edit the program and deselect the channel in the list box of parent channels.

Administering home page types

InfoExchange Portal enables visitors to configure their *home page*, which is the page they first see when they log into a site. The Site Administrator defines the available options in a home page, and visitors to the site can configure their home page by choosing from those options.

Each home page contains one or more *blocks*, which are groups of topics a visitor can arrange, collapse, expand, add to, or delete from a home page. For example, in the BV Adventech sample application, if you log in as a visitor, you see a home page comprised of one or more blocks. The links underneath each block are called *topics*. A topic is an InfoExchange Portal program. *Page types* enable you to define home pages containing blocks and topics.

InfoExchange Portal home pages also support *transient guests*, or visitors to a site who have not logged in.

Configuring InfoExchange Portal for transient guests

Many sites allow a visitor to have limited access to a site without logging in. The BVAdvenTech sample application start page provides limited access to a transient guest, enables the transient guest to create an account with the site, and enables a registered visitor to log into the site through the `bvadventech.html` start page.

▶ The `bvadventech.html` page takes you to a script that displays Login and Register links in the upper right-hand corner.

While user profiles for registered visitors are maintained in the database, profiles for transient guests are maintained in memory only. However, when a transient guest leaves the site, all known profile information about the visitor is discarded. This classification is used by sites where the visitor's identity is not integral to the application, such as sites that allow anonymous browsing.

Each visitor's user account, including the transient guest user account, is associated with a user template. The user template defines the access groups and qualifiers assigned to a new user account. Each user template is associated with a page type. The Page Types screen is where you define the information a visitor sees on his or her home page.

You must do the following before a transient guest can “log into” your site:

- set qualifiers
- set and configure access groups
- assign transient guest to a user template

“Administering qualifiers” on page 12 contains information on setting qualifiers, as well as setting and configuring access groups.

“Administering user templates” on page 87 contains information on creating and modifying user templates.

When you load the InfoExchange Portal sample data, you load additional data to support transient guests, including a “Guest” user template and a “Guest” page type. The user templates and page types for transient and registered visitors are administered using the InfoExchange Portal Admin Tool. The designation of which user template is used for transient guests is set in the `bv1to1.conf` file.

Specifically, you need to set the service-specific parameter `default_user_template` in the `bv1to1.conf` file. You can set its value to “Guest” as in the following example from the BVAdvenTech sample application, or you may set the value to any existing user template.

```
service Adventech {  
    parameter  
    default_user_template = "Guest"  
    email_address = "adventech-mgr@bvadventech.com"  
    postal_address = "12345 Main St, San Jose, CA"  
    www_url = "bvadventech.com"  
}
```

This causes all visitors to the Adventech service in the web site to be logged in with the “Guest” user template.

The sample script `guestlogin.jsp` contains code that creates a transient guest and assigns the transient guest to the default user template for all transient guests.

A transient guest can:

- select the optional and default blocks
- control the layout of the selected blocks
- change the heading and subheading colors

▶ When a transient guest registers, any heading and subheading colors they have chosen are preserved and override the user template default heading and subheading colors which are hard-coded in the `guestlogin.jsp` script.

Creating a page type

To administer configurable home pages, you must first create a *page type*. This involves creating and naming one or more blocks in the page type, and then specifying which programs are in the block. A visitor can configure a personal home page by choosing from the blocks you define, and then by choosing from the programs within the selected blocks. A visitor can also select the order of blocks and of programs within the blocks.

To create a page type, select **Page Types** in the left menu of the Admin Tool. A screen similar to the following appears:

Click to add a page type

Click to edit a page type

Click to delete a page type

Page Types	
Page Type	
Add Page Type	
Edit Delete	Customer Page Type
Edit Delete	Default Page Type
Edit Delete	Guest Page Type

Select **Add Page Type** to create a new page type.

Add Page Type

Page Type Name:

Home Page Script:

Number of Columns in Home Page:

Number of Entries in Required Blocks:

Enter the following parameters:

- **Page Type Name**

A user template references a page type. When you add or modify a user account, you can assign it a user template, which in turn causes you to indirectly assign a page type to a visitor. In the

example, “Home Page for News” is the new page type name (this name is not visible to visitors to the site).

- **Home Page Script**

This is the path to a script, relative to the script-root, that generates the visitor’s home page. For example:

```
/adventech/scripts/home/homeBusinessType.jsp
```

Enter the path from the script-root to the home page script of your choice, or use the scroll icon to navigate to it. This is the script that generates the page displayed after a visitor logs into a site. The script lays out and displays the blocks and programs of the home page.

- **Number of Columns in Home Page**

This defines the maximum number of columns of content the page contains. Use the pull-down menu to select a number from 1 to 3. Visitors to the site can use up to the specified number of columns to arrange their blocks.

▶ The InfoExchange Portal defaults to supporting up to three columns.

- **Number of Entries in Required Blocks**

This defines the maximum number of entries each program in each required block on the page can contain. Enter an integer.

To restore the parameters to their default settings, click the **Reset** button. To save the page type you have entered, along with its parameters, click the **Save** button. A frame appears telling you the page type has been successfully added.

Successfully Added Page Type

Page Type Name	Employee
Home Page Script	/adventech/scripts/home/homeBusinessType.jsp
Number of Columns in Home Page	1
Number of Entries in Required Blocks	5

[\[Add Block to Page Type\]](#) [\[Add Another Page Type\]](#)

To learn how to add one or more blocks to a page type, see “[Adding blocks](#)” on page 74.

Editing a page type

To edit an existing page type, click the [Edit] link to the left of the page type you wish to edit. The Edit Page Type frame appears:

Block	Optional	Default	Required
[Add Block]			
[Edit] [Delete] Client Technologies			X
[Edit] [Delete] HTTP Portlet	X		
[Edit] [Delete] News	X		
[Edit] [Delete] Server Technologies	X		

From the Edit Page Type window you can change the following page type parameters:

- **Page Type Name**
This appears in the User Template as the name of the page type when you assign a page type to a user template. In this example, “Customer Page Type” is the current page type.
- **Home Page Script**
This is the path to a script, relative to the script-root, that generates the visitor’s home page. For example:

```
/adventech/scripts/home/homeBusinessType.jsp
```


Enter the path from the script-root to the home page script of your choice, or use the scroll icon to navigate to it. This is the script that generates the page displayed after a visitor logs into a site. The script lays out and displays the blocks and programs of the home page.
- **Number of Columns in Home Page**
This defines the maximum number of columns of content the page contains. Use the drop-down menu to select a number from 1 to 3. Visitors to the site can use up to the specified number of columns to arrange their blocks.
- **Number of Entries in Required Blocks**
This defines the maximum number of entries in each of the required blocks.

You can also add or edit blocks to this page type. To add a block, see “[Adding blocks](#),” next; to edit a block, see “[Editing blocks](#)” on page 77.

To restore the parameters to their previous settings, click **Reset**. To save the changes you have entered for this page type, click **Save**.

Adding blocks

The **Add Page Type** and **Edit Page Type** frame are where you add blocks to the page type, edit an existing block, or delete a block from the page type.

To add a block to a page immediately after you have added the page type:

1. From the **Add Page Type** success page, select the **Add Block to Page Type** link. To add a block while editing a page type, select the **[Add Block]** link. A frame similar to the following appears:

The screenshot shows a web form titled "Add Block". The form contains the following elements:

- Block Name:** A text input field containing "Special Discounts".
- Page Type:** A dropdown menu currently showing "Customer Page Type".
- Block Type:** Three radio buttons labeled "Optional", "Default", and "Required". The "Optional" radio button is selected.
- Programs:** A "Find" button followed by a list box. To the right of the list box is a text note: "Deselecting an item in the control box removes the item from the block and causes it not to appear the next time the block is edited."
- Buttons:** "Save" and "Reset" buttons at the bottom of the form.

2. Enter the following parameters:

- **Block Name**

This is the name of the block that appears both in the **Edit Page Type** frame and on the visitor's home page.

- **Block Type**

You must choose one of the following for the block type:

- **Optional**

This block does not appear the first time the visitor logs onto the site, but the visitor can add this block to the home page. The visitor can also remove this block from the home page.

- **Default**

This block is displayed on the visitor's home page the first time the visitor logs in after being assigned to a user template. A default block is also displayed if the User Administrator has changed the visitor's user template, such as from Customer to Partner, when the visitor's old optional and default blocks are replaced by the default blocks for the new page type. The visitor can remove these blocks from the home page.

- **Required**

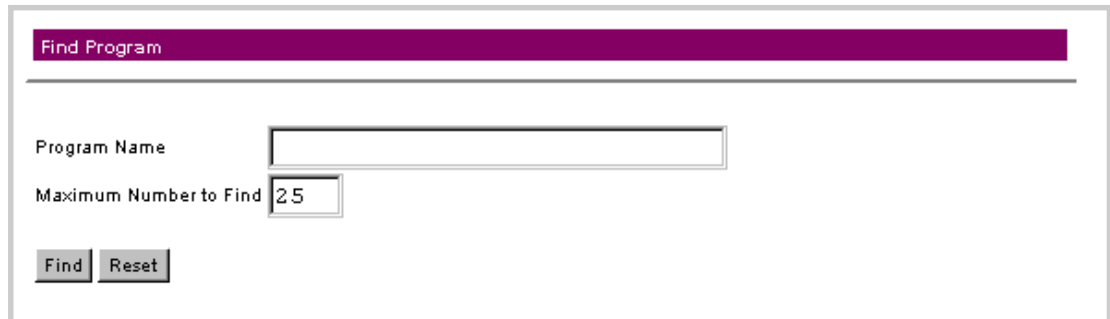
This block always appears on the visitor's home page when the visitor logs in. The visitor cannot remove this block from the home page.

The **Optional** and **Default** blocks are configurable by the visitor. The **Required** blocks are always displayed on the home page. Visitors can collapse but not remove a required block. Examples of

required blocks are the “CEO Announcements” and “Department News” blocks. New visitors see the required and default blocks when they first log in.

- **Programs**

To add an existing program to a block, click **Find**; a **Find Program** pop-up window appears.



The screenshot shows a pop-up window titled "Find Program" with a purple header. Below the header is a horizontal line. There are two input fields: "Program Name" with an empty text box, and "Maximum Number to Find" with a text box containing the number "25". At the bottom left, there are two buttons: "Find" and "Reset".

Enter the name of the program or a substring of the name in the **Program Name** box, then enter the maximum number of programs to be returned. To find all programs, leave the **Program Name**

box empty. To clear the form, click the **Reset** button; otherwise, click the **Find** button. The results appear with check boxes to the left.

The screenshot shows a web interface for selecting programs. At the top, there is a purple header with the text "List of Program" and a blue link "Search Again". Below this is a list of programs, each with an unchecked checkbox to its left. The programs listed are: Accessories, All Departments, All Employees, All Internet Guests, All Sales Employees, Antarctic Sales, Asia Pacific Product Releases, Competitive Analysis, Culture and Values, Culture et Valeurs, Data Sheets, European Product Releases, Events in France, Events in Germany, HTTP Portlet, Investor Relations, Jobs at Adventech, Kultur und Werte, Latest News, Latin American Product Releases, MRDs, Marketing, News in the UK, North American Product Releases, and PDAs. At the bottom of the list, there is a grey button labeled "Done".

You can also search for a different set of programs by clicking the **Search Again** link at the top of the form. Use the left mouse button to select the check boxes to the left of the program or programs you want to add to the available selection of programs, then click **Done** at the bottom of the form. All programs you checked appear as selected in the box to the right of the **Find** button and can be selected or deselected by using the left button on your mouse.

3. To clear the **Block Name** field and deselect all programs shown, click **Reset**. To save the block, click **Save**.

Editing blocks

The bottom half of the **Edit Page Type** frame contains the blocks associated with that page. Each page must have at least one block to be useful.

To edit a block for a page:

1. Click the **Edit** link next to the block name. A frame similar to the following appears:

The screenshot shows the 'Edit Block' interface. It includes a purple header bar labeled 'Edit Block'. Below this, the form contains the following elements:

- Block Name:** A text input field containing 'Special Discounts'.
- Page Type:** A dropdown menu currently set to 'Customer Page Type'.
- Block Type:** Three radio buttons: 'Optional' (which is selected), 'Default', and 'Required'.
- Programs:** A 'Find' button followed by a list box containing 'Antarctic Sales'. To the right of the list box is a note: 'Deselecting an item in the control box removes the item from the block and causes it not to appear the next time the block is edited.'
- Buttons:** 'Save' and 'Reset' buttons at the bottom center.

2. You can change the following parameters:

- **Block Name**

This is the name of the block that appears both in the **Edit Page Type** frame and on the visitor's home page.

- **Block Type**

You must choose one of the following for the block type:

- **Optional**

This block type does not appear the first time the visitor logs onto the site, but the visitor can add this block type to the home page. The visitor can also remove this block type from the home page.

- **Default**

This block type is displayed on the visitor's home page the first time the visitor logs in after being assigned to a user template. A default block type is also displayed if the User Administrator has changed the visitor's user template, such as from Customer to Partner, when the visitor's old optional and default block types are replaced by the default block types for the new page type. The visitor can remove these block types from the home page.

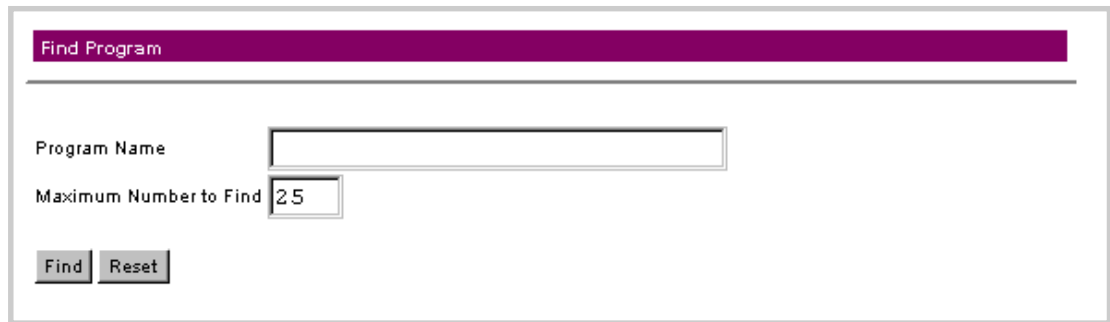
- **Required**

This block type always appears on the visitor's home page when the visitor logs in. The visitor cannot remove this block type from the home page.

- **Programs**

To add an existing program to a block:

- a. Click **Find**; a **Find Program** form appears.



The screenshot shows a web form titled "Find Program" with a purple header bar. Below the header, there are two input fields: "Program Name" and "Maximum Number to Find". The "Maximum Number to Find" field contains the value "25". At the bottom of the form, there are two buttons: "Find" and "Reset".

- b. Enter the name of the program or a substring of the name in the **Program Name** box, then enter the maximum number of programs to be returned. To find all programs, leave the **Program Name** box empty. Click **Find**. The results appear with check boxes to the left.

List of Program [Search Again](#)

Program

- Accessories
- All Departments
- All Employees
- All Internet Guests
- All Sales Employees
- Antarctic Sales
- Asia Pacific Product Releases
- Competitive Analysis
- Culture and Values
- Culture et Valeurs
- Data Sheets
- European Product Releases
- Events in France
- Events in Germany
- HTTP Portlet
- Investor Relations
- Jobs at Adventech
- Kultur und Werte
- Latest News
- Latin American Product Releases
- MRDs
- Marketing
- News in the UK
- North American Product Releases
- PDAs

Done

You can also search for a different set of programs by clicking the **Search Again** link at the top of the form.

- c. Use the left button on your mouse to select the check boxes to the left of the program or programs you want to add to the available selection of programs, then click **Done** at the bottom of the form.

All programs you checked appear as selected in the box to the right of the **Find** button and can be selected or deselected by using the left button on your mouse. To remove a program from a block, deselect it in the box to the right of **Programs**. The program will not show up in the list of programs in the **Programs** box the next time you edit the block.

3. To reset the **Block Name** field and select only the original programs shown, click **Reset**. To save the block, click **Save**.

Removing blocks

To remove a block, click the **[Delete]** link to the left of the block you wish to remove. A confirmation window appears; click **OK**. The block is then deleted from the page.

Removing a page type

To remove an existing page type, click the **[Delete]** link to the left of the page type you wish to remove. A confirmation window appears; click **OK**. The page type is then deleted, and the links to blocks associated with that page type are removed.

 You cannot delete a page type being used by a user template.

3

User Administration

This chapter explains how you create and configure user accounts for an InfoExchange Portal site.

The following topics are discussed in this chapter:

- [“Introduction,”](#) next
- [“Administering access groups”](#) on page 82
- [“Administering user templates”](#) on page 87
- [“Administering organizations”](#) on page 102
- [“Administering user accounts”](#) on page 109
- [“Administering a project collaboration page”](#) on page 126
- [“Administering closed-loop process management”](#) on page 165

Introduction

An *access group* grants privileges by Publishing Center content category to all visitors in that access group.

User Templates determine the default settings for a user account. These default settings include access groups, qualifiers, and home pages.

▶ You must create a user template before you can create any user accounts.

Organizations let you define a hierarchy of divisions, departments, groups, and so forth.

The terms *users* and *visitors* are used interchangeably by InfoExchange Portal to refer to the end-users of an InfoExchange Portal site. Each visitor accesses a site via his or her *user account*. This account sets a visitor’s user template, organizations, and administrative rights for channels and organizations.

The *project collaboration page* is a page created by an employee (such as a sales representative or an engagement manager) for sharing information about a project with fellow employees, customers, and partners. Using a project collaboration page, a group of people can follow, track, and share data about the project in its various phases.

Closed-loop process management changes the collaborative nature of enterprise relationship management by automatically tracking specific uses of an enterprise portal. The InfoExchange Portal closed-loop process management system enables visitors to track and manage action items, ticket items, or leads.

Administering access groups

An *access group* grants privileges by content category to all visitors in a group. An access group is defined by the name and the category access privileges it grants to its members. To grant visitors access privileges, you add them to the appropriate access groups.

▶ To administer access groups, you must be a BroadVision InfoExchange Portal [Site Admin](#) or [Service Admin](#) and a Publishing Center Administrator. The *Publishing Center User's Guide* has information on how to become a Publishing Center Administrator.

As a member of an access group, you have one of the following privileges for the content items in the categories associated with the access group:

Privileges to content	Definition
None	Grants no access to the content items in the categories and subcategories associated with the group
Read on-line	Grants read-only access to the on-line content items in the categories and subcategories associated with the access group.
Read	Grants read-only access to the content items in the categories and subcategories associated with the access group, regardless of the status of the items.
Write	Lets you add new content items to, modify existing items in, delete, and schedule the reclassification of the items in the categories and subcategories associated with the group.
Approve	Lets you change the status of content items, and schedule status changes in the future. Approval access also includes the Write access privileges.

To administer access groups, select **Access Groups** in the left frame. A display similar to the following appears in the right frame:

Click to add an access group — [Add Access Group](#)

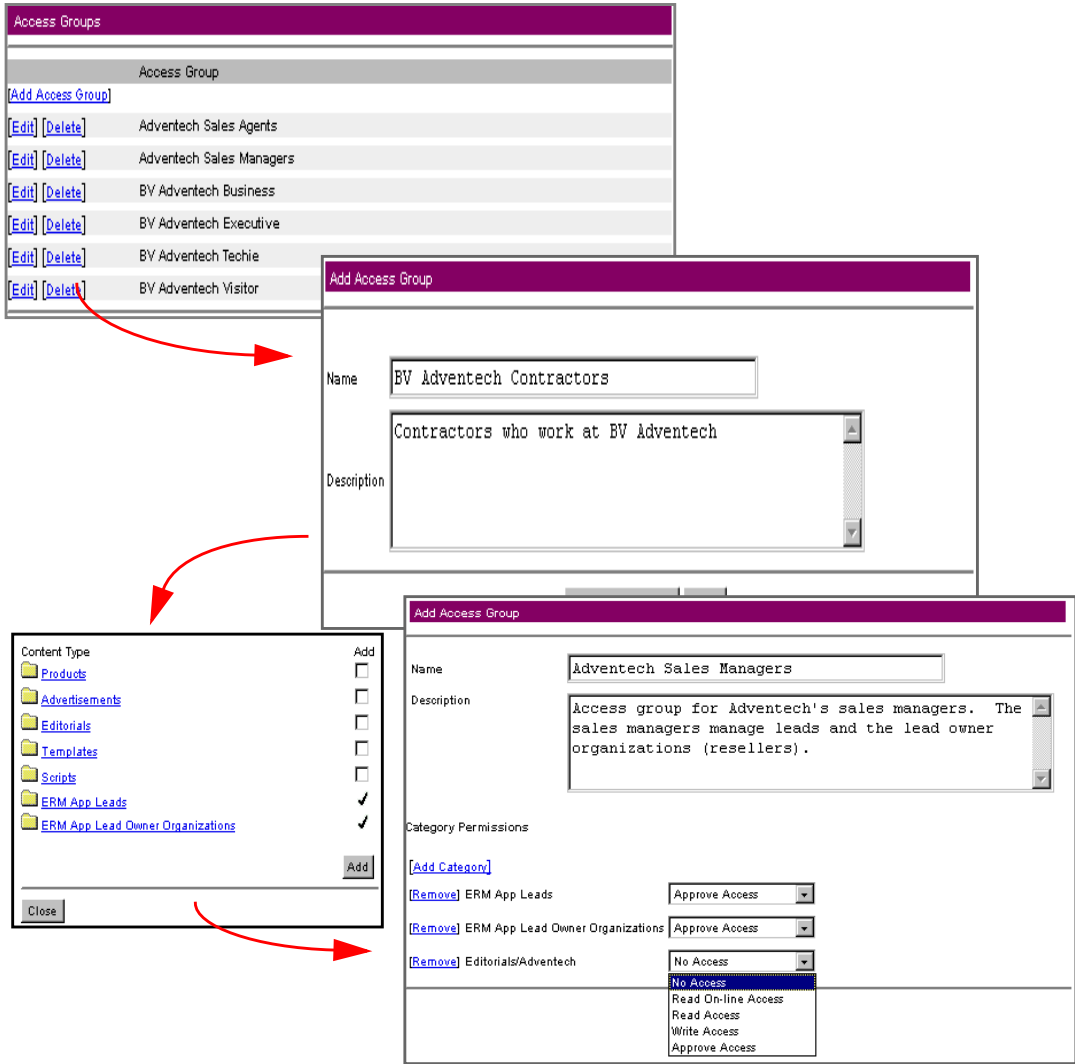
Click to edit an access group — [Edit](#) [Delete](#)

Click to delete an access group — [Edit](#) [Delete](#)

Access Group	
Adventech Sales Agents	Edit Delete
Adventech Sales Managers	Edit Delete
BV Adventech Business	Edit Delete
BV Adventech Executive	Edit Delete
BV Adventech Techie	Edit Delete
BV Adventech Visitor	Edit Delete

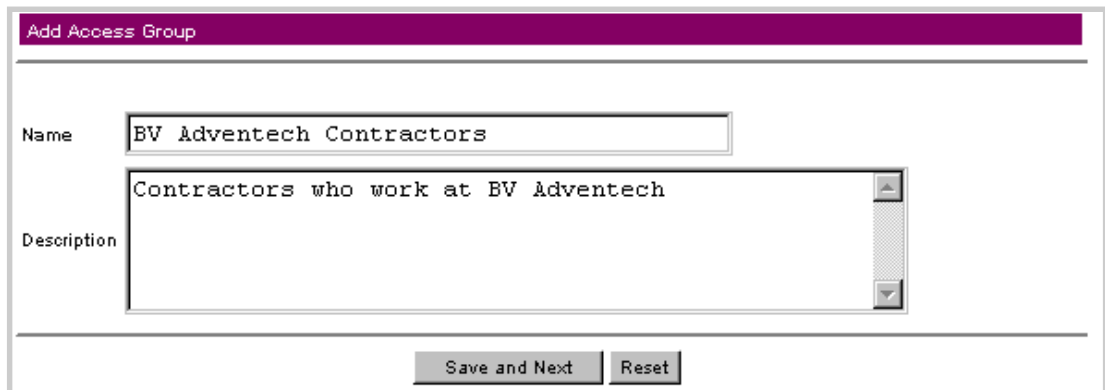
Creating access groups

An access group is defined by a name, description, and one or more categories with associated access privileges. You grant these privileges to InfoExchange Portal visitors by specifying which access groups they belong to when you create their user accounts.



Follow these instructions to create an access group:

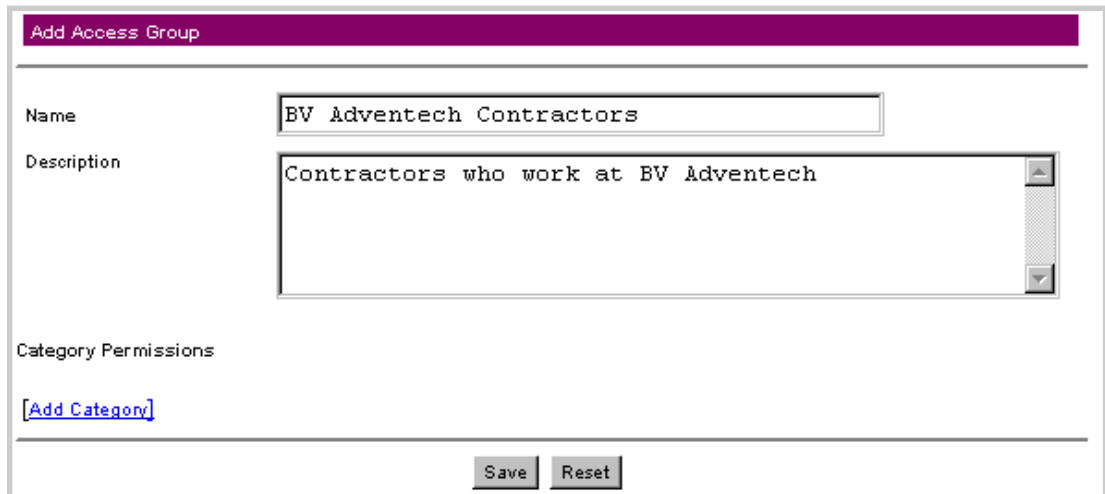
1. In the right frame, select the **Add Access Group** link.



The screenshot shows a web form titled "Add Access Group". It has a purple header bar with the title. Below the header, there are two input fields: "Name" and "Description". The "Name" field contains the text "BV Adventech Contractors". The "Description" field contains the text "Contractors who work at BV Adventech". At the bottom of the form, there are two buttons: "Save and Next" and "Reset".

2. In the first page of the **Add Access Group** form enter the **Name** (required) and a **Description** (optional) of the access group.

Click **Reset** if you want to clear the form; otherwise, click **Save and Next** to save the access group and open the next page of the **Add Access Group** form.



The screenshot shows the same "Add Access Group" form as above, but with an additional section below the description field. This section is titled "Category Permissions" and contains a blue link labeled "[Add Category]". At the bottom of the form, there are two buttons: "Save" and "Reset".

3. Add categories using the **[Add Category]** link under **Category Permissions** as discussed in **"Adding a category to an access group"** on page 86.
4. Choose privileges for each category as discussed in **Step 5** on page 87, then save your changes as discussed in **Step 6** on page 87.

▶ See the *Publishing Center User's Guide* for information on these permissions.

5. Click **Reset** if you want to clear the form; otherwise, click **Save** to save the changes.

Editing Access Groups

Follow these steps to edit an access group:

1. In the right frame, select the **Edit** link to the left of the access group you want to modify.

The screenshot shows the 'Edit Access Group' form. The 'Name' field contains 'Adventech Sales Managers'. The 'Description' field contains 'Access group for Adventech's sales managers. The sales managers manage leads and the lead owner organizations (resellers)'. Under 'Category Permissions', there are two entries: 'ERM App Leads' with a dropdown set to 'Approve Access', and 'ERM App Lead Owner Organizations' with a dropdown set to 'Approve Access'. There are 'Save' and 'Reset' buttons at the bottom.

2. In the **Edit Access Group** form enter the **Name** (required) and a **Description** (optional) of the access group.

▶ Permissions applied to a category apply to all its subcategories unless a different set of permissions is explicitly applied to a subcategory.

3. Add and remove categories, if desired, using the links under **Category Permissions** as discussed in [“Adding a category to an access group” on page 86](#) and [“Removing a category from an access group” on page 87](#).
4. Click **Reset** if you want to clear the form; otherwise, **Save** to save the access group.

Deleting access groups

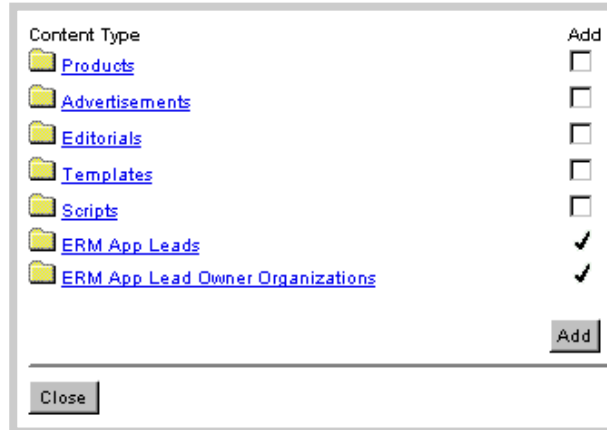
To delete an existing Access Group, click **Delete** to the left of the access group name.

A confirmation window appears. Click **OK** to remove the access group, or click **Cancel**.

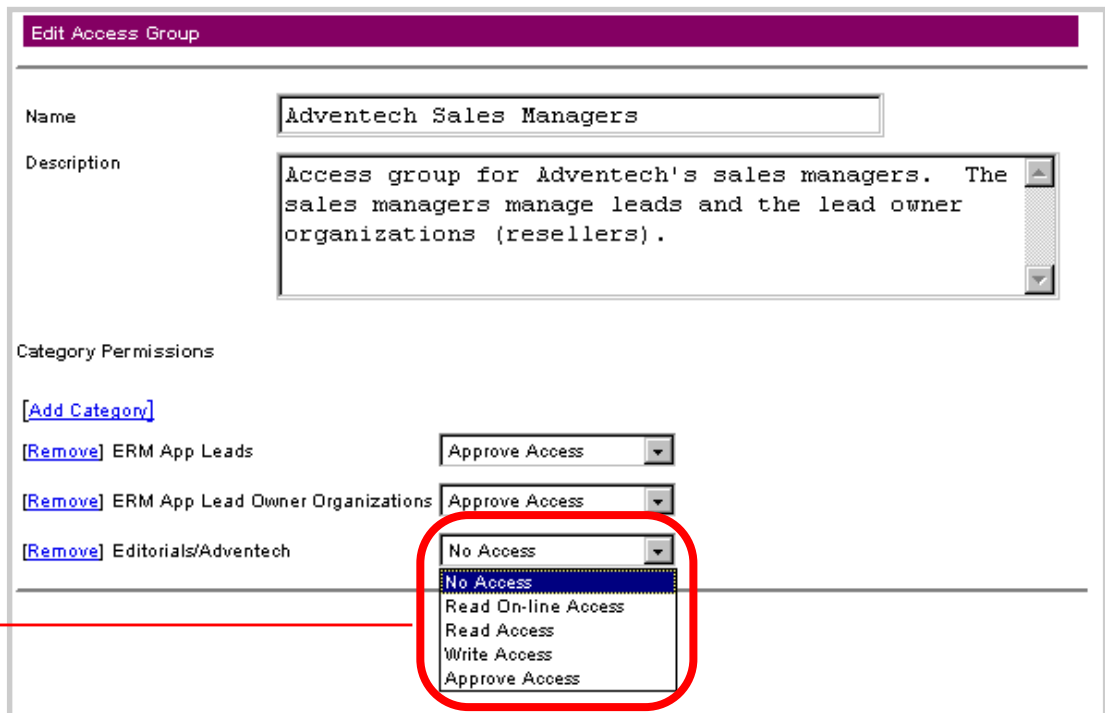
Adding a category to an access group

You can add and remove categories using the links under Category Permissions. To add a category:

1. In the **Add Access Group** or **Edit Access Group** window, click the **Add Category** link to open the **Add Category** dialog box.




2. Select the **Content Type** links to navigate through the available subcategories. Then click on the corresponding checkbox to the right of each category you want to add in the **Content Type** column.
3. Click the **Add** button to add the checked content types; click the **Close** button to close the **Content Type** pop-up window.
4. Click **Close** to return to the **Add Access Group** or the **Edit Access Group** form.



5. Make sure the privileges for each category listed are correct.

Choose one of the following category permissions from the menu to the right of the category:

- No Access
- Read On-line Access
- Read Access
- Write Access
- Approve Access

 See the *Publishing Center User's Guide* for information on these permissions.

6. Click Reset if you want to clear the form; otherwise, click Save to save the changes.

Removing a category from an access group

To remove a category click the Remove link to the left of the category name. A dialog appears prompting you with:

Are you sure you want to remove this permission?


Click OK to confirm, or click Cancel to return to the previous form.

Administering user templates

User templates determine the content visitors to a site can see by defining the page types for the visitor's home page, along with access groups and qualifiers for new user accounts assigned to that user template. A user template also determines the preset bookmarked channels, programs, and content. Click User Templates in the left frame to administer user templates.

This section contains information about:

- [Adding a user template](#)
- [Editing a user template](#)
- [Deleting a user template](#)

 BroadVision recommends you create a new user template for administrators, and then create at least one administrator account from that user template. See ["Editing a visitor's account" on page 118](#) for a description of the administrative functions and what it means to be a [Site Admin](#)

or [Service Admin](#). You must have the [Site Admin](#) or [Service Admin](#) administrative function to perform user template administration with the Admin Tool. See “[Administering user accounts](#)” on [page 109](#) for more information on setting up a [Site Admin](#) or [Service Admin](#) user account.

User Templates	
User Template	
Add User Template	
Edit Delete	Business
Edit Delete	Customer
Edit Delete	Executive
Edit Delete	Guest
Edit Delete	Manager
Edit Delete	Partner
Edit Delete	Techie
Edit Delete	Visitor

Adding a user template

To add a user template, click **Add User Template** at the top of the frame.

Add User Template

User Template Name:

Description:

Scripts

Personal Profile:

Matching Profile:

Status: On-line Off-line

Page Type:

Select Qualifiers

▶ When you save the specifications for the scripts and page types, all existing user accounts derived from the user template are adjusted accordingly.

In this example we add the user template Sanitation Engineer.

1. On the first page of the Add User Template form enter the **User Template Name** and optional **Description**.

▶ User template names must be unique.

2. In the **Scripts** section, enter the **Personal Profile**. This is the profile editor script used in the InfoExchange Portal site. All visitors assigned to the same user template share the same personal profile editor. The path of the script must be relative to the script-root. You can either enter it or use the scroll icon to navigate to the script's path relative to the script-root.
3. Still in the **Scripts** section, enter the **Matching Profile**. This is the matching attribute editor script used in the InfoExchange Portal site. All visitors assigned to the same user template share the same matching attribute editor. The path of the script must be relative to the script-root. You can either enter it or use the scroll icon to navigate to the script's path relative to the script-root.
4. For **Status**, choose either on-line (user accounts assigned this template can log into the InfoExchange Portal site) or off-line (cannot login).
5. In the **Page Type** drop-down list choose the page type. This is the type of page displayed when a user account assigned to that user template logs into the InfoExchange Portal site. The page type defines the script used as the "home page" for the visitor and the blocks and programs on the home page.
6. **Select Qualifiers** enables you to restrict which channels, programs, and content items a visitor can see. In some cases a visitor can also be permitted to select his or her own values for some qualifiers.

▶ If no qualifiers have been defined, the **Qualifiers** lists do not appear, and no values can be selected for the user template.

- a. Click **Find** under **Select Qualifiers**; a pop-up window appears in which you can view the list of qualifiers in the service in groups of ten.


The screenshot shows a web interface titled "List of Qualifiers". It features a search bar with a "Search" button. Below the search bar is a list of qualifiers, each with a checkbox and a label: "Account Level", "Department", "Industry Type", "Language", "Number of Employees", "Partner Type", "Region", and "Role". At the bottom of the window, there are links for "Check All" and "Clear All", a status indicator "showing 1-8 of 8", and "Done" and "Cancel" buttons.

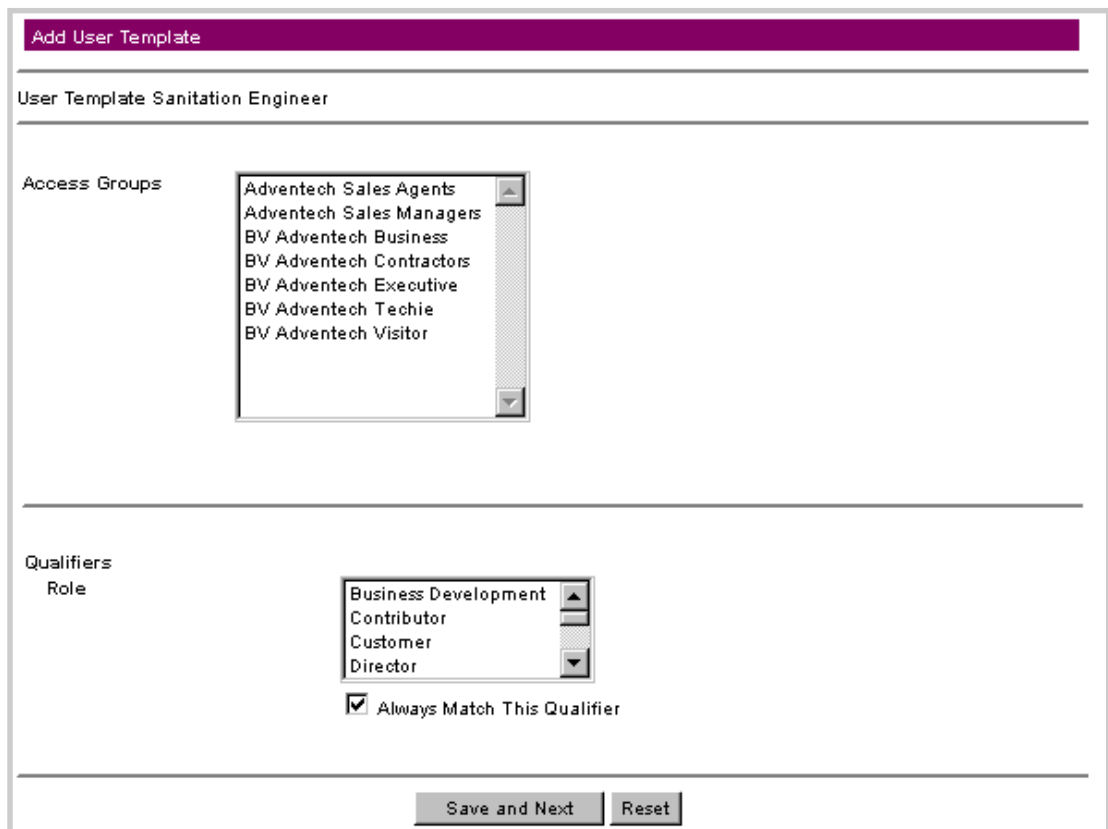
- b. To find the qualifiers you want to add:

- Enter a string in the Search box to return a list of qualifiers with names that contain the search string
 - Select a letter under the Search box to retrieve all qualifiers that begin with that letter, or select All to retrieve all qualifiers.
- c. Select the box next to each qualifier you want to select, select Check All to select all listed qualifiers, or select Clear All to deselect all listed qualifiers. When you have finished selecting qualifiers, click the Done box.

The qualifiers shown in the box to the right of the Find button are now assigned to the user template.

If you need to undo your changes, click the Reset button. When you are finished with the first page, click the Next button to continue.

 Your changes are not made until you click Save and Next on the next page.



8. Choose one or more Access Groups from the list box. Access groups are created using the InfoExchange Portal Admin Tool or the Publishing Center’s administrative functionality. If the Access Groups listbox in Add User Template is empty, no access groups have been created. Selecting an access group and saving adds all users of that user template to that access group. Deselecting an access group and saving removes all users of that user template from that access group.
9. Qualifiers further enable you to restrict which visitors can see a particular channel or program. You can pick as many or few as you wish from the scrolling lists. This display shows the qualifiers defined for the site and the values defined for each qualifier. You can select any or all

qualifier values for the user template using the left mouse button to select one, the shift key with the left mouse button to select multiple qualifier values, and the Control key with the left mouse button to deselect qualifier values.

To set all qualifier values, including ones added later, check the **Always Match This Qualifier** box.

A visitor sees a channel or program when a selected value in a qualifier of a channel or program matches a selected value in the qualifier of the visitor's user account settings.

Initial settings of qualifier values come from the user template; when a user account is created, that visitor automatically inherits settings from the user template. A [Site Admin](#) or [Service Admin](#) can override all settings for any visitor at any time; an administrator of an organization can override settings for any visitor within that organization. Only site qualifiers marked **Allow Visitors to Edit All Values** appear in a visitor's profile editor, enabling the visitor to modify the selected values. The initial settings from the user template are the default settings for the user account. See "[Administering qualifiers](#)" on [page 12](#) for the settings for marking **Allow Visitors to Edit All Values**.

If no qualifiers have been defined for the site, the **Qualifiers** lists do not appear and you cannot select values.

10. If you need to undo your changes, click Reset. When you are finished with this page, click Save and Next to continue.

The screenshot shows a web form titled "Add User Template" with a purple header. The form is for a "User Template Sanitation Engineer". It contains three sections for selecting preset bookmarked items:

- Select the preset bookmarked Channels.** This section has a "Find" button and a listbox. A note to the right states: "Deselecting an item in the control boxes on this page removes the item from the user template and causes it not to appear the next time the user template is edited."
- Select the preset bookmarked Programs.** This section has a "Find" button and an empty listbox.
- Select the preset bookmarked content.** This section has a "Content Type" dropdown menu set to "Products", a "Find" button, and an empty listbox.

A "Save" button is located at the bottom right of the form.

11. On the third page of the Add User Template form Select the preset bookmarked Channels. Click the Find button to add values to the listbox.
 - a. A Find Channel pop-up box appears.

- b. Enter the name of the channel or a substring of the name in the **Channel Name** box, then enter the maximum number of channels to be returned. To find all channels, leave the **Channel Name** box empty. Click **Find**. The results appear with check boxes to the left.

List of Channels [Search Again](#)

Channel
<input type="checkbox"/> /Collateral
<input type="checkbox"/> /Corporate
<input type="checkbox"/> /Corporate/Case Studies
<input type="checkbox"/> /Corporate/From The CEO
<input type="checkbox"/> /Corporate/Working at Adventech
<input type="checkbox"/> /Customers
<input type="checkbox"/> /News
<input type="checkbox"/> /News/Company News
<input type="checkbox"/> /News/Company News/Engineering
<input type="checkbox"/> /News/Company News/ESTaff only
<input type="checkbox"/> /News/Company News/HR Policies
<input type="checkbox"/> /News/Company News/Marketing and Sales
<input type="checkbox"/> /News/Regional News
<input type="checkbox"/> /News/Regional News/Asia Pacific News
<input type="checkbox"/> /News/Regional News/European News
<input type="checkbox"/> /News/Regional News/North American News
<input type="checkbox"/> /Portlets
<input type="checkbox"/> /Products
<input type="checkbox"/> /Products/Product Announcements
<input type="checkbox"/> /Tools

Done Cancel

- c. Click on the check boxes to select channels to add to the available selection of channels, then click **Done** at the bottom of the form. All channels you checked appear as selected in the **Select the preset bookmarked Channels** box and can be selected or deselected.
12. To Select the preset bookmarked Programs, choose one or more from the scrolling list or click **Find**; a **Find Program** form appears.

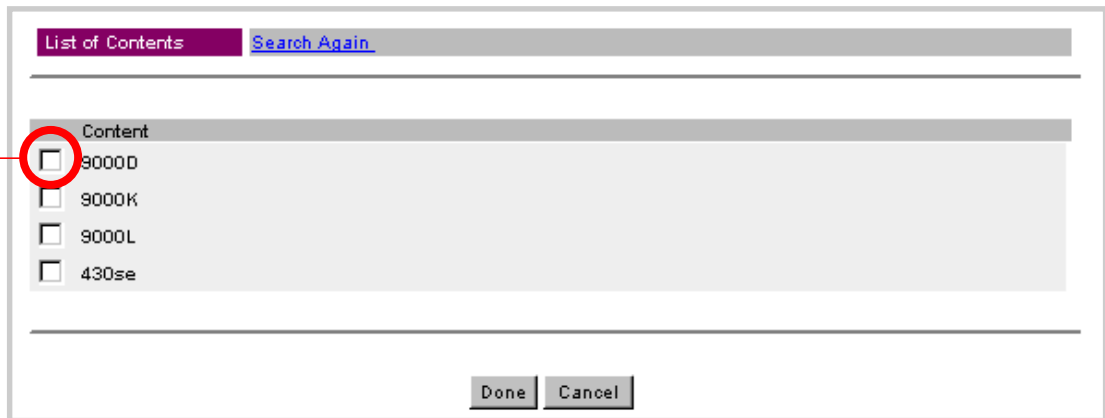
- a. Enter the name of the program or a substring of the name in the Program Name box, then enter the maximum number of programs to be returned. To find all programs, leave the Program Name box empty. Click Find. The results appear with check boxes to the left.

The screenshot shows a dialog box titled "List of Programs" with a "Search Again" button. The main area contains a list of programs, each with a checkbox to its left. The programs listed are: Accessories, All Departments, All Employees, All Internet Guests, All Sales Employees, Antarctic Sales, Asia Pacific Product Releases, Competitive Analysis, Culture and Values, Culture et Valeurs, Data Sheets, European Product Releases, Events in France, Events in Germany, HTTP Portlet, Investor Relations, Jobs at Adventech, Kultur und Werte, Latest News, Latin American Product Releases, MRDs, Marketing, News in the UK, North American Product Releases, and PDAs. At the bottom of the dialog are "Done" and "Cancel" buttons.

- b. Click the check boxes to select programs to add to the available selection of programs, then click Done at the bottom of the form. All programs you checked appear as selected in the Select the preset bookmarked Programs box and can be selected or deselected using the left mouse button.
13. To Select the preset bookmarked content, choose one or more from the scrolling list or click the Find button.
- a. Use the pull-down menu to the right of the Content Type box to select the content type.
 - b. Click Find; a Find Content window appears.

- c. Enter the name of the content item or a substring of the name in the Name box, or to return all content items, leave the Name box empty. Click Find. The results appear in the List of Contents window.

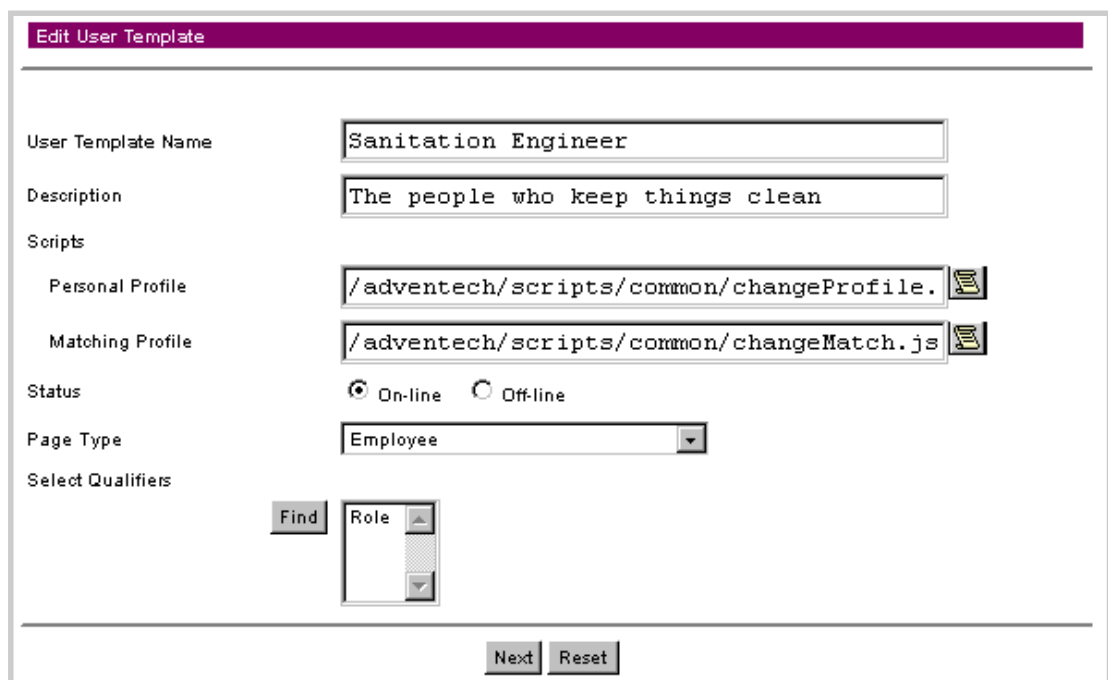
Click to select item as preset bookmarked content



- d. Click the check boxes to select the content items in the List of Contents box to add them to the list of preset bookmarked contents box in the Add User Template window, then click Done. The added items appear in the Find Content window. All content items you checked appear as selected in the Select the preset bookmarked content box and can be selected or deselected using the left mouse button
- e. Click Save to save the user template.

Editing a user template

To change the details of an existing user template, click Edit to the left of its name in the User Templates list.



▶ When you save the specifications for the scripts, page types, and access groups, all user accounts of the user template are adjusted accordingly, however, changes to the qualifier values do not affect the qualifiers assigned to individual visitors.

Here you can alter any of the following in the first page of the Edit User Template form:

1. The User Template Name field and optional Description field. Note that user template names must be unique.
2. In the Scripts section, the Personal Profile and Matching Profile. The former is the profile editor script used in the InfoExchange Portal site; the latter is the matching attribute editor script used in the InfoExchange Portal site. All visitors assigned to the same user template share the same personal profile editor and matching attribute editor. The path of both scripts must be relative to the script-root. You can either enter a path or use the scroll icon to navigate to the script's path relative to the script-root.
3. For Status, you can change between on-line (user accounts assigned this template can log into the InfoExchange Portal site) or off-line (cannot login).
4. In the Page Type drop-down list choose the page type. This is the type of page displayed when a user account assigned to that user template logs into the InfoExchange Portal site. The page type defines the script used as the "home page" for the visitor and the blocks and programs on the home page.
5. Select Qualifiers enables you to restrict which channels and programs a visitor can see. In some cases a visitor can also be permitted to select his or her own values of some qualifiers.

- ▶ If no qualifiers have been defined, the Qualifiers lists do not appear, and no values can be selected for the user template.
- a. Click Find under Select Qualifiers; a pop-up window appears in which you can view the list of qualifiers in the service in groups of ten.

The screenshot shows a dialog box titled "List of Qualifiers". At the top, there is a search bar with a "Search" button. Below the search bar is a list of qualifiers, each with a checkbox. The qualifiers listed are: Account Level, Department, Industry Type, Language, Number of Employees, Partner Type, Region, and Role. The "Role" qualifier is marked as "Selected". At the bottom of the dialog, there are "Check All" and "Clear All" links, and a status indicator "showing 1-8 of 8". Below the list of qualifiers, there is a section titled "Selected Qualifiers" which shows "Role" with a checked checkbox. At the very bottom, there are "Done" and "Cancel" buttons.

To find the qualifiers you want to add:

- Enter a string in the Search box to return a list of qualifiers with names that contain the search string.
 - Select a letter under the Search box to retrieve all qualifiers that begin with that letter, or select All to retrieve all qualifiers.
- b. Select the box next to each qualifier you want to select or deselect, select Check All to select all listed qualifiers, or select Clear All to deselect all listed qualifiers. When you have finished selecting qualifiers, click Done. For information about adding, editing, and removing organizations, see [“Administering organizations” on page 102.](#)
- c. In the box to the right of the Find button, use the left mouse button to highlight the qualifiers you want to assign to the user template.

▶ If you need to undo your changes, click Reset. When you are finished with the first page, click Next to continue. Note that your changes are not made until you click Save and Next on the next page.

On the second page of the Edit User Template form you can change the following:

7. You can choose another one of the Access Groups from the list box. Access Groups are created using the InfoExchange Admin Tool or the Publishing Center’s admin functionality. If the Access Group listbox in Edit User Template is empty, no access groups have been created. Selecting an access group and saving adds all users of that user template to that access group. Deselecting an access group and saving removes all users of that user template from that access group.

▶ When you change the access groups in a user template, visitors currently logged on are affected immediately.

8. **Qualifiers** further enable you to restrict which visitors can see a particular channel or program. You can pick as many or few as you wish from the scrolling lists. This display shows the qualifiers defined for the site and the values defined for each qualifier. Use the left mouse button to select and deselect qualifiers, or to enable all values that are ever assigned to the qualifier, select the box to the left of **Always Match This Qualifier**.

A visitor sees a channel or program when a selected value in a qualifier of a channel or program matches a selected value in the qualifier of the visitor's user account settings.

Initial settings of qualifier values come from the user template; when a user account is created, that visitor automatically inherits settings from the user template. A [Site Admin](#) or [Service Admin](#) can override all settings for any visitor at any time; an administrator of an organization can override settings for any visitor within that organization. Only site qualifiers marked **Allow Visitors to Edit All Values** appear in a visitor's profile editor, enabling the visitor to modify the selected values. The initial settings from the user template are the default settings for the user account. See "[Administering qualifiers](#)" on page 12 for the settings for marking **Allow Visitors to Edit All Values**.

If no qualifiers have been defined for the site, the **Qualifiers** lists do not appear and you cannot select values.

9. If you need to undo your changes, click Reset. When you are finished with this page, click Save and Next to continue.

The screenshot shows the 'Edit User Template' interface for a user named 'Sanitation Engineer'. The page is divided into three sections for selecting preset bookmarked content:

- Select the preset bookmarked Channels:** A 'Find' button is next to a list box containing '/Corporate/Working at Adventech'. A note to the right states: 'Deselecting an item in the control boxes on this page removes the item from the user template and causes it not to appear the next time the user template is edited.'
- Select the preset bookmarked Programs:** A 'Find' button is next to a list box containing 'All Internet Guests', 'Jobs at Adventech', and 'Latest News'.
- Select the preset bookmarked content:** A 'Content Type' dropdown menu is set to 'Products'. A 'Find' button is next to a list box containing '9000D (Products)'.

A 'Save' button is located at the bottom right of the form.

10. On the third page of the Edit User Template form, Select the preset bookmarked channels to add or remove bookmarked channels.
 - a. Click Find; a Find Channel form appears.

- b. Enter the name of the channel or a substring of the name in the **Channel Name** box, then enter the maximum number of channels to be returned. To find all channels, leave the **Channel Name** box empty. Click **Find**. The results appear with check boxes to the left.

The screenshot shows a window titled "List of Channels" with a "Search Again" link. Below the title bar is a list of channels, each with a checkbox to its left. The channels listed are:

- /Collateral
- /Corporate
- /Corporate/Case Studies
- /Corporate/From The CEO
- /Corporate/Working at Adventech
- /Customers
- /News
- /News/Company News
- /News/Company News/Engineering
- /News/Company News/ESTaff only
- /News/Company News/HR Policies
- /News/Company News/Marketing and Sales
- /News/Regional News
- /News/Regional News/Asia Pacific News
- /News/Regional News/European News
- /News/Regional News/North American News
- /Portlets
- /Products
- /Products/Product Announcements
- /Tools

At the bottom of the dialog are "Done" and "Cancel" buttons.

- c. Click on the check boxes to select channels to add to the available selection of channels, then click **Done** at the bottom of the form. All channels you checked appear as selected in the **Select the preset bookmarked Channels** box and can be selected or deselected.
11. To Select the preset bookmarked Programs, choose one or more from the scrolling list or click **Find**; a **Find Program** form appears.

- a. Enter the name of the program or a substring of the name in the **Program Name** box, then enter the maximum number of programs to be returned. To find all programs, leave the **Program Name** box empty. Click **Find**. The results appear with check boxes to the left.

List of Programs [Search Again](#)

Program
<input type="checkbox"/> Accessories
<input type="checkbox"/> All Departments
<input type="checkbox"/> All Employees
<input type="checkbox"/> All Internet Guests
<input type="checkbox"/> All Sales Employees
<input type="checkbox"/> Antarctic Sales
<input type="checkbox"/> Asia Pacific Product Releases
<input type="checkbox"/> Competitive Analysis
<input type="checkbox"/> Culture and Values
<input type="checkbox"/> Culture et Valeurs
<input type="checkbox"/> Data Sheets
<input type="checkbox"/> European Product Releases
<input type="checkbox"/> Events in France
<input type="checkbox"/> Events in Germany
<input type="checkbox"/> HTTP Portlet
<input type="checkbox"/> Investor Relations
<input type="checkbox"/> Jobs at Adventech
<input type="checkbox"/> Kultur und Werte
<input type="checkbox"/> Latest News
<input type="checkbox"/> Latin American Product Releases
<input type="checkbox"/> MRDs
<input type="checkbox"/> Marketing
<input type="checkbox"/> News in the UK
<input type="checkbox"/> North American Product Releases
<input type="checkbox"/> PDAs

Done **Cancel**

- b. Click the check boxes to select programs to add to the available selection of programs, then click **Done** at the bottom of the form. All programs you checked appear as selected in the **Select the preset bookmarked Programs** box and can be selected or deselected using the left mouse button.
12. To Select the preset bookmarked content, choose one or more from the scrolling list or click the **Find** button.
 - a. Use the menu to the right of the **Content Type** box to select the content type.
 - b. Click **Find**; a **Find Content** window appears.

- c. Enter the name of the content item or a substring of the name in the Name box, or to return all content items, leave the Name box empty. Click Find. The results appear in the List of Contents window.




- d. Click the check boxes to select the content items in the List of Contents box to add them to the list of preset bookmarked contents box in the Edit User Template window, then click Done to save your changes. The added items appear in the Find Content window. All content items you checked appear as selected in the Select the preset bookmarked content box and can be selected or deselected using the left mouse button
 - e. Click Save to save the User Template.
13. Click Save to save your changes to the user template.

Deleting a user template

You may sometimes need to delete a user template from InfoExchange.

1. Click Delete to the left of a user template name to delete it.
2. You are then asked for confirmation before the user template is deleted; click OK. Note that deleted user templates cannot be “undeleted.”

 You cannot delete a user template while visitors are assigned to that user template.

Administering organizations

An organization usually represents a formal business unit, such as a department or a division. However, an organization can also represent a special project that is not part of the normal, long-term organizational structure of the company. Visitors can belong to more than one organization. Visitors in a higher level organization usually approve purchases for visitors in the organizations immediately below them.

This section covers the following topics:

- [“Browsing the organization hierarchy,”](#) next
- [“Adding an organization”](#) on page 104
- [“Editing an organization”](#) on page 106

- “Deleting an organization” on page 109

Browsing the organization hierarchy

A corporate account consists of a top-level organization with other corporate organizations underneath. A company’s organization can be graphically depicted as a hierarchical tree structure with boxes representing different organizations and lines showing reporting relationships between those organizations.

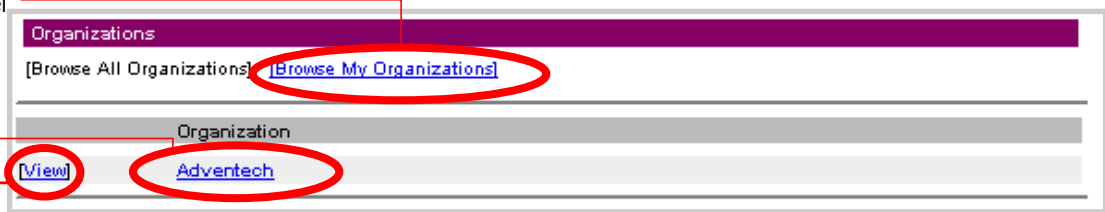
Although all visitors can view the organizational structure, only organization managers can create, update, or delete an organizational structure. When a [Site Admin](#) or [Service Admin](#) creates a corporate account, the Admin Tool automatically creates the top-level organization for the account. The organization manager then sets up the suborganizations and visitors underneath this top-level organization. Visitors can view organizations by the hierarchal tree structure or by an alphabetized listing.

To view your organization’s hierarchy, first select **Organizations** in the left menu. In the right frame the Organizations window appears with your top-level organization and an [Edit](#) link to its left. If you do not have [Site Admin](#) or [Service Admin](#) privileges but can administer an organization, the [\[Browse My Organization\]](#) link appears; select it to list the top-levels of the organizations you can administer.

Click to list the top-level organizations I can administer

Click to navigate down this organization

Click to view this organization



Select the top-level organization name to navigate to the organizations underneath it.

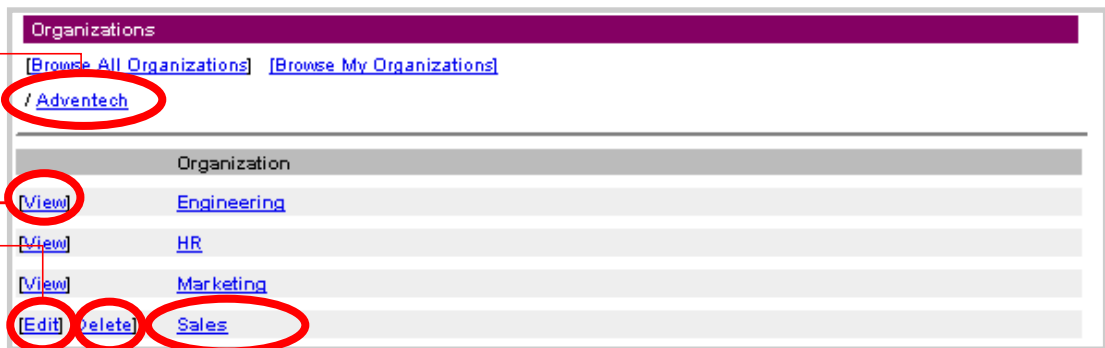
Click to navigate up a level

Click to view an organization you cannot administer

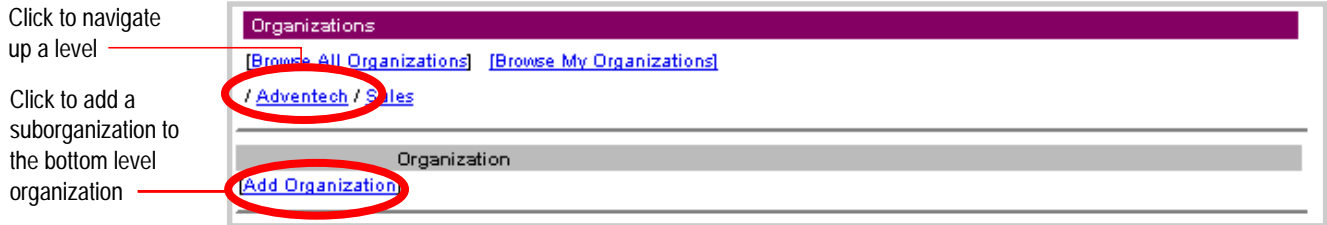
Click to edit this organization

Click to delete this organization

Click to navigate down a level



Continue navigating down organization levels until you see the [Add Organization] link, then select it. A screen similar to the following appears:



Here you can:

- Select an organization name to navigate to any organizations underneath it.
- Select the **Add Organization** link to add a suborganization.
- Select the **Edit** link to the left of an organization to change the Organization Name, Organization Code, or select administrators of the organization.
- Select the name of the previous top-level organization to go up one level.
- Select [Browse All Organizations] to return to the top-level organization.
- Select [Browse My Organizations] to return to the top-level organizations you can administer.

Adding an organization

To add an organization:

1. Navigate down the organization tree to the level at which you want to add an organization.
2. Select the **Add Organization** link to add a suborganization. In this example we add the suborganization North America to the organization /Root/Adventech/Sales.

The screenshot shows the "Add Organization" form. At the top is a purple header bar with the text "Add Organization". Below the header is a breadcrumb trail: "/ Root / Adventech / Sales". The form contains three input fields: "Organization Name" with the value "North America", "Organization Code" with the value "North America", and "Select Administrators" which is a dropdown menu with a "Find" button and the names "robyn" and "suzannah" visible. At the bottom of the form are two buttons: "Save" and "Reset".

3. Enter the following fields:

- **Organization Name** - The title of the organization.
- **Organization Code** - A text string denoting the code for the organization.

- **Select Administrators** - Select the visitors who can administer this organization:
Click the **Find** button. A **List of Users** pop-up window appears.

List of Users		
	Login Name	Name
<input checked="" type="checkbox"/>	fuzzball	Fuzzball White
<input checked="" type="checkbox"/>	suzannah	Suzannah Sales Manager

4. Enter a string in the **Search** box to return a list of user accounts with names that contain the search string.
5. Enter the maximum number of user accounts to be returned in the **Maximum Number to Find** box. To find all user accounts, leave the **Search** box empty.
6. To the right of **Search String**, choose one of the following radio buttons:
 - **At beginning of login name or full name.**
 - **Anywhere in login name or full name.**

Searching from the beginning of the name is faster than searching for the string anywhere in the name because the former has to search fewer characters in the database.

7. Click the Find box. The results appear in the List of Users pop-up window.

List of Users

Search

Maximum Number to Find

Search String

At beginning of login name or full name.

Anywhere in login name or full name.

	Login Name	Name
<input type="checkbox"/>	cesar	Cesar Customer
<input type="checkbox"/>	dave	Dave Enport
<input type="checkbox"/>	don	Don Ation
<input type="checkbox"/>	evan	Evan Tuly
<input type="checkbox"/>	fuzzball	Fuzzball White
<input type="checkbox"/>	joe	Joe Vial
<input type="checkbox"/>	lin	Lin Den
<input type="checkbox"/>	lisa	Lisa Truck
<input type="checkbox"/>	martha	Martha Marketer
<input type="checkbox"/>	mat	Mat Erial

[Check All](#) - [Clear All](#) showing 1-10 of 16 | [Next](#)

Selected Users

robyn	Robyn Reseller
suzannah	Suzannah Sales Manager

8. Check to select additional visitors who can administer the specified organization, or select the check box again to remove the visitor from the list of administrators for the organization. Note that more than one visitor can administer an organization. If no check box appears next to a visitor's name, this administrator is inherited from a higher level organization and cannot be removed at this level.

To undo your changes, click **Reset**. When you are finished with the page, click **Save** to save the new organization.

Editing an organization

To edit an organization:

1. Navigate down the organization tree to the level at which you can access the organization you want to edit.

2. Select the Edit link to the left of the organization name. A form similar to the following appears:

Organization Name: North America

Organization Code: North America

Select Administrators: Find [robyn, suzannah]

Save Reset

3. You can modify any of the following fields:

- Organization Name - The title of the organization.
- Organization Code - A text string denoting the code for the organization.
- Select Administrators - Select the visitors who can administer this organization:
Click the Find button. A List of Users pop-up window appears.

Search []

Maximum Number to Find: 25

Search String: At beginning of login name or full name.
 Anywhere in login name or full name.

	Login Name	Name
<input checked="" type="checkbox"/>	fuzzball	Fuzzball White
<input checked="" type="checkbox"/>	suzannah	Suzannah Sales Manager

Selected Users

Done Cancel

4. Enter a string in the Search box to return a list of user accounts with names that contain the search string.
5. Enter the maximum number of user accounts to be returned in the Maximum Number to Find box. To find all user accounts, leave the Search box empty.

6. To the right of Search String, choose one of the following radio buttons:

- At beginning of login name or full name.
- Anywhere in login name or full name.

Searching from the beginning of the name is faster than searching for the string anywhere in the name because the former has to search fewer characters in the database.

7. Click the Find box. The results appear in the List of Users pop-up window.

List of Users

Search

Maximum Number to Find

Search String At beginning of login name or full name.
 Anywhere in login name or full name.

	Login Name	Name
<input type="checkbox"/>	cesar	Cesar Customer
<input type="checkbox"/>	dave	Dave Enport
<input type="checkbox"/>	don	Don Ation
<input type="checkbox"/>	evan	Evan Tuly
<input type="checkbox"/>	fuzzball	Fuzzball White
<input type="checkbox"/>	joe	Joe Vial
<input type="checkbox"/>	lin	Lin Den
<input type="checkbox"/>	lisa	Lisa Truck
<input type="checkbox"/>	martha	Martha Marketer
<input type="checkbox"/>	mat	Mat Erial

[Check All](#) - [Clear All](#) showing 1-10 of 16 | [Next](#)

Selected Users

robyn	Robyn Reseller
suzannah	Suzannah Sales Manager

8. Check to select additional visitors who can administer the specified organization, or select the check box again to remove the visitor from the list of administrators for the organization. Note that more than one visitor can administer an organization. If no check box appears next to a visitor's name, this administrator is inherited from a higher level organization and cannot be removed at this level.

To undo your changes, click Reset. When you are finished with the page, click Save to save your changes to the organization.

Deleting an organization

You may sometimes need to delete an organization from InfoExchange Portal.


1. Select [Delete] to the left of an organization name to delete it.
2. You are then asked for confirmation before the organization is deleted; click OK. Note that deleted organizations cannot be “undeleted.”

Administering user accounts

The content users of InfoExchange Portal see is based in part on the information defined in their accounts. Using the Admin Tool, you can add or remove a visitor, see his or her administrative privileges in the site (if any), and assign his or her user template.

This section discusses the following topics:

- [“Adding a user account” on page 111](#)
- [“Finding existing user accounts” on page 116](#)
- [“Editing a visitor’s account” on page 118](#)
- [“Changing a visitor’s profile” on page 124](#)

 To perform user account administration with the Admin Tool, you need to have the [Site Admin](#) or [Service Admin](#) administrative function.

CAUTION The Admin Tool has `ieadmin` as the default site administrator with the default password `imieadmin`. BroadVision recommends you use this account to set up the first user account. *Change the password on this account to prevent break-ins to your system!* To change this password you must be a [Site Admin](#); because the `ieadmin` account is not assigned to a specific service, you must select Entire Site to the right of Search Within. See [“Finding existing user accounts” on page 116](#) contains information on obtaining a list of visitors; [“Editing a visitor’s account” on page 118](#) contains information on how to change a password.

To add or edit a user account, click Users in the left frame. The following form appears in the right frame:

The screenshot shows a web form titled "Users" with a purple header bar. The form contains the following elements:

- An [\[Add User\]](#) link, circled in red.
- A "User Name" text input field, circled in red.
- A "Maximum Number to Find" text input field containing the value "25", circled in red.
- A "Search String" section with two radio button options: "At beginning of login name or full name." (selected) and "Anywhere in login name or full name.", both circled in red.
- A "Search Within" section with two radio button options: "Current service." (selected) and "Entire site.", both circled in red.
- "Find" and "Reset" buttons at the bottom left.

Annotations on the left side of the form:

- "Click to add a user account" points to the [\[Add User\]](#) link.
- "Enter search string (optional)" points to the "User Name" input field.
- "Enter maximum number of results to return" points to the "Maximum Number to Find" input field.
- "Select one to determine how the search is performed" points to the "Search String" radio buttons.
- "Select one to choose whether to search only within this service or within the entire site" points to the "Search Within" radio buttons.

▶ You cannot delete a user account using the InfoExchange Portal Admin Tool. To remove a user account from the database, you must edit the database using SQL.

Adding a user account

To add a user account, click the [Add User] at the top of the frame. The Add User form appears.

Add User

Login Name:

Password:

Verify Password:

Name:

Active:

Receive E-mail Alerts:

Administrative Functions:

- Site Admin
- Service Admin
- Publishing Center User
- Project Admin
- Lead Owner Admin

Select Organization:

Select Channels user can administer:

Select Organizations user can administer:

User Template:

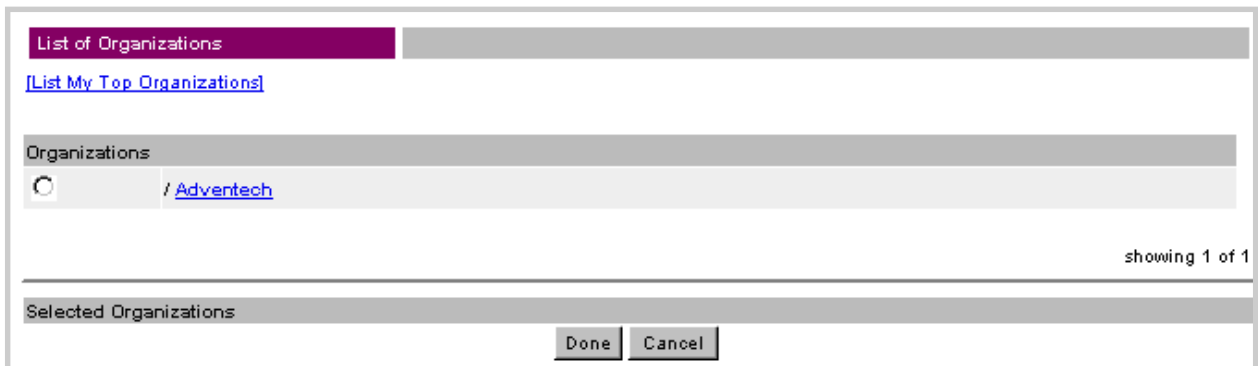
Select Qualifiers:

Use the Add User form to specify the visitor’s account information. The first page of the form sets:

1. Login Name
2. Password
3. Name
4. Status as Active (can log into an InfoExchange Portal site) or inactive (unchecked)
5. Receive E-mail Alerts (receives e-mail notifications for program and content alerts); if not checked, the visitor can still view the triggered program and content alerts in the alerts inbox
6. Administrative Functions in InfoExchange Portal and Publishing Center

Site Admin	Can perform all administrative tasks in any service.
Service Admin	Can perform all administrative tasks only for this service.
Publishing Center User	Can log into the Publishing Center.
Project Admin	Can create and administer a project collaboration page. See “Administering a project collaboration page” on page 126 for details.
Lead Owner Admin	Can administer lead owner organizations. See “Administering closed-loop process management” on page 165, ” for details.

7. Select Organization enables you to set the organization for this visitor.
 - a. Click Find under Select Organization; a pop-up window appears in which you can navigate through the list of organizations in the service by selecting an organization name. Select List My Top Organizations to view only the top-level organizations you can administer.



- b. Select the radio button next to the organization you want to assign to the visitor, then click Done. For information about adding, editing, and removing an organization, see [“Administering organizations” on page 102.](#)
8. Select Channels user can administer enables you to set the channels for this visitor.

- a. Click Find under Select Channels user can administer; a pop-up window appears in which you can navigate through the list of channels and subchannels in the service by selecting a channel name. Select List My Top Channels to view only those channels you can administer.

List of Channels

[\[List My Top Channels\]](#)

Search

Maximum Number to Find

Channels	
<input type="radio"/>	/ Collateral
<input type="radio"/>	/ Customers
<input type="radio"/>	/ News
<input type="radio"/>	/ Portlets
<input type="radio"/>	/ Products
<input type="radio"/>	/ Tools

showing 1-6 of 6

Selected Channels

- b. Select the check box next to the channels you want to enable the visitor to administer, then click Done. For information about adding, editing, and removing channels, see [“Administering channels” on page 28](#).
 - c. In the box to the right of the Find button, use the left mouse button to highlight the channels you want the visitor to be able to administer.
9. Select Organizations user can administer enables you to set the organizations this visitor can administer. To enable this visitor to administer one or more organizations:
 - a. Click Find under Select Organizations user can administer; a pop-up window appears in which you can navigate through the list of organizations in the service by selecting the organization name. Select List My Top Organizations to view only those organizations to which you belong.

List of Organizations

[\[List My Top Organizations\]](#)

[/ Adventech / Engineering](#)

Organizations	
<input type="checkbox"/>	PDAs
<input checked="" type="checkbox"/>	Servers
<input type="checkbox"/>	Workstations

[Check All](#) - [Clear All](#)

showing 1-3 of 3

Selected Organizations

- b. Select the check box next to each organization you want to enable the visitor to administer, then click Done. For information about adding, editing, and removing organizations, see “Administering organizations” on page 102.

▶ A visitor can administer organizations without being a member of them.

- 10. User Template sets the default user account settings; these determine what content the visitor can see. When you assign a visitor to a different user template, the visitor’s access group membership and qualifiers are reset to those of the new user template. Select a user template for the visitor from the list in the pull-down menu. See “Administering user templates” on page 87 for information on adding and editing user templates.

▶ When you select a visitor’s user template, you are also indirectly assigning the visitor a page type. A page type contains default blocks; these default blocks are assigned to the new visitor. The visitor sees the home page and all preset bookmarked channels, programs, and content items of the user template.

- 11. Select Qualifiers enables you to restrict which channels and programs a visitor can see. In some cases a visitor can also be permitted to set his or her own values for some qualifiers.

▶ If no qualifiers have been defined, the Qualifiers lists do not appear, and no values can be selected for that visitor account.

- a. Click Find under Select Qualifiers; a pop-up window appears in which you can view the list of qualifiers in the service in groups of ten.

The screenshot shows a window titled "List of Qualifiers". At the top, there is a search bar with a "Search" button. Below the search bar, there are navigation links: "All", "A", "B", "C", "D", "E", "F", "G", "H", "I", "J", "K", "L", "M", "N", "O", "P", "Q", "R", "S", "T", "U", "V", "W", "X", "Y", "Z". The main content area is a table with the following rows:

Qualifiers	
<input type="checkbox"/>	Account Level
<input type="checkbox"/>	Department
<input type="checkbox"/>	Industry Type
<input type="checkbox"/>	Language
<input type="checkbox"/>	Number of Employees
<input type="checkbox"/>	Partner Type
<input type="checkbox"/>	Region
<input type="checkbox"/>	Role

At the bottom left of the table area, there are links for "Check All" and "Clear All". At the bottom right, it says "showing 1-8 of 8". Below the table, there is a section labeled "Selected Qualifiers" which is currently empty. At the very bottom, there are "Done" and "Cancel" buttons.

To find the qualifiers you want to add:

- Enter a string in the Search box to return a list of qualifiers with names that contain the search string
- Select a letter under the Search box to retrieve all qualifiers that begin with that letter, or select All to retrieve all qualifiers.

- b. Select the box next to each qualifier you want to select, select Check All to select all listed qualifiers, or select Clear All to deselect all listed qualifiers. When you have finished selecting qualifiers, click Done. For information about adding, editing, and removing organizations, see [“Administering organizations” on page 102](#).

▶ Initial settings of qualifier values come from the user template; when a user account is created, that visitor automatically inherits settings from the user template. A [Site Admin](#) or [Service Admin](#) can override all settings for any visitor at any time. Only site qualifiers marked **Allow Visitors to Edit All Values** appear in a visitor’s profile editor, enabling the visitor to modify the selected values. The initial settings from the user template are the defaults. See [“Administering qualifiers” on page 12](#) for information about marking qualifiers with **Allow Visitors to Edit All Values**.

A visitor sees a channel or program when a selected value in a qualifier of a channel or program matches a selected value in the qualifier of the visitor’s user account settings.

To undo your changes, click **Reset**. When you are finished with the first page, click **Next** to continue. Note that your changes are not made until you click **Save** on the next page.

The screenshot shows a web form titled "Add User". The form is divided into several sections. At the top, there is a purple header bar with the text "Add User". Below this, there is a section labeled "User ed" with a text input field. The next section is "Access Groups", which contains a listbox with the following items: Adventech Sales Agents, Adventech Sales Managers, BV Adventech Business, BV Adventech Contractors, BV Adventech Executive, BV Adventech Techie (highlighted in blue), and BV Adventech Visitor. Below the "Access Groups" section is a section labeled "Qualifiers". This section has a "Role" label and a listbox with the following items: Business Development, Contributor, Customer, and Director. Below the "Role" listbox is a checkbox labeled "Always Match This Qualifier" which is checked. At the bottom of the form, there are two buttons: "Save" and "Reset".

12. Select **Access Groups** enables you to set the Publishing Center access groups for this visitor. Use the left mouse button to select and deselect access groups.

▶ **Access Groups** are created either using the Publishing Center’s administrative functionality or in InfoExchange Portal by a visitor who is either a [Site Admin](#) or [Service Admin](#) and is also a [Publishing Center User](#). These access groups determine the visitor’s level of access for reading and publishing content. If the **Access Group** listbox in the **Add User** frame is empty, no access groups have been created using the Publishing Center.

13. **Qualifiers** enables you to assign values to the selected qualifiers, thus restricting which channels and programs a visitor can see. Use the left mouse button to select and deselect qualifiers, or to enable all values that are ever assigned to the qualifier, select the box to the left of **Always Match This Qualifier**.

▶ Selecting all the qualifier values listed is not the same as selecting **Always Match This Qualifier**. When you select the qualifier values listed, values added to the qualifier later do not apply to the visitor, whereas when you select **Always Match This Qualifier**, all future values assigned to the qualifier will apply to the visitor.

To undo your changes, click **Reset**. When you are finished with the page, click **Save** to save the new user account.

Finding existing user accounts

To find existing user accounts:

The screenshot shows a web interface titled 'Users' with a purple header. Below the header is a link '[Add User]'. The main form contains the following fields and options:

- User Name**: A text input field, circled in red.
- Maximum Number to Find**: A text input field containing '25', circled in red.
- Search String**: Two radio button options: 'At beginning of login name or full name.' (selected) and 'Anywhere in login name or full name.' (circled in red).
- Search Within**: Two radio button options: 'Current service.' (selected) and 'Entire site.' (circled in red).
- At the bottom are 'Find' and 'Reset' buttons.


Annotations on the left side of the form:

- 'Enter search string (optional)' points to the User Name field.
- 'Enter maximum number of results to return' points to the Maximum Number to Find field.
- 'Select one to determine how the search is performed' points to the Search String radio buttons.
- 'Select one to choose whether to search only within this service or within the entire site' points to the Search Within radio buttons.

1. Enter all or part of the visitor's name or login name in the **User Name** box. To list the first N of all the user accounts where N is the maximum number of results to be returned, leave the **User Name** field empty.
2. Enter the maximum number of results to be returned in the **Maximum Number to Find** box. The search is case-sensitive.
3. To the right of **Search String**, select whether the Admin Tool searches for results beginning with the string or including the string by choosing either "At beginning of login name or full name." or "Anywhere in login name or full name."

▶ Selecting "At beginning of login name or full name." performs a faster search than selecting "Anywhere in login name or full name."

- To the right of Search Within, select whether the Admin Tool searches for results from just this service or from the entire site by choosing either “Current service.” or “Entire site.”

 To access the `iepadmin` user account you must search with the “Entire site.”

The results appear as the List of Users.

Click to add a user account

[\[Add User\]](#)

Click to edit the Login Name, Password, Organizations, Access Groups, User Template, Qualifiers, Qualifier Values, and Channels and Organizations the visitor can administer.

[\[Settings\]](#) [\[Profile\]](#)

Click to change the name, address, city, state, zip code, and e-mail address of the visitor who accesses this user account

[\[Settings\]](#) [\[Profile\]](#)

List of Users			
	Login Name	Name	Active
[Add User]			
[Settings] [Profile]	cesar	Cesar Customer	✓
[Settings] [Profile]	dave	Dave Enport	✓
[Settings] [Profile]	don	Don Ation	✓
[Settings] [Profile]	evan	Evan Tuly	✓
[Settings] [Profile]	fuzzball	Fuzzball White	✓
[Settings] [Profile]	joe	Joe Vial	✓
[Settings] [Profile]	lin	Lin Den	✓
[Settings] [Profile]	lisa	Lisa Truck	✓
[Settings] [Profile]	martha	Martha Marketer	✓
[Settings] [Profile]	mat	Mat Erial	✓
[Settings] [Profile]	miles	Miles Manager	✓
[Settings] [Profile]	phil	Phil Osophy	✓
[Settings] [Profile]	robyn	Robyn Reseller	✓
[Settings] [Profile]	sara	Sara SalesRep	✓
[Settings] [Profile]	sid	Sid Silicon	✓
[Settings] [Profile]	suzannah	Suzannah Sales Manager	✓
[Settings] [Profile]	teri	Teri Tester	✓

Editing a visitor's account

To edit a visitor's login name or password, make the account active or inactive, enable or disable e-mail alerts, or change the account's user template, organizations, access groups, qualifiers, or change the channels and organizations the visitor can administer, click **Settings** in the row that contains the user account name.

The screenshot shows the 'Edit User' form with the following fields and values:

- Login Name:** dave
- Password:** (empty)
- Verify Password:** (empty)
- Name:** Dave Enport
- Active:**
- Receive E-mail Alerts:**
- Administrative Functions:**
 - Site Admin
 - Service Admin
 - Publishing Center User
 - Project Admin
 - Lead Owner Admin
- Select Organization:** /Adventech
- Select Channels user can administer:** /Customers
- Select Organizations user can administer:** (empty)
- User Template:** Partner
- Select Qualifiers:** Industry Type, Language, Partner Type, Region

Buttons: Find, Next, Reset

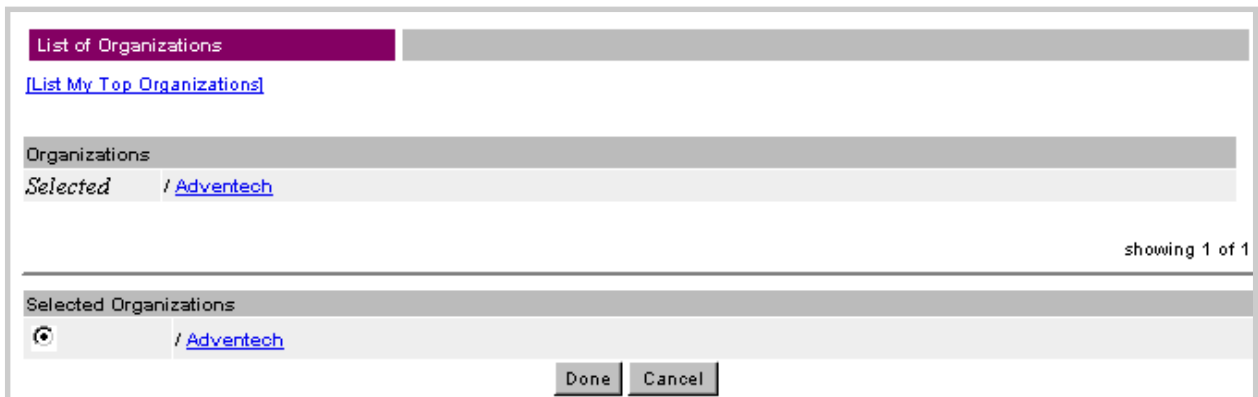
Use the Edit User forms to change the user account information.

The first page of the form sets:

1. Login Name
2. Password
3. Name
4. Status as Active (can log into an InfoExchange Portal site) or inactive (unchecked)
5. Receive E-mail Alerts (receives e-mail notifications for program and content alerts); if not checked, the visitor can still view the triggered program and content alerts in the alerts inbox
6. Administrative Functions in InfoExchange Portal and Publishing Center:

Site Admin	Can perform all administrative tasks in any service.
Service Admin	Can perform all administrative tasks only for this service.
Publishing Center User	Can log into Publishing Center.
Project Admin	Can create and administer a project collaboration page. See “Administering a project collaboration page” on page 126 for details.
Lead Owner Admin	Can administer lead owner organizations. See “Administering closed-loop process management” on page 165 for details.

7. Select Organization enables you to change the organization for this visitor.
 - a. Click Find under Select Organization; a pop-up window appears in which you can navigate through the list of organizations in the service. Select List My Top Organizations to view only those organizations to which you belong.



- b. Select the radio button next to the organization you want to assign to the visitor, then click Done. For information about adding, editing, and removing an organization, see [“Administering organizations” on page 102](#).
8. Select Channels user can administer enables you to add or remove channels for this visitor.

- a. Click Find under Select Channels user can administer; a pop-up window appears in which you can navigate through the list of channels and subchannels in the service. Select List My Top Channels to view only those channels you can administer.

List of Channels

[\[List My Top Channels\]](#)

Search

Maximum Number to Find

Channels	
<input type="checkbox"/>	/ Collateral
<input type="checkbox"/>	/ Corporate
<input checked="" type="checkbox"/>	/ Customers
<input type="checkbox"/>	/ News
<input type="checkbox"/>	/ Portlets
<input type="checkbox"/>	/ Products
<input type="checkbox"/>	/ Tools

[Check All](#) - [Clear All](#) showing 1-7 of 7

Selected Channels

<input checked="" type="checkbox"/>	/ Customers
-------------------------------------	-----------------------------

- b. Select the check box next to the channels you want to enable the visitor to administer, then click Done. For information about adding, editing, and removing channels, see [“Administering channels” on page 28](#).
9. Select Organizations user can administer enables you to add or remove organizations this visitor can administer.
 - a. Click Find under Select Organizations user can administer; a pop-up window appears in which you can navigate through the list of organizations in the service by selecting the organization name. Select List My Top Organizations to view only those organizations you can administer.

List of Organizations

[\[List My Top Organizations\]](#)

[/ Adventech](#) / [Engineering](#)

Organizations	
<input type="checkbox"/>	PDAs
<input checked="" type="checkbox"/>	Servers
<input type="checkbox"/>	Workstations

[Check All](#) - [Clear All](#) showing 1-3 of 3

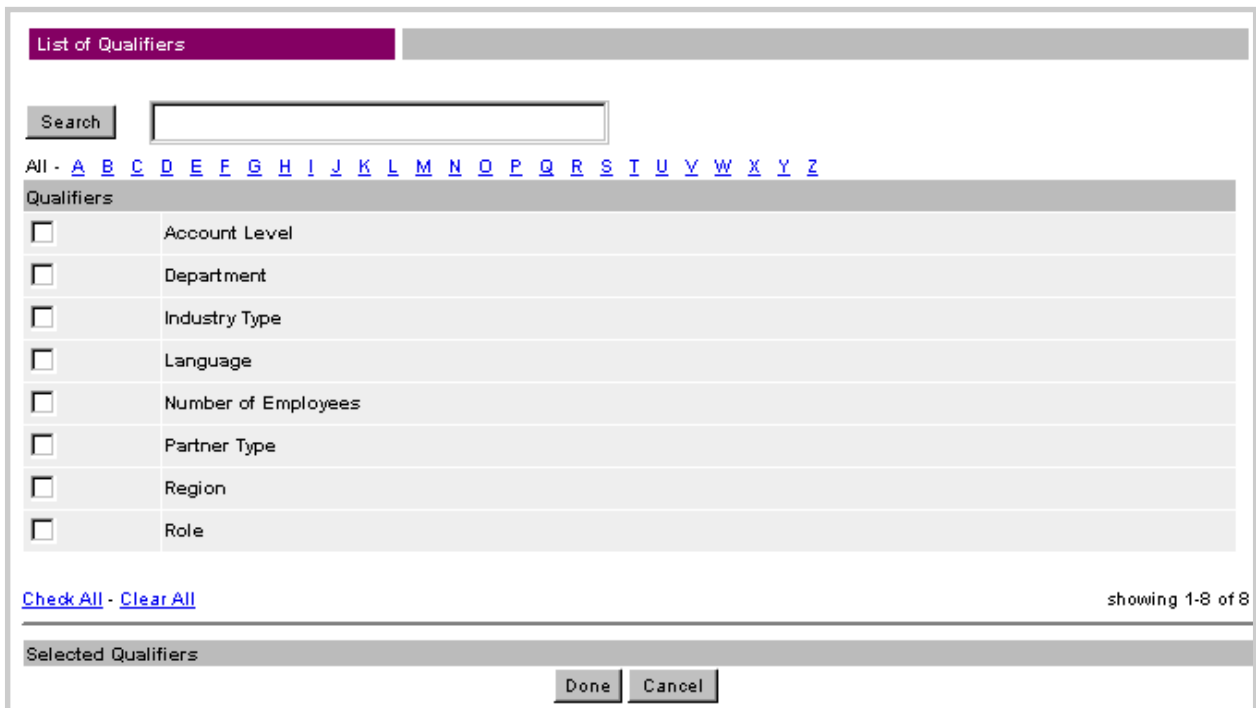
Selected Organizations

<input checked="" type="checkbox"/>	Servers
-------------------------------------	-------------------------

- ▶ A visitor can administer organizations without being a member of them.
 - b. Select the check box next to the organizations you want to enable the visitor to administer, then click **Done**. For information about adding, editing, and removing organizations, see [“Administering organizations” on page 102](#).

- 10. **User Template** sets the default user account settings; these determine what content the visitor can see. When you assign a visitor to a different user template, the visitor’s access group membership and qualifiers are reset to those of the new user template. Select a user template for the visitor from the list in the menu box. See [“Administering user templates” on page 87](#)” for information on adding and editing user templates.
 - ▶ When you select a visitor’s user template, you are also indirectly assigning the visitor a page type. A page type contains default blocks; these default blocks are assigned to the new visitor. The visitor sees the home page and all preset bookmarked channels, programs, and content items of the user template.


- 11. **Select Qualifiers** enables you to restrict which channels and programs a visitor can see. In some cases a visitor can also be permitted to administer some qualifiers.
 - ▶ If no qualifiers have been defined, the Qualifiers lists do not appear, and no values can be selected for that visitor account.
 - a. Click **Find** under **Select Qualifiers**; a pop-up window appears in which you can view the list of qualifiers in the service in groups of ten.



To find the qualifiers you want to add or remove:

- Enter a string in the Search box to return a list of qualifiers with names that contain the search string
- Select a letter under the Search box to retrieve all qualifiers that begin with that letter, or select **All** to retrieve all qualifiers.

- b. Select the box next to each qualifier you want to select, select the box next to each selected qualifier to deselect it, select Check All to select all listed qualifiers, or select Clear All to deselect all listed qualifiers. When you have finished selecting qualifiers, click Done. For information about adding, editing, and removing organizations, see [“Administering organizations” on page 102](#).
- c. In the box to the right of the Find button, use the left mouse button to highlight the qualifiers you want to assign to the visitor.

 Initial settings of qualifier values come from the user template. When the user template is changed, all settings for the visitor change, and the visitor automatically inherits qualifier settings from the user template. A [Site Admin](#) or [Service Admin](#) can override all settings for any visitor at any time. Only site qualifiers marked **Allow Visitors to Edit All Values** appear in a visitor’s profile editor, enabling the visitor to modify the selected values. The initial settings from the user template are the defaults. See [“Administering qualifiers” on page 12](#) for information about marking qualifiers with **Allow Visitors to Edit All Values**.

A visitor sees a channel or program when a selected value in a qualifier of a channel or program matches a selected value in the qualifier of the visitor’s user account settings.

To undo your changes, click Reset. When you are finished with the first page, click Next to continue. Note that your changes are not made until you click Save on the next page.

Edit User

User dave

Access Groups

- Adventech Sales Agents
- Adventech Sales Managers
- BV Adventech Business
- BV Adventech Contractors
- BV Adventech Executive
- BV Adventech Techie
- BV Adventech Visitor

Qualifiers

Industry Type

- Government
- High-Tech
- Publishing
- Telecom

Always Match This Qualifier

Language

- English
- French
- German
- Spanish

Always Match This Qualifier

Partner Type

- Integrator
- OEM
- Reseller
- Strategic

Always Match This Qualifier

Region

- Asia Pacific
- Europe
- Latin America
- North America

Always Match This Qualifier

Role

- Business Development
- Contributor
- Customer
- Director

Always Match This Qualifier

Save Reset

The second page of the Edit User form lets you modify the following values:

1. **Access Groups** enables you to set the Publishing Center access groups for this visitor. Use the left mouse button to select and deselect access groups.

▶ **Access Groups** are created either using the Publishing Center’s administrative functionality or in InfoExchange Portal by a visitor who is either a **Site Admin** or **Service Admin** and is also a **Publishing Center User**. These access groups determine the visitor’s level of access for reading and publishing content. If the **Access Group** listbox in the **Edit User** frame is empty, no access groups have been created using the Publishing Center.

2. **Qualifiers** enables you to assign values to the selected qualifiers, thus restricting which channels and programs a visitor can see. Use the left mouse button to select and deselect qualifiers, or to enable all values that are ever assigned to the qualifier, select the box to the left of **Always Match This Qualifier**.

▶ Selecting all the qualifier values listed is not the same as selecting **Always Match This Qualifier**. When you select the qualifier values listed, values added to the qualifier later do not apply to the visitor, whereas when you select **Always Match This Qualifier**, all future values assigned to the qualifier will apply to the visitor.

To undo your changes, click **Reset**. To undo your changes, click **Reset**. When you are finished with the second page, click **Save** at the bottom of the page to save changes made on both pages of the form.

Changing a visitor’s profile

To change the visitor’s profile information:

1. Find existing user accounts:

The screenshot shows a web interface titled "Users" with a purple header bar. Below the header is a link "[Add User]". The main form contains the following fields and options:


- User Name**: A text input field, circled in red.
- Maximum Number to Find**: A text input field containing "25", circled in red.
- Search String**: Two radio button options: "At beginning of login name or full name." (selected, circled in red) and "Anywhere in login name or full name." (unselected).
- Search Within**: Two radio button options: "Current service." (selected, circled in red) and "Entire site." (unselected).
- At the bottom are "Find" and "Reset" buttons.

Annotations on the left side of the screenshot point to these elements:

- "Enter search string (optional)" points to the User Name field.
- "Enter maximum number of results to return" points to the Maximum Number to Find field.
- "Select one to determine how the search is performed" points to the Search String radio buttons.
- "Select one to choose whether to search only within this service or within the entire site" points to the Search Within radio buttons.

- a. Enter all or part of the visitor’s name or login name in the **User Name** box. To list the first *N* of all the user accounts where *N* is the maximum number of results to be returned, leave the **User Name** field empty.

- b. Then enter the maximum number of results to be returned in the **Maximum Number to Find** box. The search is case-sensitive.
- c. To the right of **Search String**, select whether the Admin Tool searches for results beginning with the string or including the string by choosing either “**At beginning of login name or full name.**” or “**Anywhere in login name or full name.**”

 Selecting “**At beginning of login name or full name.**” performs a faster search than selecting “**Anywhere in login name or full name.**”

- d. To the right of **Search Within**, select whether the Admin Tool searches for results from just this service or from the entire site by choosing either “**Current service.**” or “**Entire site.**”

The results appear as the List of Users.

Click to change the name, address, city, state, zip code, and e-mail address of the visitor who accesses this user account

List of Users			
	Login Name	Name	Active
[Add User]			
[Settings] [Profile]	cesar	Cesar Customer	✓
[Settings] [Profile]	dave	Dave Enport	✓
[Settings] [Profile]	don	Don Ation	✓
[Settings] [Profile]	evan	Evan Tuly	✓
[Settings] [Profile]	fuzzball	Fuzzball White	✓
[Settings] [Profile]	joe	Joe Vial	✓
[Settings] [Profile]	lin	Lin Den	✓
[Settings] [Profile]	lisa	Lisa Truck	✓
[Settings] [Profile]	martha	Martha Marketer	✓
[Settings] [Profile]	mat	Mat Erial	✓
[Settings] [Profile]	miles	Miles Manager	✓
[Settings] [Profile]	phil	Phil Osophy	✓
[Settings] [Profile]	robyn	Robyn Reseller	✓
[Settings] [Profile]	sara	Sara SalesRep	✓
[Settings] [Profile]	sid	Sid Silicon	✓
[Settings] [Profile]	suzannah	Suzannah Sales Manager	✓
[Settings] [Profile]	teri	Teri Tester	✓

2. Click **Profile** to the left of the visitor whose profile you want to edit.



Edit Profile	
Name	Dave Enport
Address	Two Embarcadero Center
City	San Francisco
State	CA
Zip	94111-3800
E-mail Address	denport@bvadventech.com

Save Reset

The **Edit Profile** form is a script, `userprofupdate.jsp`, that can be modified to include additional user profile attributes. This script, like all the Admin Tool scripts, is located in the `script_root/knowledge/admin/scripts` directory.

3. Make any changes you want to make to the profile.
4. To undo your changes, click the **Reset** button; otherwise click the **Save** button to save your changes.

Administering a project collaboration page

Project collaboration allows a group of people to follow, track, and share data about a project.

The *project collaboration page* is a page created by an employee (such as a sales representative or an engagement manager) for sharing information about a project with fellow employees, customers, and partners. A project collaboration page pertains to a single project, and the life cycle of that project contains one or more phases. Multiple phases can be in progress simultaneously. Information that can be shared about a project includes tasks, meetings, and announcements.

Discussion groups allow the project participants to freely exchange ideas. Files can be attached to messages posted to a discussion group. The messages in the discussion groups are threaded. Visitors who belong to a *project group* see all of the project collaboration content tagged for that project group in the projects for which they are registered participants.

When someone creates a project collaboration page using the project collaboration page wizard, the wizard automatically creates a public discussion group open to all participants in that project group. A project owner can add more discussion groups by clicking **Discussions** in the project collaboration page.

Using a project collaboration page

The project collaboration page has two types of users: owners and participants.

The owners of a project can:

- add and remove participants from the collaboration's community.
- add and remove users from the list of owners.
- mark participants that go into the contact list.
- attach an image file for the collaboration page.
- add and delete discussion groups.
- moderate discussion groups.
- add and delete phases in the collaboration. Note that deleting a phase deletes all associated tasks, meetings, and announcements.
- delete a collaboration. Note that deleting a collaboration deletes all the phases for that collaboration.
- mark which phase is the current phase. All participants see that phase initially when they go to the project collaboration page.
- associate products with the collaboration and dissociate products from the collaboration.
- associate programs with phases of the collaboration and dissociate those programs from the collaboration.

Participants in a project collaboration can:

- read, add, and edit projects, phases, tasks, meetings, and announcements.
- add messages to and read discussion groups.

Participants are assigned to different groups within a project. The default group is "Public"; all participants are members of the "Public" group. You can create additional groups for the project, such as "Guests", "Private", or "Customers".

Authorizing project collaboration page access

The [Site Admin](#) or [Service Admin](#) authorizes who can create a project collaboration page. Typically a limited set of employees are authorized to create a project collaboration page. Other levels of access to parts of a project depend on the visitor's access level.

The following access privileges relate to tasks:

- A project owner can edit and delete tasks.
- A task owner can edit his/her tasks.
- A participant in a project group can view tasks in that group.
- A visitor not in a project group cannot access tasks assigned to that project group.

The following access privileges relate to meetings:

- A project owner can edit and delete any meeting.
- A meeting owner can edit and delete his/her meeting.

Only a project owner or announcement author can edit or delete an announcement.

Only project owners can add, edit, or delete discussion groups and phases as well as attach or detach programs and products.

To change authorization of a visitor:

1. Select Users in the left menu of the Admin tool.
2. Find existing user accounts:

The screenshot shows the 'Users' administration page. A purple header bar contains the word 'Users'. Below it is a white form area. On the left side of the page, there are five red lines pointing to specific elements in the form, each with a text label. The form elements are: a blue button labeled '[Add User]', a text input field labeled 'User Name', a text input field labeled 'Maximum Number to Find' containing the number '25', a radio button selection for 'Search String' with two options: 'At beginning of login name or full name.' (selected) and 'Anywhere in login name or full name.', and another radio button selection for 'Search Within' with two options: 'Current service.' (selected) and 'Entire site.'. At the bottom of the form are two buttons: 'Find' and 'Reset'.

Click to add a user account — [Add User]

Enter search string (optional) — User Name

Enter maximum number of results to return — Maximum Number to Find 25

Select one to determine how the search is performed — Search String

Select one to choose whether to search only within this service or within the entire site — Search Within

- a. Enter all or part of the visitor's name or login name in the User Name box. To list all the user accounts, leave the User Name field empty.
- b. Then enter the maximum number of results to be returned in the Maximum Number to Find box. The search is case-sensitive.
- c. To the right of Search String, select whether the Admin Tool searches for results beginning with the string or including the string by choosing either "At beginning of login name or full name." or "Anywhere in login name or full name."
- d. To the right of Search Within, select whether the Admin Tool searches for results from just this service or from the entire site by choosing either "Current service." or "Entire site."

The results appear as the List of Users.

Click to edit the
visitor's administrative
privileges

List of Users			
	Login Name	Name	Active
[Add User]			
[Settings] [Profile]	cesar	Cesar Customer	✓
[Settings] [Profile]	dave	Dave Enport	✓
[Settings] [Profile]	don	Don Ation	✓
[Settings] [Profile]	evan	Evan Tuly	✓
[Settings] [Profile]	fuzzball	Fuzzball White	✓
[Settings] [Profile]	joe	Joe Vial	✓
[Settings] [Profile]	lin	Lin Den	✓
[Settings] [Profile]	lisa	Lisa Truck	✓
[Settings] [Profile]	martha	Martha Marketer	✓
[Settings] [Profile]	mat	Mat Erial	✓
[Settings] [Profile]	miles	Miles Manager	✓
[Settings] [Profile]	phil	Phil Osophy	✓
[Settings] [Profile]	robyn	Robyn Reseller	✓
[Settings] [Profile]	sara	Sara SalesRep	✓
[Settings] [Profile]	sid	Sid Silicon	✓
[Settings] [Profile]	suzannah	Suzannah Sales Manager	✓
[Settings] [Profile]	teri	Teri Tester	✓

3. In the List of Users frame, select the Settings link for the user whose authorization you want to change.

Select to enable the visitor to administer project collaboration pages

4. In the Administrative Functions section of the Edit User window, select Project Admin to enable the visitor to create a project collaboration page, or select Project Admin a second time to disable the privilege for this visitor. Select Next at the bottom of the page, then select Save at the bottom of the second Edit User window to save the settings for this visitor.

▶ For more information on creating and editing user accounts, see [Chapter 1, “Administering User Accounts.”](#)

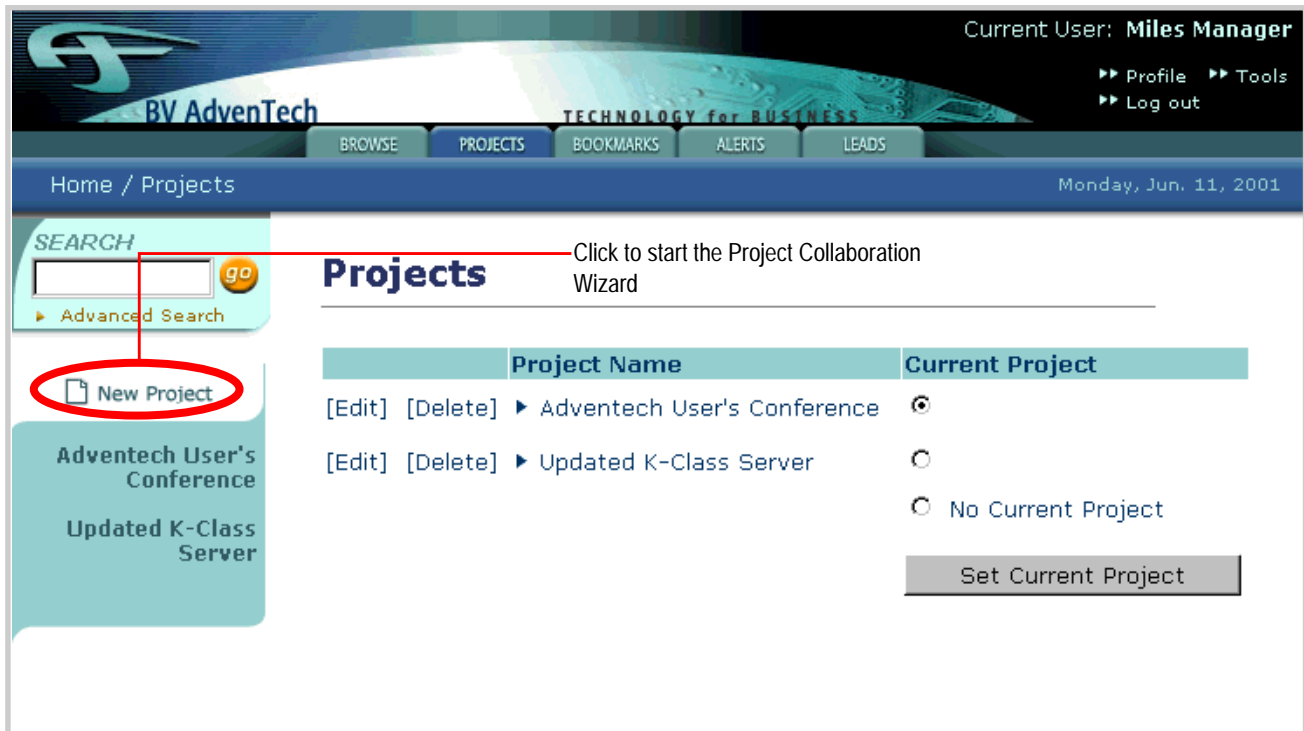
Using the Project Collaboration Page Wizard

To start a collaboration, an authorized visitor uses the Project Collaboration Page wizard from within a page produced with InfoExchange Portal.

▶ The following examples use the BVAdvenTech sample application.

To get to the Project Collaboration wizard in the BVAdvenTech sample application

1. Log in as a project administrator (such as user “miles” with password “miles”).
2. Select the PROJECTS tab.



3. Click the **New Projects** link on the left side of the window to start the Project Collaboration Page wizard.

Enter New Project Details

Project Name

Project Description

Project Goal

Enter Project Icon Here

or

Attach Project Icon Here **Browse...**

Next >

4. In the Enter New Project Details pop-up window, enter the following:
 - **Project Name** - the name of the project (mandatory)
 - **Project Description** - a text description of the project (optional)
 - **Project Goal** - a text description of the goal of the project (optional)
 - **Enter Project Icon Here** or **Attach Project Icon Here** - either enter the file's path relative to the *doc-root*, or click **Browse** to choose the image file for the project icon on the client machine (optional)

This information is later displayed on the Overview page of the project collaboration.

▶ The project information is not saved until you click **Finish** in the last window.

5. Click **Next** to go to the second page of the Enter New Phase Details window.

Enter New Phase Details

Phase Name

Phase Description

Phase Goal

6. The next step is to create one or more phases for your project. You can create phases in any order, because InfoExchange Portal displays phases alphabetically.

In the second **Create New Project** window, enter the following:

- **Phase Name** - the name of the first phase (mandatory)
- **Phase Description** - a text description of the phase (optional)
- **Phase Goal** - a text description of the goal of the phase (optional)

7. To return to the previous window, click Back. To abort the creation of the new project, click Cancel. Click Next to go to the project summary window.

The screenshot shows the 'Gizmo Summary' window. It has a title 'Gizmo Summary' and a subtitle 'Our newest and greatest gadget To create a smaller and faster version of our product'. Below this are four sections: Phases, Participants, Products, and Programs. The 'Phases' section has a radio button labeled 'Current' which is selected. The 'Participants' section has a table with columns 'User Name', 'User Alias', 'Owner', and 'Contact'. The 'Owner' column has a checked checkbox, and the 'Contact' column has an unchecked checkbox. At the bottom right are '< Back' and 'Finish' buttons. Red lines and circles connect various UI elements to text annotations on the left side of the image.

Select to make this project the current project

Click to edit this phase

Click to add a phase to this project

Check to make this visitor an owner of this project

Check to make this visitor a contact for this project

Click to add a participant to this project

Click to add a product to this project

Click to add a program to this project

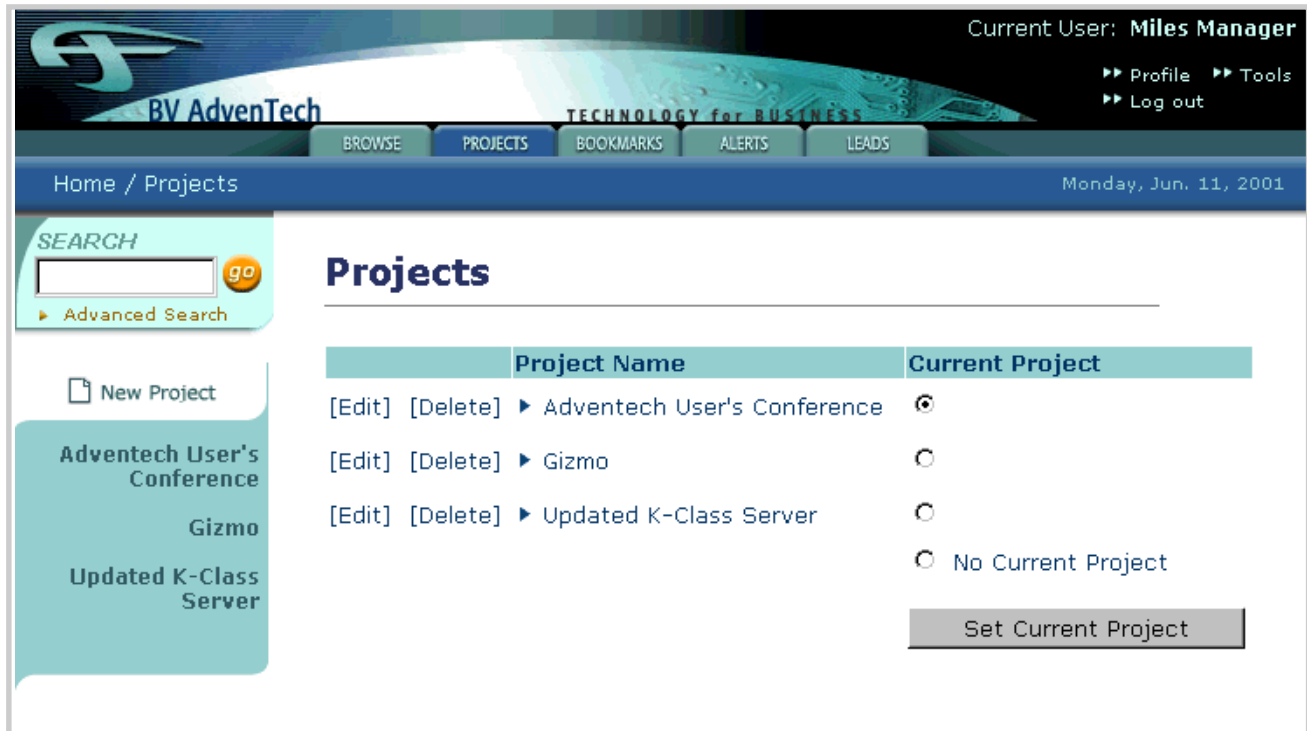
Click to save the new project

The project summary window is divided into four sections:

- **Phases** - the phases of the project. Click the radio button under the word Current to make a phase in the list the current phase. Participants see the current phase as the default phase when they go to the project collaboration page. For information on adding phases to a project, see [“Adding a phase to a project collaboration page” on page 163](#)
- **Participants** - the visitors participating in the project collaboration page. Any Owner can add other owners for the collaboration. Click the box under the word Contact to list a visitor in the Contacts page of the project collaboration. For information on adding participants to a project, see [“Adding a participant to a project collaboration page” on page 150](#)
- **Products** - the products related to the project. The Products page in the project has links to information on the related products. For example, if the project is a pre-sales collaboration, the products are the ones the prospect is considering for purchase. For information on adding products to a project, see [“Adding a product to the project collaboration page” on page 159](#)
- **Programs** - the programs associated with a phase of the project or with all phases of the project. Programs can contain content relevant to a phase, such as “Best Practices.” For information on adding programs to a project, see [“Adding a program to a project collaboration page” on page 156](#)

► Note that the wizard sets the first phase entered as current and makes the creator of the project the Owner.

8. Click Finish to save the new project.



Note that the new project has been added to the Projects page of the sample application.

Clicking the Set Current Project button sets the selected project as current. When the visitor logs in and goes to the project collaboration page, the visitor sees the home page for the project selected as current.

The tool also automatically creates a Public discussion group open to all participants of the collaboration. A project owner can add more discussion groups by selecting Discussions in the left menu of the project page.

Deleting a project

Follow these steps to delete a project:

1. On the Projects page, select [Delete] to the left of the project name and confirm.
2. Look in `$BV1TO1_VAR/logs/host/eplog` to get the commands for deleting the file attachments of tasks, meetings and announcements in the deleted project. Replace `$HTDOCS` in the commands with the path to the HTTP document root. Then run the commands on the HTTP server. For example, the `eplog` may contain something similar to:

```
rm -r $HTDOCS/Adventech/projects/8161/design.doc
```

The file format is:

`doc_root/service/projects/project_OID/document_name`

where:

<code>doc_root</code>	is the HTTP document root
<code>service</code>	is the service name, using the same case as in <code>bv1to1.conf</code>
<code>projects</code>	is the directory containing your projects
<code>project_OID</code>	is the OID for each project
<code>document_name</code>	is the name of the attached document

3. Look in `$BV1TO1_VAR/logs/host/dflog` to get the commands for deleting the discussion groups' attachment files of the deleted project, and replace `<docroot>` in the command with the path to your HTTP document root.

For example, the `dflog` file might contain something similar to:

```
rm -rf <docroot>/bv_dgattachments/8212
```

where 8212 is the OID of the discussion group.

For more information on the methods for discussion groups see the *Developer's Guide to Components and Scripts*. For more information on handling attachments, see the *InfoExchange Developer's Guide*.

Project components

The tool bar of the sample application has a Projects tab that lists all the collaborations in which that visitor participates, or if the visitor has chosen a current project, that project is displayed.

A project contains the following kinds of data:

- tasks - a time-ordered list of tasks that have an associated title, description, owner, start date, start time, due date, due time, completion date, completion time, priority, phase, group, and zero or more file attachments. The list is sorted by due date in the project collaboration page.
- meetings - a time-ordered list of meetings, each having a name, description, owner, meeting date, agenda, minutes, and zero or more file attachments. Meetings are sorted by meeting date in the collaboration page.
- overview - a summary printout of the project name, description, goal, icon, and phases, along with a check mark indicating the current phase.
- discussion groups - the discussion groups associated with the project. You can add, edit, deactivate, or delete discussion groups here.
- announcements - a time-ordered list of announcements that have an associated name, description, and zero or more file attachments. Announcements are sorted by creation date in the project collaboration page.
- participants - the people who are participating in the project.
- groups - the project groups associated with the project. You can add, edit, deactivate, or delete project groups here.
- programs - the programs associated with a phase of the project or with all phases of the project. Programs can contain content relevant to a phase, such as "Best Practices".

- products - links to product catalog pages.
- contacts - links to people who are the contacts for a project; the contact list is a subset of all the participants of a collaboration. Each contact has a textual description displayed next to the name that contains for example, the person's role.
- phases - the phases associated with the project.

Adding a task to a project collaboration page

To add a task to a project:

1. Select the name of the project to which the task is to be added. A page for that project similar to the following appears.

The screenshot displays the 'Adventech User's Conference' project page. At the top, the current user is identified as 'Miles Manager' with links for 'Profile', 'Tools', and 'Log out'. The navigation bar includes 'BROWSE', 'PROJECTS', 'BOOKMARKS', 'ALERTS', and 'LEADS'. The breadcrumb trail shows 'Home / Projects / Adventech User's Conference /' and the date is 'Monday, Jun. 11, 2001'. A search box is located on the left, and a 'View project:' dropdown menu is set to 'Adventech User's Conference'. The main heading is 'Adventech User's Conference' with a sub-heading 'Click one of these to add a task to this project'. Below this, there is a 'Phase' dropdown menu set to 'Site Selection' and a 'Set My Current Phase' button. The page is divided into several sections: 'My Tasks' (with sub-items 'Arrange Events' and 'Choose City'), 'Announcements' (with a sub-item 'Child Care to be Provided'), 'Meetings' (with a sub-item 'Site Selection Meeting'), and 'Discussions' (with sub-items 'Adventech User's Conference' and 'Adventech User's Conference (Private)'). A red circle highlights the 'Tasks' link in the left-hand navigation menu, and a red line points from it to the 'Set My Current Phase' button. Another red circle highlights a document icon next to the 'Announcements' section header.

2. Either select the page icon to the right of My Tasks, or select Tasks in the left menu and select the page icon to the left of Add New Task.

The Add New Task window appears.

Current User: Miles Manager
Profile Tools
Log out

BROWSE PROJECTS BOOKMARKS ALERTS LEADS

Home / Projects / Adventech User's Conference / Tasks Monday, Jun. 11, 2001

SEARCH go
Advanced Search

Project Home

Tasks
Meetings
Overview
Discussions
Announcements
Participants
Groups
Programs
Products
Contacts
Phases

Add New Task

Name

Description

Groups
Public

Owner

Start Date

Start Time

Due Date

Due Time

Priority

Phase

Attachments

Attachment Name

Attachment File

Enter the following information:

- **Name** - name of the task (required).
 - **Description** - description of the task (optional).
 - **Groups** - use the left mouse button to select the groups to which this task applies (required). See [“Adding a project group to a project collaboration page” on page 153](#) for information on creating project groups.
 - **Owner** - use the left mouse button to select the project owner from the pull-down menu (required).
 - **Start Date** - use the left mouse button to select the start date from the pull-down menus. Select the calendar icon to use the Date Picker pop-up window (required).
 - **Start Time** - use the left mouse button to select the start time from the pull-down menus (required).
 - **Due Date** - use the left mouse button to select the due date from the pull-down menus. Select the calendar icon to use the Date Picker pop-up window (required).
 - **Due Time** - use the left mouse button to select the due time from the pull-down menus (required).
 - **Priority** - use the left mouse button to select the priority from the pull-down menu (required).
 - **Attachments** - enter the Attachment Name, and either enter or use the Browse... button to navigate to the Attachment File (optional).
3. To blank the Add New Task form, click the Reset button; otherwise, click the Save button to save the new task.

The new task appears in the Tasks window.

Current User: Miles Manager
Profile Tools
Log out

BROWSE PROJECTS BOOKMARKS ALERTS LEADS

Home / Projects / Adventech User's Conference / Tasks Monday, Jun. 11, 2001

SEARCH
go
Advanced Search

Project Home

Tasks
Meetings
Overview
Discussions
Announcements
Participants
Groups
Programs
Products
Contacts
Phases

Adventech User's Conference

Tasks

Site Selection

	Name	Owner	Due Date	Completed
[Edit] [Delete]	Invite Guest Speakers Select and contact guest speakers for the User's Conference	Martha Marketer	Fri Jun 15	
[Edit] [Delete]	Arrange Events Arrange evening events	Miles Manager	Wed Sep 05	
[Edit] [Delete]	Choose City Choose city near international airport	Miles Manager	Tue Sep 11	
[Edit] [Delete]	Choose Hotels Choose conference hotels	Suzannah Sales Manager	Wed Sep 12	

Updating a task in a project collaboration page

To update a task in a project, click [Edit] to the left of the task name. The **Update Task** window appears.

SEARCH
[Text Input] **go**
▶ Advanced Search

Project Home

- Tasks
- Meetings
- Overview
- Discussions
- Announcements
- Participants
- Groups
- Programs
- Products
- Contacts
- Phases

Adventech User's Conference

Update Task

Task Name [Choose City]

Task Description [Choose city near international airport]

Groups [Private] [Public]

Owner [Miles Manager]

Start Date [September] [1] [2001] [Calendar Icon]

Start Time [10] [:00] [AM]

Due Date [September] [11] [2001] [Calendar Icon]

Due Time [5] [:00] [PM]

Completion Date [September] [30] [2001] [Calendar Icon]

Completion Time [11] [:55] [AM]

Priority [High]

Phase [Site Selection]

Attachments None

Additional Attachments

Attachment Name [Text Input]

Attachment File [Text Input] **Browse...**

Completed

Save **Reset**

Here you can update the following information:

- **Name** - name of the task.
- **Description** - description of the task.
- **Groups** - use the left mouse button to select or deselect groups to which this task applies (required). See [“Adding a project group to a project collaboration page”](#) on page 153 for information on creating project groups.
- **Owner** - use the left mouse button to select the project owner from the pull-down menu (required).
- **Start Date** - use the left mouse button to select the start date from the pull-down menus. Select the calendar icon to use the Date Picker pop-up window (required).
- **Start Time** - use the left mouse button to select the start time from the pull-down menus (required).
- **Due Date** - use the left mouse button to select the due date from the pull-down menus. Select the calendar icon to use the Date Picker pop-up window (required).
- **Due Time** - use the left mouse button to select the due time from the pull-down menus (required).
- **Completion Date** - use the left mouse button to select the due date from the pull-down menus. Select the calendar icon to use the Date Picker pop-up window (optional).
- **Completion Time** - use the left mouse button to select the due time from the pull-down menus (optional).
- **Priority** - use the left mouse button to select the priority from the pull-down menu (required).
- **Attachments** - enter the **Attachment Name**, and either enter or use the **Browse...** button to navigate to the **Attachment File** (optional).
- **Completed** - use the left mouse button to select the check box to the right to indicate this phase has been completed (optional).

To remove any changes you have made to the task, click the **Reset** button; otherwise, click the **Save** button to save the new task.

Obtaining an overview of the project

To see an overview of the selected project, on the Project page, select **Overview** in the left menu. The **Project Name**, **Project Description**, **Project Goal**, **Project Icon**, **Phases**, and an indicator of the current phase for the project appear.

The screenshot shows the 'Adventech User's Conference' overview page. At the top, the current user is identified as 'Miles Manager' with links for 'Profile', 'Tools', and 'Log out'. The navigation bar includes 'BROWSE', 'PROJECTS', 'BOOKMARKS', 'ALERTS', and 'LEADS'. The breadcrumb trail is 'Home / Projects / Adventech User's Conference / Overview' and the date is 'Tuesday, Jun. 12, 2001'. On the left, there is a search box and a vertical menu with options: 'Project Home', 'Tasks', 'Meetings', 'Overview' (highlighted), 'Discussions', 'Announcements', 'Participants', 'Groups', 'Programs', 'Products', 'Contacts', and 'Phases'. The main content area displays the project details: 'Project Name: Adventech User's Conference', 'Project Description: Set up the Adventech user's conference', and 'Project Goal:'. Below this is a 'Phases' section with a table showing the current phase.

Phase Name	Current
Call for Papers Choose conference theme and publish call for papers	
Site Selection Choose site for next user's conference	✓

Adding a discussion group

Follow these steps to add a discussion group to the current project:

1. Select the name of the project to which the discussion group is to be added. A page for that project similar to the following appears.

The screenshot shows the BV AdvenTech project collaboration interface. At the top, the user is identified as 'Miles Manager' with links for 'Profile', 'Tools', and 'Log out'. The navigation bar includes 'BROWSE', 'PROJECTS', 'BOOKMARKS', 'ALERTS', and 'LEADS'. The breadcrumb trail is 'Home / Projects / Adventech User's Conference /' and the date is 'Monday, Jun. 11, 2001'. A search box is on the left with a 'go' button and a link to 'Advanced Search'. The main heading is 'Adventech User's Conference'. Below it, the 'Phase' is set to 'Site Selection' with a 'Set My Current Phase' button. There are four main sections: 'My Tasks' (with sub-items 'Arrange Events' and 'Choose City'), 'Announcements' (with 'Child Care to be Provided'), 'Meetings' (with 'Site Selection Meeting'), and 'Discussions' (with 'Adventech User's Conference' and 'Adventech User's Conference (Private)'). Red circles highlight the 'Discussions' link in the left sidebar and the 'Adventech User's Conference' link in the main content area. Red arrows point from text annotations to these elements: 'Click to add a discussion group to this project phase' points to the sidebar, and 'Click to access a discussion group' points to the main content link.

2. On the Projects page, select Discussions in the left menu.

The screenshot displays the BV Adventech web application interface. At the top right, it shows the current user as 'Miles Manager' with links for 'Profile', 'Tools', and 'Log out'. The main navigation bar includes 'BROWSE', 'PROJECTS', 'BOOKMARKS', 'ALERTS', and 'LEADS'. The breadcrumb trail indicates the path: 'Home / Projects / Adventech User's Conference / Discussions'. The date 'Tuesday, Jun. 12, 2001' is shown in the top right corner.

On the left side, there is a search bar with a 'go' button and a link to 'Advanced Search'. Below the search bar is a 'Project Home' section with a list of navigation options: 'Tasks', 'Meetings', 'Overview', 'Discussions', 'Announcements', 'Participants', 'Groups', 'Programs', 'Products', 'Contacts', and 'Phases'. The 'Discussions' option is highlighted.

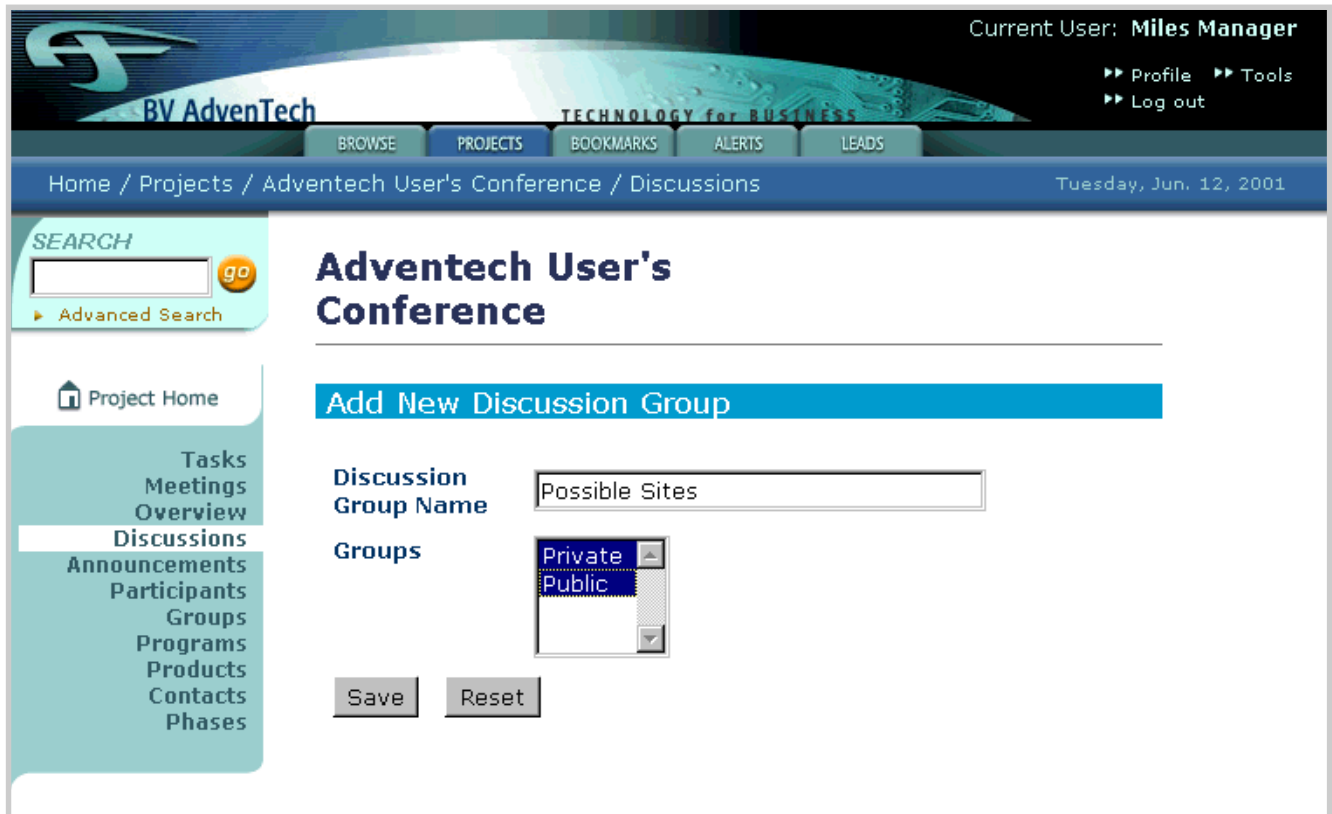
The main content area is titled 'Adventech User's Conference' and has a sub-section for 'Discussions'. It contains a table with the following data:

	Group Name
[Deactivate] [Edit] [Delete]	Adventech User's Conference
[Deactivate] [Edit] [Delete]	Adventech User's Conference (Private)

Below the table, there is a button labeled 'Add New Discussion Group' with a document icon. A red circle highlights this button, and a callout box with a red arrow points to it, containing the text: 'Click to add a discussion group to this project'.

3. Under Discussions, select **Add New Discussion Group**.

The **Add New Discussion Group** window appears.



Enter the following information:

- **Discussion Group Name** - name of the new discussion group (required).
 - **Groups** - use the left mouse button to select one or more access groups which can participate in the discussion group (required).
4. To clear the **Add New Discussion Group** form, click the **Reset** button; otherwise, click the **Save** button to save the new discussion group.

Updating a discussion group

Follow these steps to add a discussion group to the current project:

1. In the Discussions window of the current project, click [Edit] to the left of the name of the discussion group you want to update.

The Update Discussion Group window appears.

The screenshot shows the 'Add New Discussion Group' form within the 'Adventech User's Conference' project. The interface includes a top navigation bar with 'Current User: Miles Manager' and links for 'Profile', 'Tools', and 'Log out'. Below this is a secondary navigation bar with 'BROWSE', 'PROJECTS', 'BOOKMARKS', 'ALERTS', and 'LEADS'. The main content area features a search box, a 'Project Home' link, and a sidebar menu with options like 'Tasks', 'Meetings', 'Overview', 'Discussions', 'Announcements', 'Participants', 'Groups', 'Programs', 'Products', 'Contacts', and 'Phases'. The 'Add New Discussion Group' form contains a text input for 'Discussion Group Name' with the value 'Possible Sites', a dropdown menu for 'Groups' with 'Private' and 'Public' options, and 'Save' and 'Reset' buttons.

Here you can update the following information:

- **Discussion Group Name** - name of the new discussion group.
- **Groups** - use the left mouse button to select one or more access groups which can participate in the discussion group.

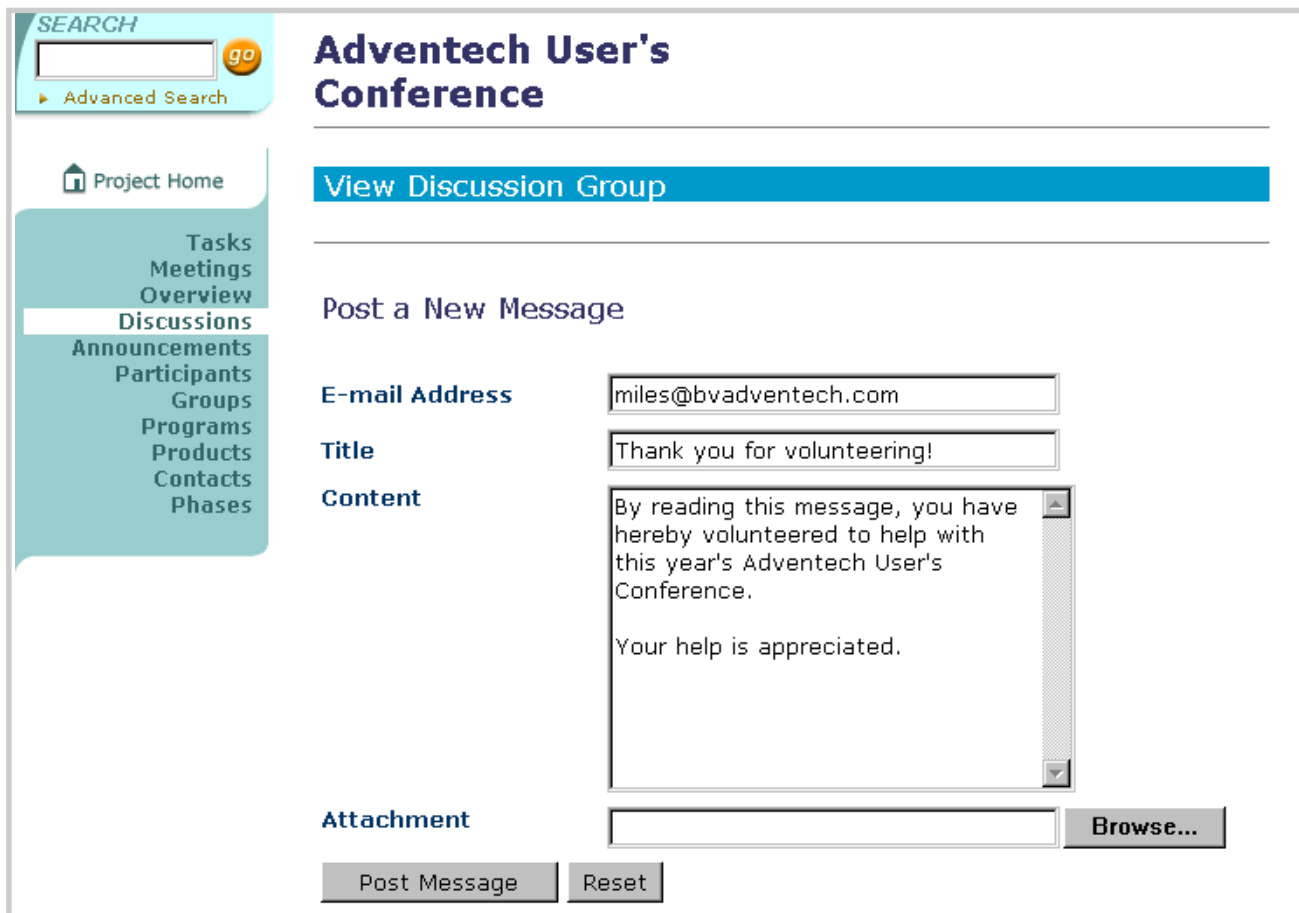
The Discussion Group ID is also shown. You cannot alter it.

2. To undo changes you have made to the Update Discussion Group form, click the Reset button; otherwise, click the Save button to save the changes you have made to the discussion group.

Adding a message to a discussion group

To add a message to a discussion group:

1. On the Project page, select the name of the discussion group.



The screenshot shows a web interface for the 'Adventech User's Conference' discussion group. On the left is a navigation sidebar with a search bar at the top, a 'Project Home' link, and a list of menu items: Tasks, Meetings, Overview, Discussions (highlighted), Announcements, Participants, Groups, Programs, Products, Contacts, and Phases. The main content area is titled 'Adventech User's Conference' and has a blue header bar that says 'View Discussion Group'. Below this is a section titled 'Post a New Message' with the following fields: 'E-mail Address' (filled with 'miles@bvadventech.com'), 'Title' (filled with 'Thank you for volunteering!'), and 'Content' (a text area containing 'By reading this message, you have hereby volunteered to help with this year's Adventech User's Conference. Your help is appreciated.'). There is also an 'Attachment' field with a 'Browse...' button. At the bottom are 'Post Message' and 'Reset' buttons.

2. The View Discussion Group window appears with a form enabling you to post to this group. Your E-mail Address is automatically entered. Here you can enter a Title, the Content of the message, and add any Attachment.
3. To clear the message form, click the Reset button; otherwise, click the Save button to post the message to the discussion group.

Activating and deactivating a discussion group

Whenever you create a discussion group, it is activated by default. To deactivate a discussion group, select the [Deactivate] link to the left of the discussion group name. The name of the link is changed to [Activate], and the discussion group is deactivated.

To activate a discussion group, select the [Activate] link to the left of the discussion group name. The name of the link is changed to [Deactivate], and the discussion group is activated.

Activating and deactivating a discussion group message

Whenever you create a message, it is activated by default. To deactivate a discussion group message, select the [Deactivate] link to the right of the message title. The name of the link is changed to [Activate], and the message is deactivated.

To activate a message, select the [Activate] link to the right of the message title. The name of the link is changed to [Deactivate], and the message is activated.

Deleting a discussion group

Follow these steps to delete one or more discussion groups:

1. Select the [Delete] link to the left of the discussion group you want to remove. A pop-up window asks you to confirm; click OK. The discussion group is deleted.
2. Look in `$BV1T01_VAR/logs/host/dflog` to get the command for deleting the attachment files of the deleted discussion group, and replace `<docroot>` in the command with the path to your HTTP document root.

For example, the `dflog` file might contain something similar to:

```
rm -rf <docroot>/bv_dgattachments/8212
```

where 8212 is the OID of the discussion group.

Deleting a discussion group message

Follow these steps to delete a message from a discussion group:

1. Select the [Delete] link to the right of the message you want to remove. A pop-up window asks you to confirm; click OK. The message and all replies to it are deleted.
2. Look in `$BV1T01_VAR/logs/host/dflog` to get the commands for deleting the attachment files of the deleted message, and replace `<docroot>` in the command with the path to your HTTP document root.

For example, the `dflog` file might contain something similar to:

```
rm -rf <docroot>/bv_dgattachments/8212/mymessage.txt
```

where 8212 is the OID of the discussion group.

Adding a participant to a project collaboration page

To add a participant to a project:

1. On the Project page, select **Participants** in the left menu.

Current User: **Miles Manager**
▶▶ Profile ▶▶ Tools
▶▶ Log out

BROWSE PROJECTS BOOKMARKS ALERTS LEADS

Home / Projects / Adventech User's Conference / Participants Tuesday, Jun. 12, 2001

SEARCH go
▶ Advanced Search


Project Home

Tasks
Meetings
Overview
Discussions
Announcements
Participants
Groups
Programs
Products
Contacts
Phases

Adventech User's Conference

Participants

	Name	Owner	Contact
[Settings] [Remove]	Martha Marketer	<input type="checkbox"/>	<input checked="" type="checkbox"/>
[Settings] [Remove]	Miles Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
[Settings] [Remove]	Suzannah Sales Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

 Add New Participant

Click to add a participant to this project

2. Click **Add New Participant**.

The Add New Participant window appears.

The screenshot shows the BV AdvenTech web application interface. At the top right, it displays 'Current User: Miles Manager' with links for 'Profile', 'Tools', and 'Log out'. A navigation bar includes 'BROWSE', 'PROJECTS', 'BOOKMARKS', 'ALERTS', and 'LEADS'. The breadcrumb trail reads 'Home / Projects / Adventech User's Conference / Participants' and the date is 'Tuesday, Jun. 12, 2001'. On the left, there is a search box with a 'go' button and a link to 'Advanced Search'. Below that is a 'Project Home' icon and a vertical menu with options: 'Tasks', 'Meetings', 'Overview', 'Discussions', 'Announcements', 'Participants' (highlighted), 'Groups', 'Programs', 'Products', 'Contacts', and 'Phases'. The main content area features the title 'Adventech User's Conference' and a blue bar labeled 'Add New Participant'. Below this bar is a form with two input fields: 'User Name' (an empty text box) and 'Max number to find' (a text box containing '25'). A 'Find Participant' button is located below the second field.

3. To find a specific visitor, enter all or part of the user account name in the **User Name** box. To list all visitors, leave the **User Name** field empty. Then enter the maximum number of results to be returned in the **Max Number to find** box and click the **Find Participant** box. The search is case-sensitive.

4. Click the Find Participant button.

The results appear in the bottom half of the Add Participant window.

The screenshot displays the BV AdvenTech web application interface. At the top, the current user is identified as 'Miles Manager' with links for 'Profile', 'Tools', and 'Log out'. The navigation menu includes 'BROWSE', 'PROJECTS', 'BOOKMARKS', 'ALERTS', and 'LEADS'. The breadcrumb trail shows the path: 'Home / Projects / Adventech User's Conference / Participants', with the date 'Tuesday, Jun. 12, 2001' on the right.

The main content area is titled 'Adventech User's Conference' and features an 'Add Participant' section. This section includes a 'User Name' input field, a 'Max number to find' dropdown menu set to '25', and a 'Find Participant' button. Below this, a list of participants is shown, each with a checkbox:

- Cesar Customer
- Dave Enport
- Don Ation
- Ed Norton
- Evan Tuly
- Fuzzball White
- Joe Vial
- Lin Den
- Lisa Truck
- Martha Marketer
- Mat Erial
- Miles Manager
- Phil Osophy
- Robyn Reseller
- Sara SalesRep
- Sid Silicon
- Suzannah Sales Manager
- Teri Tester

An 'Add Participant' button is located at the bottom of the list.

5. Click the boxes to the left of visitors you want to add to the project collaboration page as participants.
6. Click **Add Participant** at the bottom of the page. The selected visitors appear in the list of **Participants** in the Project Collaboration Page wizard.
7. To make any of these visitors an **Owner** or a **Contact** for this project, check the respective boxes to the right of their names and click the **Update** button.

Removing a participant from a project

To remove a participant from a project:

1. Click **[Remove]** to the left of the visitor's name to remove him or her from the project.
2. You are then asked for confirmation before the participant is deleted; click **OK**.

Adding a project group to a project collaboration page

To add a project group to the project collaboration page:

1. On the Project page, select **Groups** in the left menu.

The screenshot displays the BV Adventech web application interface. At the top right, it shows 'Current User: Miles Manager' with links for 'Profile', 'Tools', and 'Log out'. The navigation bar includes 'BROWSE', 'PROJECTS', 'BOOKMARKS', 'ALERTS', and 'LEADS'. The breadcrumb trail is 'Home / Projects / Adventech User's Conference / Groups' and the date is 'Tuesday, Jun. 12, 2001'. The main content area is titled 'Adventech User's Conference' and 'Groups'. A table lists group settings: 'Name' is 'Public' and 'Private'. Below the table is a red circle around the 'Add New Group' button, with a callout box stating 'Click to add a project group to this project'. The left sidebar contains a search bar and a menu with items like 'Project Home', 'Tasks', 'Meetings', 'Overview', 'Discussions', 'Announcements', 'Participants', 'Groups', 'Programs', 'Products', 'Contacts', and 'Phases'.

1. Click Add New Group.

The screenshot shows the BV AdvenTech web application interface. At the top, the current user is identified as 'Miles Manager' with links for Profile, Tools, and Log out. The navigation bar includes 'BROWSE', 'PROJECTS', 'BOOKMARKS', 'ALERTS', and 'LEADS'. The breadcrumb trail is 'Home / Projects / Adventech User's Conference / Groups' and the date is 'Tuesday, Jun. 12, 2001'. The main content area is titled 'Adventech User's Conference' and features a blue 'Add New Group' button. Below this, there are two input fields: 'Name' with the value 'Planning Committee' and 'Description' with the value 'Planning committee for the User's Conference'. A 'Group Members' section lists four users with checkboxes: Dave Enport, Ed Norton, Fuzzball White, and Martha Marketer. Below the list, 'Miles Manager' and 'Suzannah Sales Manager' are listed with an 'x' icon. At the bottom of the form are 'Save' and 'Reset' buttons. A left sidebar contains a search box and a navigation menu with items like 'Project Home', 'Tasks', 'Meetings', 'Overview', 'Discussions', 'Announcements', 'Participants', 'Groups', 'Programs', 'Products', 'Contacts', and 'Phases'.

2. Enter the following:
 - Name - name of the group (required).
 - Description - description of the (optional).
3. Select **Group Members** by using the left mouse button to check the boxes to the left of the names of people you want in the group (required). Note that project owners are automatically members of all project groups.
4. To clear the **Add New Group** form, click the **Reset** button; otherwise, click the **Save** button to save the new project group.

Updating a project group to a project collaboration page

To update a project group in the project collaboration page:

1. Click [Edit] to the left name of the project group you want to update.

The Update Group window appears.

The screenshot shows the 'Update Group' window for the 'Adventech User's Conference' project. The window is titled 'Update Group' and contains the following elements:

- Name:** A text input field containing 'Planning Committee'.
- Description:** A text area containing 'Planning committee for the User's Conference'.
- Group Members:** A list of names with checkboxes to the left:
 - Dave Enport
 - Ed Norton
 - Fuzzball White
 - Martha Marketer
- Current User:** Miles Manager
- Buttons:** 'Save' and 'Reset' buttons at the bottom.

2. Here you can change the following:

- **Name** - name of the group.
- **Description** - description of the group.
- **Group Members** - use the left mouse button to select or deselect the boxes to the left of the names of people you want in the group.

3. To remove any changes you have made to the project group, click the **Reset** button; otherwise, click the **Save** button to save the changes you have made to the project group.

Removing a project group from a project

To remove a project group from a project:

1. Click [Delete] to the left of the name of the project group you want to remove.
2. You are then asked for confirmation before the project is deleted; click OK.

Adding a program to a project collaboration page

To add a program to the project collaboration page:

1. On the Project page, select Programs from the left menu.

The screenshot shows the user interface for the 'Adventech User's Conference' project. At the top, the current user is identified as 'Miles Manager' with links for Profile, Tools, and Log out. The navigation bar includes 'BROWSE', 'PROJECTS', 'BOOKMARKS', 'ALERTS', and 'LEADS'. The breadcrumb trail is 'Home / Projects / Adventech User's Conference / Programs' and the date is 'Tuesday, Jun. 12, 2001'. On the left, a search bar and a 'Project Home' link are visible. The main content area is titled 'Adventech User's Conference' and features a 'Programs' section with a table. The table has columns for 'Name' and 'Phase'. A row shows a program named 'White Papers' with a '[Remove]' link and a phase dropdown set to 'All Phases' and an 'Update' button. Below the table, there is a button labeled 'Add New Program' with a document icon, which is circled in red. A red arrow points from this button to the text 'Click to add a program to this project'.

Name	Phase
[Remove] White Papers	All Phases

[Add New Program](#)
Click to add a program to this project

2. Click Add New Program.

The Add New Program window appears.

The screenshot shows the BV AdvenTech website interface. At the top right, it displays 'Current User: Miles Manager' with links for 'Profile', 'Tools', and 'Log out'. A navigation bar includes 'BROWSE', 'PROJECTS', 'BOOKMARKS', 'ALERTS', and 'LEADS'. The breadcrumb trail reads 'Home / Projects / Adventech User's Conference / Programs' and the date is 'Tuesday, Jun. 12, 2001'. On the left, there is a search box with a 'go' button and a link to 'Advanced Search'. Below that is a 'Project Home' icon and a vertical menu with options: 'Tasks', 'Meetings', 'Overview', 'Discussions', 'Announcements', 'Participants', 'Groups', 'Programs', 'Products', 'Contacts', and 'Phases'. The main content area features the title 'Adventech User's Conference' and a blue bar labeled 'Add New Program'. Below this bar is a form with two input fields: 'Program Name' (empty) and 'Max number to find' (containing '25'). A 'Find Program' button is positioned below the second field.

3. To find an existing program, enter all or part of the program name in the Program Name box. To list all programs, leave the Program Name field empty. Then enter the maximum number of results to be returned in the Max Number to find box and click the Find Program box. The search is case-insensitive.

The results appear in the bottom half of the Add New Program window.

Add New Program

Program Name

Max number to find

- Accessories
- All Departments
- All Employees
- All Sales Employees
- Antarctic Sales
- Competitive Analysis
- Culture and Values
- Data Sheets
- HTTP Portlet
- Investor Relations
- Latest News
- MRDs
- Marketing
- News in the UK
- North American Product Releases
- PDAs
- Price Lists
- Sales
- Servers
- What People Are Saying
- White Papers
- Workstations

4. Click the boxes to the left of programs you want to add to the project collaboration page.
5. Click **Add** at the bottom of the page. The selected programs then appear in the list of Programs on the project collaboration page. From here you can update the phase by using the pull-down menu to the right of each program to select a phase and clicking the **Update** button to the right.

Removing a program from a project

To remove a program from a project:

1. Click [Remove] to the left of the program to remove it from the project.
2. You are then asked for confirmation before the program is deleted; click OK.

Adding a product to the project collaboration page

To add a product to the project collaboration page:

1. On the Project page, select **Products** in the left menu.

The screenshot shows the BV Adventech project collaboration page. The header includes the BV Adventech logo, the tagline 'TECHNOLOGY for BUSINESS', and the current user 'Miles Manager'. The navigation menu includes 'BROWSE', 'PROJECTS', 'BOOKMARKS', 'ALERTS', and 'LEADS'. The breadcrumb trail is 'Home / Projects / Adventech User's Conference / Products'. The date is 'Tuesday, Jun. 12, 2001'. The main content area is titled 'Adventech User's Conference' and has a 'Products' section. A table with columns 'Product ID' and 'Name' is shown. A red circle highlights the 'Add New Product' button, with a callout box stating 'Click to add a product to this project'. The left sidebar contains a search box and a list of navigation items: Project Home, Tasks, Meetings, Overview, Discussions, Announcements, Participants, Groups, Programs, Products, Contacts, and Phases.

- ▶ Products and programs are associated with a project but are not associated with a particular phase of the project.

2. Click **Add New Product**.

The Add New Product window appears.

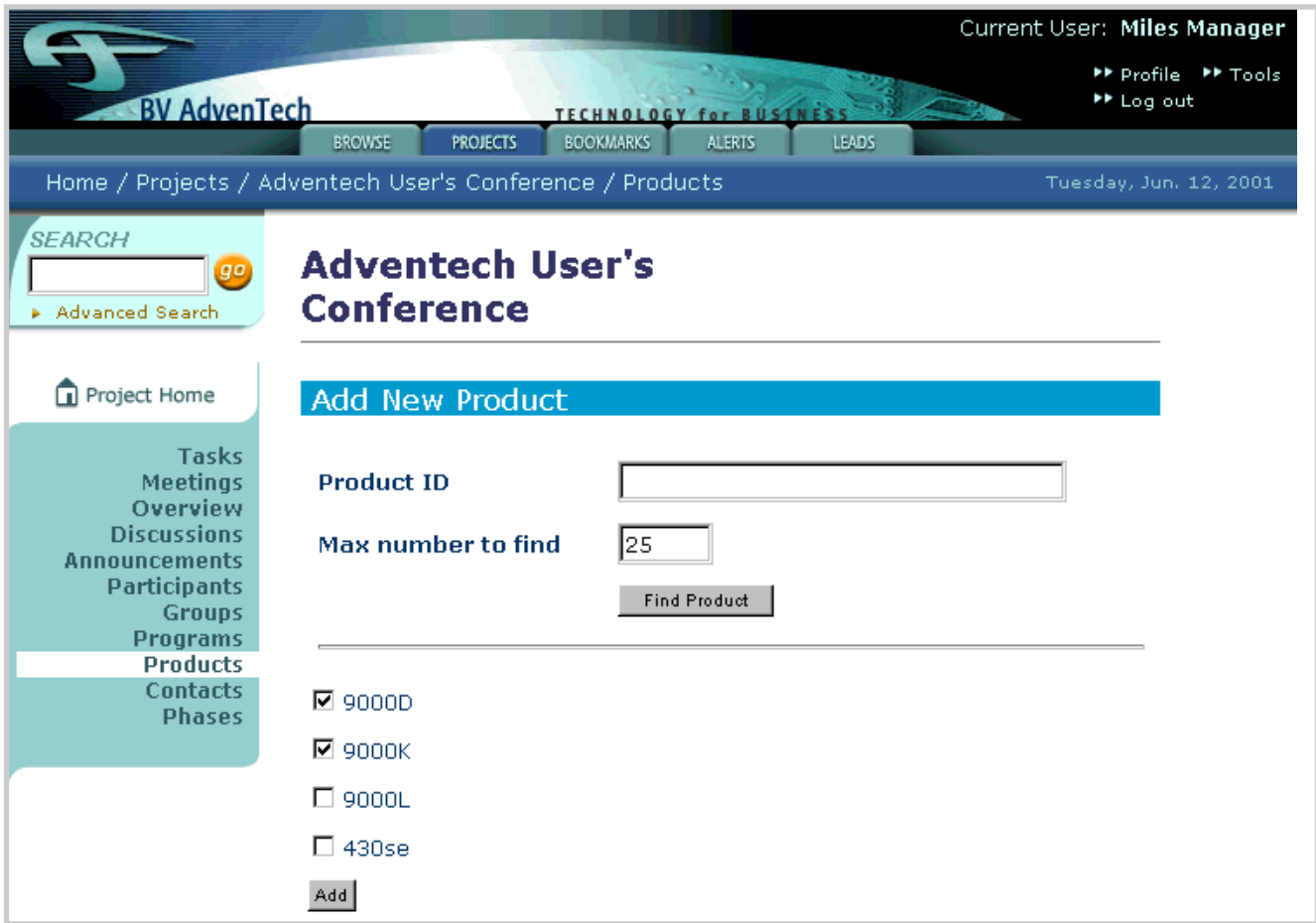
The screenshot shows the BV AdvenTech web application interface. At the top, the logo and tagline 'TECHNOLOGY for BUSINESS' are visible. The current user is identified as 'Miles Manager'. Navigation tabs include BROWSE, PROJECTS, BOOKMARKS, ALERTS, and LEADS. The breadcrumb trail is 'Home / Projects / Adventech User's Conference / Products'. A search bar is present on the left. The main content area is titled 'Adventech User's Conference' and contains a table of products. The 'Add New Product' button is circled in red, with a callout box indicating 'Click to add a product to this project'.

	Product ID	Name
[Remove]	9000L	Adventech 9000 L-Class Enterprise Server
[Remove]	430se	Adventech 430 SE Palm PC
	Add New Product	

Click to add a product to this project

3. To find an existing product, enter all or part of the product ID in the Product ID box. To list all the products, leave the Product ID field empty. Then enter the maximum number of results to be returned in the Max Number to find box. The search is not case-sensitive.

The results appear in the bottom half of the Add New Product window.



4. Click the boxes to the left of products you want to add to the project collaboration page, then click the **Add** button at the bottom of the page. The selected products then appear in the list of Products.

Removing a product group from a project

To remove a product from a project:

1. Click **[Remove]** to the left of the name of the product you want to remove
2. You are then asked for confirmation before the product is removed; click **OK**.

Viewing project contacts

To view a list of the contacts for the selected project, select **Contacts** in the left menu. The contacts for the project appear.



The screenshot shows the BV AdventTech web application interface. At the top, the current user is identified as 'Miles Manager' with options for Profile, Tools, and Log out. The navigation menu includes BROWSE, PROJECTS, BOOKMARKS, ALERTS, and LEADS. The breadcrumb trail is 'Home / Projects / Adventech User's Conference / Contacts' and the date is 'Tuesday, Jun. 12, 2001'. On the left, there is a search bar and a 'Project Home' section with a list of navigation items: Tasks, Meetings, Overview, Discussions, Announcements, Participants, Groups, Programs, Products, **Contacts**, and Phases. The main content area displays the title 'Adventech User's Conference' and a 'Contacts' table with three entries.

Name	Email	Business Phone
Miles Manager Role: Project Manager	miles@bvadventech.com	(555) 123-0001
Suzannah Sales Manager Role:	suzannah@bvadventech.com	(555) 123-0002
Martha Marketer Role:	martha@bvadventech.com	(555) 123-0003

Adding a phase to a project collaboration page

To add a phase to the project:

1. On the Project page, select **Phases** from the left menu.

The screenshot shows the BV Adventech user interface. At the top, the current user is identified as Miles Manager, with links for Profile, Tools, and Log out. The navigation bar includes BROWSE, PROJECTS, BOOKMARKS, ALERTS, and LEADS. The breadcrumb trail is Home / Projects / Adventech User's Conference / Phases, and the date is Tuesday, Jun. 12, 2001.

The main content area is titled "Adventech User's Conference" and features a "Phases" section. This section contains a table with the following data:

	Phase Name	Current
[Edit] [Delete]	Call for Papers Choose conference theme and publish call for papers	<input type="radio"/>
[Edit]	Site Selection Choose site for next user's conference	<input checked="" type="radio"/>

Below the table is an "Update" button. At the bottom of the page, there is a button labeled "Add New Phase" with a document icon, circled in red. A callout box points to this button with the text: "Click to add a phase to this project".

2. Click Add New Phase.

The screenshot shows a web application interface for 'Adventech User's Conference'. At the top, there is a navigation bar with 'BROWSE', 'PROJECTS', 'BOOKMARKS', 'ALERTS', and 'LEADS'. The current user is identified as 'Miles Manager' with links for 'Profile', 'Tools', and 'Log out'. The breadcrumb trail is 'Home / Projects / Adventech User's Conference / Phases' and the date is 'Tuesday, Jun. 12, 2001'. On the left, there is a search box and a sidebar menu with options like 'Project Home', 'Tasks', 'Meetings', 'Overview', 'Discussions', 'Announcements', 'Participants', 'Groups', 'Programs', 'Products', 'Contacts', and 'Phases'. The main content area is titled 'Adventech User's Conference' and contains an 'Add New Phase' form. The form has three fields: 'Name' with the value 'Select Guest Speakers', 'Description' with the text 'Determine who we ought to invite to impart their knowledge to the User's Conference attendees', and 'Goal' with the text 'To create a list of guest speakers for the User's Conference'. At the bottom of the form are 'Save' and 'Reset' buttons.

In the Add New Phase window enter the following:

- **Name** - name of the phase (required).
 - **Description** - description of the phase (optional).
 - **Goal** - the goal of this phase (optional).
3. To clear the entries in the phase, click the Reset button. Click the Save button to save the new phase.

Updating a phase in a project collaboration page

To update a phase in the project:

1. On the Project page, select **Phases** from the left menu.

2. Click [Edit] to the left of the phase you want to update.

The Update Phase window appears.

The screenshot shows a web application interface for 'BV AdvenTech'. The top navigation bar includes 'BROWSE', 'PROJECTS', 'BOOKMARKS', 'ALERTS', and 'LEADS'. The current user is 'Miles Manager'. The page title is 'Adventech User's Conference' and the date is 'Tuesday, Jun. 12, 2001'. The main content area is titled 'Update Phase' and contains a form with the following fields:

- Name:** Select Guest Speakers
- Description:** Determine who we ought to invite to impart their knowledge to the User's Conference attendees
- Goal:** To create a list of guest speakers for the User's Conference

At the bottom of the form are 'Save' and 'Reset' buttons. A sidebar on the left contains a search box and a list of navigation options: Project Home, Tasks, Meetings, Overview, Discussions, Announcements, Participants, Groups, Programs, Products, Contacts, and Phases.

3. Here you can update the following:
 - **Name** - name of the phase.
 - **Description** - description of the phase.
 - **Goal** - the goal of this phase.
4. To remove any changes you have made to the project group, click the **Reset** button; otherwise, click the **Save** button to save the changes you have made to the phase.

Administering closed-loop process management

Closed-loop process management changes the collaborative nature of enterprise relationship management by automatically tracking specific uses of an enterprise portal. The InfoExchange Portal closed-loop process management system can be used to track and manage action items, ticket items, or leads. In most implementations, tickets and action items are generated through a page in the site, such as the collaboration page. For example, ticket items can be issues discovered during a meeting or posted on the collaboration page, and action items can be defined steps within a phase of a project.

A lead is generated when a visitor accessing an InfoExchange Portal site requests information from the site, such as a White Paper, or engages in some other action where the visitor fills in an instant publisher form and provides information about himself or herself, such as filling out a trouble ticket. Submitting the form creates a lead content item and automatically routes it to a lead owner using a matching alert. An InfoExchange Portal page can also be set up so clicking a link creates a lead content item by calling the appropriate component APIs.

The goal of closed-loop process management is to turn visits to a web site into action items. A new item, such as an action, ticket, or lead, is created using an instant publisher form. Items advancing through the closed-loop process are never lost, as the system tracks the progress and the individuals involved. A manager can quickly see which items are new, resolved, unresolved, or deleted. If an individual to whom an item has been assigned cannot resolve the issue or complete the task, the manager can assign the item to someone else.

If the item owner does not act on the action item by a specified time, the owner is sent an e-mail reminder. After a specified number of reminders have been sent, the action item is automatically forwarded to the manager.

The database administrator needs to extend the lead content type and visitor profile table with custom attributes appropriate to the InfoExchange Portal customer's needs for closed-loop process management. The Lead content type contains attributes for name, e-mail address, and visitor contact information (such as e-mail, fax, and phone). All other attributes are sample attributes.

The database administrator needs to extend the Owner Organization content type with custom attributes appropriate to the site's needs for closed-loop process management. The Owner Organization content type contains attributes for Lead Owner Name, Office, Address, City, State, Zip, Contact Person, and Lead Manager (the host enterprise sales manager managing leads with that office).

Setting up user accounts to administer closed-loop process management

You need to identify which visitors (for example, a sales manager or reseller) are allowed to manage the lead owner organizations.

All visitors that are contacts for a lead owner organization (lead owner organizations are called "sales agents" in the BVAdventech reference application):

- must be in a Publishing Center access group that grants read or higher permission on the root category of the BV_EP_LEAD content type to be able to see the Leads tab in the BVAdventech reference application (see `Session.leadPermission` in the files `login_adventech.jsp` and `topNav.jsp`)
- must be in a Publishing Center access group that grants write or higher permission on each BV_EP_LEAD category containing the leads assigned to them to be able to edit their leads

All visitors that are sales managers:

- must be in a Publishing Center access group that grants read or higher permission on the BV_EP_LEAD content type's root category to be able to see the Leads tab in the BVAdventech reference application (see `Session.leadPermission` in the files `login_adventech.jsp` and `topNav.jsp`)
- must be in a Publishing Center access group that grants write or higher permission on the BV_EP_LEAD category(s) containing the leads assigned to the contact persons of the owner organizations managed by that sales manager

- must be in a Publishing Center access group that grants approve permission on each BV_EP_OWNER_ORG category containing the owner organizations managed by that sales manager
- must have the Lead Owner Admin checkbox checked in the User Settings of the Admin Tool to be able to get the links for adding and editing sales agents in the BVAdvenTech reference application

▶ Lead owner administrators create the lead owner organizations and assign a visitor as the contact person for each owner organization. Anyone that can own a lead must be a contact person of an owner organization. When a lead owner administrator creates a lead owner organization, the lead owner administrator automatically becomes the manager of that owner organization.

Setting up a new visitor to administer closed-loop process management

To set up a new visitor to administer lead owner organizations:

1. In the left frame of the Admin Tool, click Users.

The screenshot shows the 'Users' page in the Admin Tool. On the left, there are five red annotations with lines pointing to specific elements in the interface:

- 'Click to add a user account' points to the '[Add User]' link.
- 'Enter search string (optional)' points to the 'User Name' text input field.
- 'Enter maximum number of results to return' points to the 'Maximum Number to Find' input field, which contains the value '25'.
- 'Select one to determine how the search is performed' points to the 'Search String' radio button options: 'At beginning of login name or full name.' (selected) and 'Anywhere in login name or full name.'
- 'Select one to choose whether to search only within this service or within the entire site' points to the 'Search Within' radio button options: 'Current service.' (selected) and 'Entire site.'

At the bottom of the form are 'Find' and 'Reset' buttons.

2. To add a user account, click the [Add User] link at the top of the frame. The Add User form appears.

Add User

Login Name:

Password:

Verify Password:

Name:

Active:

Receive E-mail Alerts:

Administrative Functions:

- Site Admin
- Service Admin
- Publishing Center User
- Project Admin
- Lead Owner Admin

Select Organization:

Select Channels user can administer:

Select Organizations user can administer:

User Template:

Select Qualifiers:

Check to enable this visitor to add, edit, and delete lead owner organizations

3. Use the left mouse button to select **Lead Owner Admin** to enable the visitor to add, edit, and delete lead owner organizations. For example, if the visitor is a sales manager responsible for lead owner organizations, check this box.
4. Follow the rest of account creation as described in [“Adding a user account” on page 45](#).

Setting up an existing visitor to administer leads

To set up an existing visitor to administer lead owner organizations:

The screenshot shows the 'Users' administration page. It features a purple header with the word 'Users'. Below the header is a link '[Add User]'. The main content area contains several input fields and radio buttons. A red oval highlights the 'User Name' text input field. Another red oval highlights the 'Maximum Number to Find' input field, which contains the number '25'. Two red ovals highlight the radio buttons for 'Search String': 'At beginning of login name or full name.' and 'Anywhere in login name or full name.'. A third red oval highlights the radio buttons for 'Search Within': 'Current service.' and 'Entire site.'. On the left side of the screenshot, there are four lines of text with red arrows pointing to the corresponding fields: 'Enter search string (optional)' points to the 'User Name' field; 'Enter maximum number of results to return' points to the 'Maximum Number to Find' field; 'Select one to determine how the search is performed' points to the 'Search String' radio buttons; and 'Select one to choose whether to search only within this service or within the entire site' points to the 'Search Within' radio buttons. At the bottom of the form are two buttons: 'Find' and 'Reset'.

1. In the Users frame, enter all or part of the visitor's name or login name in the User Name box. To list the first N of all the user accounts where N is the maximum number of results to be returned, leave the User Name field empty.
 2. Enter the maximum number of results to be returned in the Maximum Number to Find box. The search is case-sensitive.
 3. To the right of Search String, select whether the Admin Tool searches for results beginning with the string or including the string by choosing either "At beginning of login name or full name." or "Anywhere in login name or full name."
- ▶ Selecting "At beginning of login name or full name." performs a faster search than selecting "Anywhere in login name or full name."

4. To the right of Search Within, select whether the Admin Tool searches for results from just this service or from the entire site by choosing either “Current service.” or “Entire site.”

The results appear as the List of Users.

Click to edit the setting that enables this visitor to add, edit, and delete lead owner organizations

List of Users			
	Login Name	Name	Active
[Add User]			
[Settings] [Profile]	cesar	Cesar Customer	✓
[Settings] [Profile]	dave	Dave Enport	✓
[Settings] [Profile]	don	Don Ation	✓
[Settings] [Profile]	evan	Evan Tuly	✓
[Settings] [Profile]	fuzzball	Fuzzball White	✓
[Settings] [Profile]	joe	Joe Vial	✓
[Settings] [Profile]	lin	Lin Den	✓
[Settings] [Profile]	lisa	Lisa Truck	✓
[Settings] [Profile]	martha	Martha Marketer	✓
[Settings] [Profile]	mat	Mat Erial	✓
[Settings] [Profile]	miles	Miles Manager	✓
[Settings] [Profile]	phil	Phil Osophy	✓
[Settings] [Profile]	robyn	Robyn Reseller	✓
[Settings] [Profile]	sara	Sara SalesRep	✓
[Settings] [Profile]	sid	Sid Silicon	✓
[Settings] [Profile]	suzannah	Suzannah Sales Manager	✓
[Settings] [Profile]	teri	Teri Tester	✓

5. Click Settings in the row that contains the user account name.

Check to enable this visitor to add, edit, and delete lead owner organizations

The screenshot shows the 'Edit User' form with the following fields and options:

- Login Name:** ed
- Password:** (empty)
- Verify Password:** (empty)
- Name:** Ed Norton
- Active:**
- Receive E-mail Alerts:**
- Administrative Functions:**
 - Site Admin
 - Service Admin
 - Publishing Center User
 - Project Admin
 - Lead Owner Admin
- Select Organization:** Find /Adventech
- Select Channels user can administer:** Find /News
- Select Organizations user can administer:** Find (empty)
- User Template:** Business
- Select Qualifiers:** Find Department, Industry Type, Language, Role

At the bottom of the form are 'Next' and 'Reset' buttons.

6. Use the left mouse button to select **Lead Owner Admin** to enable the visitor to add, edit, and delete lead owner organizations. For example, if the visitor is a sales manager responsible for lead owner organizations, check this box.

7. Follow the rest of account creation as described in [“Editing a visitor’s account” on page 51](#).

Setting up a user template for closed-loop process management

You can set up a new or existing user template to put visitors in the appropriate closed-loop process management access groups.

▶ For more information on user templates, see [“Administering user templates” on page 87.](#)”

To create a new user template that assigns visitors to a closed-loop process management access group:

1. Click **Add User Template** at the top of the frame.

The screenshot shows a web form titled "Add User Template". The form contains the following fields and controls:

- User Template Name:** Text input field containing "Sanitation Engineer".
- Description:** Text input field containing "The people who keep things clean".
- Scripts:** A section containing two text input fields:
 - Personal Profile:** Text input field containing "/adventech/scripts/common/changeProfile.jsp".
 - Matching Profile:** Text input field containing "/adventech/scripts/common/changeMatch.jsp".
- Status:** Radio button controls for "On-line" (selected) and "Off-line".
- Page Type:** A dropdown menu currently showing "Employee".
- Select Qualifiers:** A section with a "Find" button and a list box containing the text "Role".
- Navigation:** "Next" and "Reset" buttons at the bottom right.

▶ When you save the specifications for the scripts and page types, all existing user accounts derived from the user template are adjusted accordingly.

In this example we add the user template **Sanitation Engineer**.

2. Click Next to go to the second page of the Add User Template form.

Click to enable visitors with the user template to work on leads on specified workflow states

Click to give visitors with the user template permission to add, edit, and delete lead owner organizations

The screenshot shows the 'Add User Template' form. The title bar is purple and contains the text 'Add User Template'. Below the title bar, the text 'User Template Sanitation Engineer' is displayed. The 'Access Groups' section contains a list box with the following items: 'Adventech Sales Agents', 'Adventech Sales Managers', 'BV Adventech Business', 'BV Adventech Contractors', 'BV Adventech Executive', 'BV Adventech Techie', and 'BV Adventech Visitor'. The first two items are circled in red. The 'Qualifiers' section has a 'Role' dropdown menu with options: 'Business Development', 'Contributor', 'Customer', and 'Director'. A checkbox labeled 'Always Match This Qualifier' is checked. At the bottom, there are two buttons: 'Save and Next' and 'Reset'.

3. Use the left mouse button to select **Adventech Sales Agents** to give visitors with this user template access to work on leads. Use the left mouse button to select **Adventech Sales Managers** to give the visitors with the user template permission to add, edit, and delete lead owner organizations. All users who are contacts for an owner organization must be in **Adventech Sales Agents**; all sales managers must be in **Adventech Sales Managers**.

 If you do not load the BVAdvenTech sample application, you are prompted during installation for the name of your service. This name appears instead of Adventech (*MyService Sales Agents* and *MyService Sales Managers*).

4. Click **Save and Next** to save your changes to the user template and go to the third page of the Add User Template form. Click **Save** to save any further changes to the user template.

To enable an existing user template to put visitors in the appropriate closed-loop process management access groups:

1. Click **Edit** to the left of its name in the User Templates list to change the details of an existing user template.

The screenshot shows a web form titled "Edit User Template". The form has a purple header bar with the title. Below the header, there are several input fields and controls:

- User Template Name:** A text input field containing "Sanitation Engineer".
- Description:** A text input field containing "The people who keep things clean".
- Scripts:** A section containing two text input fields, each with a document icon to its right:
 - Personal Profile:** Contains the path "/adventech/scripts/common/changeProfile.".
 - Matching Profile:** Contains the path "/adventech/scripts/common/changeMatch.js".
- Status:** Two radio buttons: "On-line" (selected) and "Off-line".
- Page Type:** A dropdown menu currently showing "Employee".
- Select Qualifiers:** A section with a "Find" button and a dropdown menu currently showing "Role".

At the bottom of the form, there are two buttons: "Next" and "Reset".

2. Click Next to go to the second page of the Edit User Template form.

Click to enable visitors with the user template to work on leads on specified workflow states

Click to give visitors with the user template permission to add, edit, and delete lead owner organizations

The screenshot shows the 'Edit User Template' interface. The title bar reads 'Edit User Template'. Below it, the user template name is 'User Template Sanitation Engineer'. The 'Access Groups' section has a dropdown menu open, listing several groups. Two groups, 'Adventech Sales Agents' and 'Adventech Sales Managers', are circled in red. Below the dropdown is the 'Qualifiers' section, with 'Role' set to 'Business Development' and a checked box for 'Always Match This Qualifier'. At the bottom, there are 'Save and Next' and 'Reset' buttons.

3. Use the left mouse button to select **Adventech Sales Agents** to give visitors with this user template access to work on leads. Use the left mouse button to select **Adventech Sales Managers** to give the visitors with the user template permission to add, edit, and delete lead owner organizations. All users who are contacts for an owner organization must be in **Adventech Sales Agents**; all sales managers must be in **Adventech Sales Managers**.

▶ If you do not load the BVAdvenTech sample application, you are prompted during installation for the name of your service. This name will appear instead of Adventech.

4. Click **Save and Next** to save your changes to the user template and go to the third page of the Edit User Template form. Click **Save** to save any further changes to the user template.

4

Site Maintenance

InfoExchange Portal comes with features that enable you to configure and monitor your site.

The following topics are discussed in this chapter:

- [“Introduction,”](#) next
- [“Administering the filter cache”](#) on page 177
- [“Administering the home page cache”](#) on page 179
- [“Running InfoExchange Portal reports”](#) on page 180

Introduction

The *filter cache* lets you set the size of the cache used for storing the qualifiers of content.

The *home page cache* lets you enable, disable, and set the size of the cache used for recurring text displayed on a visitor’s home page.

The InfoExchange Portal Admin Tool comes with a series of *reports* you can run to obtain site information and statistics.

Administering the filter cache

The filter cache enables you to store qualifier values for content items either on disk or in memory. You can set the size of the cache used for storing the qualifiers of content. By using a filter cache you can speed up performance of your InfoExchange Portal site by not having to look up the qualifiers on content items multiple in the database each time.

The types of information to be stored in the filter cache are set in the `bv1to1.conf` file using the `ep_filter_enabled_cnt_types` parameter. For example:

```
ep_filter_enabled_cnt_types="EDITORIAL, PRODUCT"
```

There are several configuration parameters related to filtering and filter cache.

'ep_enable_qualifier'	When set to 1, InfoExchange Portal filters based on qualifiers for channels, programs and content. When set to 0, InfoExchange Portal does not perform any filtering, and the values of other filter related parameters will be ignored. In InfoExchange Portal 5.5.0 this was 'enable_km_classifiers'. The default value is 0.
'ep_filter_enabled_cnt_types'	Specifies the content types on which filtering will be applied. Content types no in this list will not be supported for content-level filtering. The default value is empty.
'ep_filter_cache_size'	Specifies the maximum number of content items with qualifiers to be cached. The default value is 10000.

When the system starts up, the setting specified in these parameters are in effect.

Customers may change the value of 'ep_filter_cache_size' at runtime through the InfoExchange Portal Filter Cache administration page to optimize the performance.

However, any changes through this page only affect the behavior of the running Interaction Managers. After reboot, the settings in the configuration parameters are effective. If you want to make the changes permanent, you need to change the settings of the configuration parameters.

Once you have set this variable in the `bv1to1.conf` file, follow these steps to use the InfoExchange Portal Admin Tool to set the maximum number of content items with qualifiers cached:

1. Select Filter Cache from the left menu. The Filter Cache form appears in the right frame.

Filter Cache

Enabling the Filter Cache speeds up response time for site visitors by caching the qualifiers that have been set on content items.

Content Types Enabled for Filtering: EDITORIAL, PRODUCT
These values are set in the bv1to1.conf file using the ep_filter_enabled_cnt_types parameter.

Limit:
Maximum number of content items with qualifiers cached in memory

2. You may want to Limit the number of content items with qualifiers that can be cached. For example, if your site has millions of content items, you might not want the filter cache to consume the memory for the entire site. Set the number of content items with qualifiers that can be cached in the box to the right of Limit.
3. To undo your changes, click the Reset button; otherwise, click the Save button to save your change to the filter cache limit.

Administering the home page cache

The home page cache lets you enable, disable, and set the size of the cache used for recurring items displayed on a visitor's home page. Enabling the home page cache speeds up performance of an InfoExchange Portal site when loading a home page.

The home page cache is modeled after the One-To-One Enterprise persistent request cache:

- Strings are saved to the file system in a directory structure based on a key.
- Strings are retrieved based on a key determined by the application.

Configurable home pages make it easy to add lots of blocks and programs, which in turn make the home page slower to generate. The home page cache stores the output of programs in blocks in the home page. When you use the home page cache, this output is stored as text on the file system, in memory, or in both, so some blocks do not have to be regenerated.

The InfoExchange Portal home page cache differs from the One-To-One Enterprise request cache in that it stores the text at program and block level rather than at page level.

The following default values are set in the `bv1to1.conf` file:

- `ep_text_cache_status` - sets the status of the InfoExchange Portal home page cache. A value of "0" disables the home page cache; a value of "1" enables it. For example:

```
ep_text_cache_status="1"
```

The default value of `ep_text_cache_status` is "1".

- `ep_text_cache_level` - determines how the InfoExchange Portal home page cache is stored:
 - A value of "0" indicates only memory is used for the home page cache.
 - A value of "1" indicates both system memory and the file system are used for the home page cache.
 - A value of "2" indicates only the file system is used for the home page cache.

```
ep_text_cache_level="1"
```

The default value of `ep_text_cache_level` is "1".

- `ep_text_cache_root` - the root directory where the InfoExchange Portal home page cache is stored. This parameter is required when `ep_text_cache_level` is set to "1" or "2".

```
ep_text_cache_root="/tmp"
```

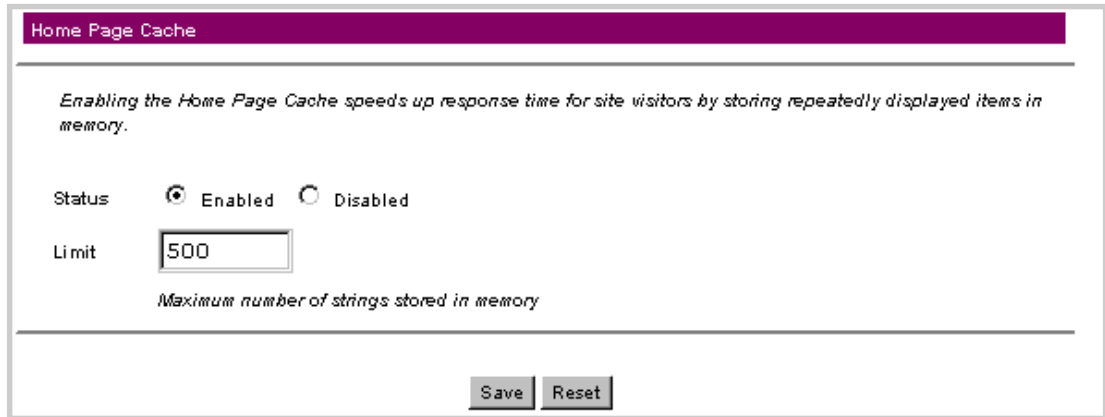
- `ep_text_cache_size` - the number of text strings allowed to stay in memory. This parameter is required when `ep_text_cache_level` is set to "0" or "1".

```
ep_text_cache_size="500"
```

The default value of `ep_text_cache_size` is "500".

You can also use the InfoExchange Portal Admin Tool to enable the home page cache or set the maximum of strings stored in memory by following these directions:

1. Select Home Page Cache from the left menu. The Home Page Cache form appears in the right frame.



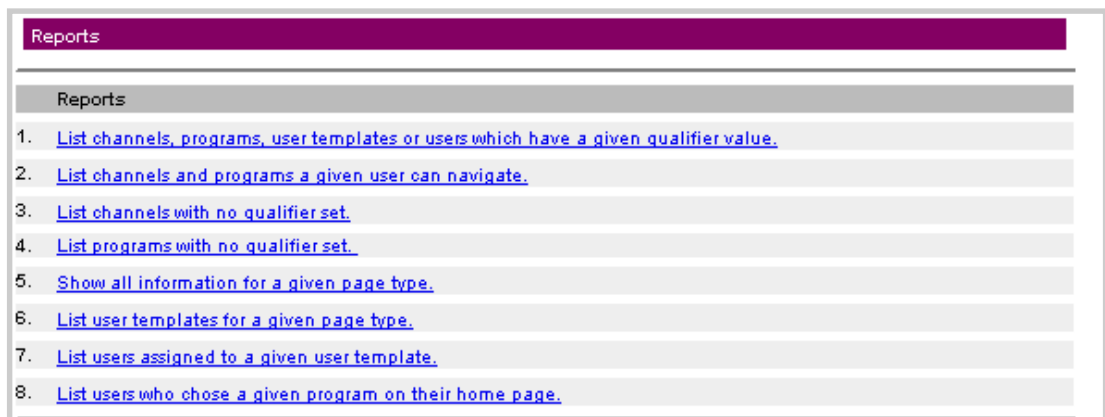
The screenshot shows a web form titled "Home Page Cache". At the top, a purple header bar contains the title. Below the header, a horizontal line separates the title from the main content. The main content area contains the following elements: a descriptive sentence "Enabling the Home Page Cache speeds up response time for site visitors by storing repeatedly displayed items in memory.", a "Status" section with two radio buttons: "Enabled" (which is selected) and "Disabled", a "Limit" section with a text input field containing the number "500", and a sub-label "Maximum number of strings stored in memory" below the input field. At the bottom of the form, there are two buttons: "Save" and "Reset".

2. To set the Status of the cache, select Enabled or Disabled.
3. You may want to change the Limit of strings that can be cached. For example, if a home page has many blocks that rarely change, you might want to increase the home page cache to improve performance for the site. Set the maximum number of strings that can be cached in the box to the right of Limit.
4. To undo your changes, select the Reset button; otherwise, select the Save button to save any changes you have made to the home page cache settings.

Any changes made through the Home Page Cache page at runtime are lost after restarting InfoExchange Portal. To make changes permanent you must edit the parameters in the `bv1tol.conf` file.

Running InfoExchange Portal reports

The InfoExchange Portal comes with a series of reports that return site information and statistics. To access these reports, select Reports in the left menu.



The screenshot shows a web page titled "Reports". At the top, a purple header bar contains the title. Below the header, a horizontal line separates the title from the main content. The main content area contains a list of eight reports, each with a number and a blue hyperlink: 1. [List channels, programs, user templates or users which have a given qualifier value.](#), 2. [List channels and programs a given user can navigate.](#), 3. [List channels with no qualifier set.](#), 4. [List programs with no qualifier set.](#), 5. [Show all information for a given page type.](#), 6. [List user templates for a given page type.](#), 7. [List users assigned to a given user template.](#), 8. [List users who chose a given program on their home page.](#)

The Reports window contains links to the following reports:

1. [List channels, programs, user templates or users which have a given qualifier value.](#)
2. [List channels and programs a given user can navigate.](#)
3. [List channels with no qualifier set.](#)
4. [List programs with no qualifier set.](#)
5. [Show all information for a given page type.](#)
6. [List user templates for a given page type.](#)
7. [List users assigned to a given user template.](#)
8. [List users who chose a given program on their home page.](#)

This section describes how to run these reports.

List channels, programs, user templates or users which have a given qualifier value

To run this report:

1. Select "[List channels, programs, user templates or users which have a given qualifier value.](#)" The window for that report appears.
2. Click Find under Select a Qualifier; a pop-up window appears in which you can view the list of qualifiers in the service in groups of ten. To find the qualifier you want to retrieve:
 - a. Enter a string in the Search box to return a list of qualifiers with names that contain the search string, or leave the search box blank to retrieve all qualifiers. Then click Search.Or
 - b. Select a letter under the Search box to retrieve all qualifiers that begin with that letter.
 - c. Select the radio button next to the qualifier you want to select.
 - d. Select the Cancel button to close the window without setting a qualifier, or select the Done button.

The qualifier appears in the Reports window next to the Find button, and a drop-down menu appears to the right of Qualifier Value.

3. Use the drop-down menu to select a Qualifier Value.
4. Use the Scope drop-down menu to determine whether to list Channels, Programs, User Templates, or Users with the specified qualifier value.
5. Select the List button to run the report.

List channels and programs a given user can navigate

To run this report:

1. Select "[List channels and programs a given user can navigate.](#)" The window for that report appears.
2. Click the Find button under Select a User. A pop-up window appears in which you can view the list of qualifiers in the service in groups of ten. To find a user:

- a. Enter all or part of the user name or login name of the visitors you want to find in the **User Name** box. To list all the user accounts, leave the **User Name** field empty.
- b. Enter the maximum number of results to be returned in the **Maximum Number to Find** box. The search is case-sensitive.
- c. To the right of **Search String**, select whether the Admin Tool searches for results beginning with the string or including the string by choosing either “**At beginning of login name or full name.**” or “**Anywhere in login name or full name.**”
- d. Use the left mouse button to select one of the visitors listed.
- e. Click **Find**.
- f. Select the **Done** button to return to the Reports page.


The user name appears in the Reports window next to the **Find** button.

3. Select the **List** button to run the report.

The results are a list of top-level channels you can navigate to see the channels and programs this visitor can see.


List channels with no qualifier set

To run this report, select “[List channels with no qualifier set](#)” The results for that report appear in groups of ten. You can edit or delete any channel listed using the [Edit] and [Delete] links, respectively, to the left of the channel name.

 See “[Administering channels](#)” on page 28 for information on how to edit or delete a channel.

List programs with no qualifier set

To run this report, select “[List programs with no qualifier set](#)” The results for that report appear in groups of ten. You can edit or delete any program listed using the [Edit] and [Delete] links, respectively, to the left of the program name.

 See “[Administering programs](#)” on page 44 for information on how to edit or delete a program.

Show all information for a given page type

To run this report:

1. Select “[Show all information for a given page type](#)” The window for that report appears.
2. Use the drop-down menu to select a **Page Type**.
3. Select the **Show** button to run the report.

The results show the **Page Type Name**, **Home Page Script**, **Number of Columns in Home Page**, and **Number of Entries in Required Blocks**, followed by a table listing the blocks that comprise the page type. You can edit or delete any block from the page type using the [Edit] and [Delete] links, respectively, to the left of the block name.

 See “[Administering home page types](#)” on page 69 for information on how to edit or delete a home page block.

List user templates for a given page type

To run this report:

1. Select “[List user templates for a given page type.](#)” The window for that report appears.
2. Use the drop-down menu to select a **Page Type**.
3. Select the **List** button to run the report.

The results are a list of user templates in groups of ten. You can edit or delete any user template listed using the **[Edit]** and **[Delete]** links, respectively, to the left of the user template name.

List users assigned to a given user template

To run this report:

1. Select “[List users assigned to a given user template.](#)” The window for that report appears.
2. Use the drop-down menu to select a **User Template**.
3. Select the **List** button to run the report.

The results are a list of user accounts in groups of ten. You can edit the user account settings or profile using the **[Settings]** and **[Profile]** links, respectively, to the left of the user name.

 See “[Administering user accounts](#)” on page 109 for information on how to edit a visitor’s **[Settings]** or **[Profile]**.

List users who chose a given program on their home page

To run this report:

1. Select “[List users who chose a given program on their home page.](#)” The window for that report appears.
2. Click the **Find** button under **Select a Program**. A pop-up window appears in which you can view the list of programs in the service. To find a program:
 - a. Enter all or part of the name of the program you want to find in the **Program Name** box. To list all programs, leave the **Program Name** field empty. The search is case-insensitive.
 - b. Enter the maximum number of results to be returned in the **Maximum Number to Find** box.
 - c. Use the left mouse button to select one of the programs listed.
 - d. Select the **Done** button to return to the **Reports** page.

The program name appears in the **Reports** window next to the **Find** button.

3. Select the **List** button to run the report.

The results are a list of user accounts in groups of ten. You can edit the user account settings or profile using the **[Settings]** and **[Profile]** links, respectively, to the left of the user name.

 See “[Administering user accounts](#)” on page 109 for information on how to edit a visitor’s **[Settings]** or **[Profile]**.

5

Command Line Utilities

This chapter describes the features and usage of command line utilities used in administering InfoExchange Portal. The utilities discussed in this chapter are:

- “The content purge utility” on page 185
- “The bulk loader utility” on page 186
- “Qualifier cache utilities” on page 209
- “Setting qualifiers on content items in a content type” on page 210

The content purge utility

The `km_purger` utility cleans up obsolete content bookmarks, such as bookmarks of visitors and user templates, obsolete product references, and obsolete alert specs on content items. When visitors delete content items from a content table through the One-To-One Command Center or through other applications, the bookmarked references to those content items become obsolete. Also, the references to these content items in the `BV_EP_PROJ_PROD` table become obsolete, and the alert specs on these content items become obsolete.

Over time, the bookmark tables `BV_KM_SUBSCRIBED` and `BV_KM_SUB_DEFAULTS` could end up with many obsolete content bookmarks. Also, table `BV_EP_PROJ_PROD` could end up with many obsolete product references, and table `BV_ALERT_SPEC` could end up with many obsolete alert specifications. Administrators can run this program to clean up the obsolete entries in these tables.

To remove entries in these tables that correspond to deleted content items, use the utility `$BV1T01/bin/km_purger`. The syntax of this utility is:


```
% $BV1T01/bin/km_purger [-h] service
```

where the `-h` option prints the usage message and `service` is the name of the service.

You can run `km_purger` from the UNIX command line or enter it into `crontab`.

For example, to remove obsolete entries in the above tables of the BV Adventech service, enter:

```
% $BV1T01/bin/km_purger Adventech
```

 It is safe to run the `km_purger` utility when there are no obsolete entries.

The `km_purger` utility does not depend on the session manager, but it does require One-To-One Enterprise to be running.

The bulk loader utility

Use the bulk loader (`km_loader`) utility to load large amounts of data into InfoExchange Portal at once. Unless you specify otherwise, `km_loader` flushes the cache in all running Interaction Managers after loading data.

Running the bulk loader utility

The command to use `km_loader` is:

```
$ $BV1T01/bin/km_loader [-v] [-f] [-s start_action ] [-n actions  
] data_file
```

where:

- `-v` is the flag for verbose mode.
- `-f` is the flag for “fast” mode; use only when the Interaction Manager is down. Running `km_loader` with this option turns off the flushing of the cache.
- `start_action` is an integer with value one or greater that specifies the action in the data file where `km_loader` starts to execute. For value *N*, `km_loader` skips the first *N*-1 actions in the data file and starts executing from the *N*th action. If the `-n` option is not present, `km_loader` executes actions to the end of the file.
- `actions` is an integer with value 1 or greater that specifies the number of actions to execute. For value *N*, `km_loader` starts from where the `-s` option specifies (if present) or from the first action in the data file until *N* actions are executed or the end of the data file is reached, whichever comes first.
- `data_file` is the name of the file containing the actions and data.

For example, to execute only the third action in the file `load.dat`, the command is:

```
km_loader -s 3 -n 1 load.dat
```

To execute only the third and fourth actions in the file `load.dat`, the command is:


```
km_loader -s 3 -n 2 load.dat
```

To execute from the third action to the end of the file `load.dat`, the command is:

```
km_loader -s 3 load.dat
```

To execute only the first three actions in the file `load.dat`, the command is:

```
km_loader -n 3 load.dat
```

 Running the `km_loader` utility in “fast” mode (using the `-f` option) causes your data to load more quickly because it turns off the flushing of the cache.

CAUTION If you are using a non-English character set, make sure you use the same character set used by One-To-One Enterprise when preparing the data for InfoExchange Portal. Using different character sets causes errors.

Formatting the bulk loader utility data file

The data file for `km_loader` consists of a sequence of actions. Each of these actions has an action keyword followed by one or more parameters in the format:

```
action parameter parameter parameter ...
```

The number of parameters varies depending on the action.

Lines starting with '#' are considered comments and are ignored; space, newline, and tab are separators.

Quoted strings are strings that must be enclosed in double quotes (as opposed to single quotes).

For an example of a bulk loader data file, see:

```
$BV1T01/erm_app/examples/adventech_data/kwa_obj/km_load_kwa_obj.dat.
```

Actions supported by the bulk loader utility

The following actions are supported by `km_loader`:

AddBlock	AddChannel
AddPageType	AddProgram
AddProgramType	AddQualifierValues
AddQualValsToChannel	AddQualValsToContent
AddQualValsToProgram	AddQualValsToUser
AddQualValsToUserTemplate	AddUserTemplate
BookmarkChannels	BookmarkContents
BookmarkPrograms	DeleteBlock
DeleteChannel	DeletePageType
DeleteProgram	DeleteProgramType
DeleteQualifier	DeleteUserTemplate
RemoveQualifierFromChannel	RemoveQualifierFromContent
RemoveQualifierFromProgram	RemoveQualifierFromUser
RemoveQualifierFromUserTemplate	RemoveQualValsFromChannel
RemoveQualValsFromContent	RemoveQualValsFromProgram
RemoveQualValsFromUser	RemoveQualValsFromUserTemplate
SetDefaultBookmarkedChannels	SetDefaultBookmarkedContents
SetDefaultBookmarkedPrograms	SetParentChannelsForProgram
SetProgramOrder	SetQualifier
SetQualValsForChannel	SetQualValsForContent

SetQualValsForProgram	SetQualValsForUser
SetQualValsForUserTemplate	UnbookmarkChannels
UnbookmarkContents	UnbookmarkPrograms

This section describes the syntax and use of these actions.

AddBlock

Defines a new block.

Syntax

```
AddBlock service block_name block_type page_type_name '{' program program
... program '}'
```

Parameter	Description
<i>service</i>	quoted string
<i>block_name</i>	quoted string
<i>block_type</i>	quoted string; either "REQUIRED", "OPTIONAL", or "DEFAULT"
<i>page_type_name</i>	quoted string; name of the page type to which the block belongs
<i>program</i>	quoted string; program name

AddChannel

Adds a channel.

Syntax

```
AddChannel service channel_name status description parent_channel_path
channel_manager_name channel_manager_email channel_page_type
channel_page_path
```

Parameter	Description
<i>service</i>	quoted string
<i>channel_name</i>	quoted string
<i>status</i>	quoted string; either "ONLINE" or "OFFLINE"
<i>description</i>	quoted string
<i>parent_channel_path</i>	quoted string; full path, "" indicates no parent channel
<i>channel_manager_name</i>	quoted string
<i>channel_manager_email</i>	quoted string
<i>channel_page_type</i>	quoted string; either "SCRIPT" or "URL"
<i>channel_page_path</i>	quoted string

AddPageType

Define a new configurable home page type.

Syntax *AddPageType service page_type_name display_script maximum_columns items_for_required_block*

Parameter	Description
<i>service</i>	quoted string
<i>page_type_name</i>	quoted string
<i>display_script</i>	quoted string; path to the home page script relative to the script root
<i>maximum columns</i>	number; maximum number of columns
<i>items_for_required_block</i>	number; maximum number of items displayed in each program of each required block in the page type

AddProgram

Adds a program into the database.

Syntax *AddProgram service program_name status description program_type include_subcategory show_only_readable program_src_type program_src_name program_src_content_type program_manager_name program_manager_email program_page_type path_of_program_page embed_script_path publish_script_path publish_category intcol1 intcol2 intcol3 strcol1 strcol2 strcol3 cacheable timeout*

Parameter	Description
<i>service</i>	quoted string
<i>program_name</i>	quoted string
<i>status</i>	quoted string; either "ONLINE" or "OFFLINE"
<i>description</i>	quoted string
<i>program_type</i>	quoted string; program type name
<i>include_subcategory</i>	quoted string; either "YES" or "NO"
<i>show_only_readable</i>	quoted string; either "YES" or "NO"
<i>program_src_type</i>	quoted string; either "RULE SET", "CATEGORY", or "CONTENT"
<i>program_src_name</i>	quoted string; rule set name, path of category, or content name
<i>program_src_content_type</i>	quoted string; content type name; see also <i>content_type</i> of AddProgramType action
<i>program_manager_name</i>	quoted string
<i>program_manager_email</i>	quoted string
<i>program_page_type</i>	quoted string; either "SCRIPT" or "URL"
<i>path_of_program_page</i>	quoted string; path relative to the script root of the page script for the program

Parameter	Description
<i>embed_script_path</i>	quoted string; path of the embedded block script relative to the script root
<i>publish_script_path</i>	quoted string; path of the Publishing Center script relative to the script root
<i>publish_category</i>	quoted string; full path of the Publishing Center category
<i>intcol1</i>	additional integer parameter for the page or block scripts
<i>intcol2</i>	additional integer parameter for the page or block scripts
<i>intcol3</i>	additional integer parameter for the page or block scripts
<i>strcol1</i>	quoted string; additional text parameter for the page or block scripts
<i>strcol2</i>	quoted string; additional text parameter for the page or block scripts
<i>strcol3</i>	quoted string; additional text parameter for the page or block scripts
<i>cacheable</i>	integer; a value of "1" if cacheable, otherwise "0"
<i>timeout</i>	integer; seconds until timeout (option when cacheable=0)

AddProgramType

Add a program type into the database.

Syntax

AddProgramType service program_type_name description content_type rule_set_category

Parameter	Description
<i>service</i>	quoted string
<i>program_type_name</i>	quoted string
<i>description</i>	quoted string
<i>content_type</i>	quoted string of content type name, for example, "PRODUCT", "AD", "EDITORIAL"
<i>rule_set_category</i>	quoted string; full path of the category

AddQualifierValues

Defines new values for a qualifier. If the given qualifier does not exist, create a new one with values. If one does exist, add the new qualifier values to the existing qualifier. When adding qualifier values to the existing qualifier, the qualifier values that already exist in the qualifier will be ignored. It also invalidates all entries in user qualifier cache and content qualifier cache in a service.

Syntax `AddQualifierValues service qualifier '{' value user_settable value user_settable ... value user_settable}'`

Parameter	Description
<i>service</i>	quoted string; service name
<i>qualifier</i>	quoted string; qualifier name
<i>value</i>	quoted string; qualifier value name
<i>user_settable</i>	integer; a value of "1" indicates the qualifier can be set by the visitor, a value of "0" indicates otherwise.

AddQualValsToChannel

Adds the specified qualifier values to the existing channel qualifier value settings. Qualifier values that have already been set on the channel will be ignored. It also invalidates the channel entry in the content qualifier cache.

Syntax `AddQualValsToChannel service channel recursiveFlag '{' qualifier '{' value value ... value }' qualifier '{' value value ... value }' ... qualifier '{' value value ... value }' }`

Parameter	Description
<i>service</i>	quoted string; service name
<i>channel</i>	quoted string; full path of channel
<i>recursiveFlag</i>	integer; a value of "1" means apply changes to all subchannels of this channel, otherwise set to "0"
<i>qualifier</i>	quoted string; qualifier name
<i>value</i>	quoted string; qualifier value name

AddQualValsToContent

Adds the specified qualifier values to the existing qualifier value settings for the content item. Qualifier values that have already been set on the content item will be ignored. It also invalidates the content item entry in the content qualifier cache.

Syntax

```
AddQualValsToContent service content_type content_name '{  
qualifier '{' value value ... value }'  
qualifier '{' value value ... value }'  
...  
qualifier '{' value value ... value }'  
'}'
```

Parameter	Description
<i>service</i>	quoted string; service name
<i>content_type</i>	quoted string; content type name. See “AddProgramType” for a list of valid content types.
<i>content_name</i>	quoted string; content name
<i>qualifier</i>	quoted string; qualifier name
<i>value</i>	quoted string; qualifier value name

AddQualValsToProgram

Adds the specified qualifier values to the existing qualifier value settings of the program. Qualifier values that have already been set on the program will be ignored. It also invalidates the program entry in the content qualifier cache.

Syntax

```
AddQualValsToProgram service program '{  
qualifier '{' value value ... value }'  
qualifier '{' value value ... value }'  
...  
qualifier '{' value value ... value }'  
'}'
```

Parameter	Description
<i>service</i>	quoted string; service name
<i>program</i>	quoted string; program name
<i>qualifier</i>	quoted string; qualifier name
<i>value</i>	quoted string; qualifier value name

AddQualValsToUser

Adds the specified qualifer values to the user's existing qualifier value settings. Qualifier values that have already been set on the user will be ignored. It also invalidates the user entry in the user qualifier cache.

Syntax

```
AddQualValsToUser service user '{'
qualifier '{' value value ... value '}'
qualifier '{' value value ... value '}'
...
qualifier '{' value value ... value '}'
}'
```

Parameter	Description
<i>service</i>	quoted string; service name
<i>user</i>	quoted string; user name
<i>qualifier</i>	quoted string; qualifier name
<i>value</i>	quoted string; qualifier value name

AddQualValsToUserTemplate

Adds the specified qualifer values to the existing qualifier value settings for the user template. Qualifier values that have already been set on the user template will be ignored. It also invalidates the user template entry in the content qualifier cache.

Syntax

```
AddQualValsToUserTemplate service user_template '{'
qualifier '{' value value ... value '}'
qualifier '{' value value ... value '}'
...
qualifier '{' value value ... value '}'
}'
```

Parameter	Description
<i>service</i>	quoted string; service name
<i>user_template</i>	quoted string; user template name
<i>qualifier</i>	quoted string; qualifier name
<i>value</i>	quoted string; qualifier value name

AddUserTemplate

Adds a user template into the database.

Syntax

```
AddUserTemplate service user_template_name description '{  
access_group_ID access_group_ID ... }' personal_profile_page  
matching_profile_page page_type_name
```

Parameter	Description
<i>service</i>	quoted string; service name
<i>user_template_name</i>	quoted string; name of user template
<i>description</i>	quoted string
<i>access_group_ID</i>	number; access group ID. Valid values are the result of the query "select GROUP_ID from BV_CP_ACCESS_GROUP where NAME=group_name"
<i>personal_profile_page</i>	quoted string; path from <i>script_root</i> to script for editing personal profile
<i>matching_profile_page</i>	quoted string; path from <i>script_root</i> to script for editing matching profile
<i>page_type_name</i>	quoted string

BookmarkChannels

Adds a list of channels as bookmarked channels for a visitor.

Syntax

```
BookmarkChannels service user_name '{ channel channel ... channel }'
```

Parameter	Description
<i>service</i>	quoted string
<i>user_name</i>	quoted string; visitor's login name (user alias)
<i>channel</i>	quoted string; full path of channel

BookmarkContents

Adds a list of content items as bookmarked content items for a visitor.

Syntax

```
BookmarkContents service user_name content_type '{ content content ...  
content }'
```

Parameter	Description
<i>service</i>	quoted string

Parameter	Description
<i>user_name</i>	quoted string; visitor's login name
<i>content_type</i>	quoted string; content type name see AddProgramType for valid content type names
<i>content</i>	quoted string; content name (key)

BookmarkPrograms

Adds a list of programs as bookmarked programs for a visitor.

Syntax `BookmarkPrograms service user_name '{ program program ... program }'`

Parameter	Description
<i>service</i>	quoted string
<i>user_name</i>	quoted string; visitor's login name
<i>program</i>	quoted string; program name

DeleteBlock

Deletes a block from a page type. This action also removes all references to this block in the user profile tables.

Syntax `DeleteBlock service block_name page_type_name`

Parameter	Description
<i>service</i>	quoted string
<i>block_name</i>	quoted string
<i>page_type_name</i>	quoted string; name of the page type containing the block

DeleteChannel

Deletes a channel and its subchannels in a service.

Syntax `DeleteChannel service channel_name`

Parameter	Description
<i>service</i>	quoted string
<i>channel_name</i>	quoted string; full path

DeletePageType

Deletes a configurable home page type. This action also deletes all the blocks of this page type and cleans up references to these blocks in the user profile tables. This action fails when the page type to be deleted is in use.

Syntax `DeletePageType service page_type_name`

Parameter	Description
<code>service</code>	quoted string
<code>page_type_name</code>	quoted string

DeleteProgram

Deletes a program in a service.

Syntax `DeleteProgram service program_name`

Parameter	Description
<code>service</code>	quoted string
<code>program_name</code>	quoted string

DeleteProgramType

Deletes a program type in a service. This action fails when the program type to be deleted is in use.

Syntax `DeleteProgramType service program_type_name`

Parameter	Description
<code>service</code>	quoted string
<code>program_type_name</code>	quoted string

DeleteQualifier

Deletes a qualifier in a service. It also cleans up references to the qualifier from channels, programs, visitors, user templates, and content items.

Syntax `DeleteQualifier service qualifier`

Parameter	Description
<i>service</i>	quoted string; service name
<i>qualifier</i>	quoted string; qualifier name

DeleteUserTemplate

Deletes a user template in a service. This action fails when the user template to be deleted is in use.

Syntax `DeleteUserTemplate service user_template_name`

Parameter	Description
<i>service</i>	quoted string
<i>user_template_name</i>	quoted string

RemoveQualifierFromChannel

Removes the specified qualifier from the channel's qualifier value settings. Qualifiers not set on the channel are ignored. This function also invalidates the channel's entry in the content qualifier cache.

Syntax `RemoveQualifierFromChannel service channel qualifier recursive_flag`

Parameter	Description
<i>service</i>	quoted string; service name.
<i>channel</i>	quoted string; full path.
<i>qualifier</i>	quoted string; qualifier name.
<i>recursive_flag</i>	either "1" to have the changes apply all subchannels of the specified channel, or "0" to only have the changes apply to the parent channel.

RemoveQualifierFromContent

Removes the specified qualifier from the content item's qualifier value settings. Qualifiers not set on the content item are ignored. This function also invalidates the content item's entry in the content qualifier cache.

Syntax `RemoveQualifierFromContent service content_type content_name qualifier`

Parameter	Description
<i>service</i>	quoted string; service name
<i>content_type</i>	quoted string; content type name. See "AddProgramType" for a list of valid content types.
<i>content_name</i>	quoted string; content name
<i>qualifier</i>	quoted string; qualifier name

RemoveQualifierFromProgram

Removes the specified qualifier from the program's qualifier value settings. Qualifiers not set on the program are ignored. This function also invalidates the program's entry in the content qualifier cache.

Syntax `RemoveQualifierFromProgram service program qualifier`

Parameter	Description
<i>service</i>	quoted string; service name
<i>program</i>	quoted string; program name
<i>qualifier</i>	quoted string; qualifier name

RemoveQualifierFromUser

Removes the specified qualifier from the user's qualifier settings. Qualifiers not set on the user are ignored. This function also invalidates the user account's entry in the content qualifier cache.

Syntax `RemoveQualifierFromUser service user qualifier`

Parameter	Description
<i>service</i>	quoted string; service name
<i>user</i>	quoted string; user name
<i>qualifier</i>	quoted string; qualifier name

RemoveQualifierFromUserTemplate

Removes the specified qualifier from the user template's qualifier settings. Qualifiers not set on the user template are ignored. This function also invalidates the user template's entry in the content qualifier cache.

Syntax `RemoveQualifierFromUserTemplate service user_template qualifier`

Parameter	Description
<i>service</i>	quoted string; service name
<i>user_template</i>	quoted string; user template name
<i>qualifier</i>	quoted string; qualifier name

RemoveQualValsFromChannel

Removes the specified qualifier values from the channel's qualifier value settings. Qualifier values not set on the channel are ignored. This function also invalidates the channel's entry in the content qualifier cache.

Syntax `RemoveQualValsFromChannel service channel recursive_flag '{' qualifier '{' value value ... value '}' ... qualifier '{' value value ... value '}' '}'`

Parameter	Description
<i>service</i>	quoted string; service name.
<i>channel</i>	quoted string; full path.
<i>recursive_flag</i>	either "1" to have the changes apply all subchannels of the specified channel, or "0" to only have the changes apply to the parent channel.
<i>qualifier</i>	quoted string; qualifier name.
<i>value</i>	quoted string; qualifier value name.

RemoveQualValsFromContent

Removes the specified qualifier values from the content item's qualifier value settings. Qualifier values not set on the content item are ignored. This function also invalidates the content item's entry in the content qualifier cache.

```
RemoveQualValsFromContent service content_type content_name '{'  
qualifier '{' value value ... value }'  
qualifier '{' value value ... value }'  
...  
qualifier '{' value value ... value }'  
'}'
```

Parameter	Description
<i>service</i>	quoted string; service name
<i>content_type</i>	quoted string; content type name. See "AddProgramType" for a list of valid content types.
<i>content_name</i>	quoted string; content name
<i>qualifier</i>	quoted string; qualifier name
<i>value</i>	quoted string; qualifier value name

RemoveQualValsFromProgram

Removes the specified qualifier values from the program's qualifier value settings. Qualifier values not set on the program are ignored. This function also invalidates the program's entry in the content qualifier cache.

Syntax

```
RemoveQualValsFromProgram service program '{'  
qualifier '{' value value ... value }'  
qualifier '{' value value ... value }'  
...  
qualifier '{' value value ... value }'  
'}'
```

Parameter	Description
<i>service</i>	quoted string; service name
<i>program</i>	quoted string; program name
<i>qualifier</i>	quoted string; qualifier name
<i>value</i>	quoted string; qualifier value name

RemoveQualValsFromUser

Removes the specified qualifier values from the user's qualifier value settings. Qualifier values not set on the user are ignored. This function also invalidates the user account's entry in the content qualifier cache.

Syntax

```
RemoveQualValsFromUser service user '{'
qualifier '{' value value ... value '}'
qualifier '{' value value ... value '}'
...
qualifier '{' value value ... value '}'
'}
```

Parameter	Description
<i>service</i>	quoted string; service name
<i>user</i>	quoted string; user name
<i>qualifier</i>	quoted string; qualifier name
<i>value</i>	quoted string; qualifier value name

RemoveQualValsFromUserTemplate

Removes the specified qualifier values from the user template's qualifier value settings. Qualifier values not set on the user template are ignored. This function also invalidates the user template's entry in the content qualifier cache.

Syntax

```
RemoveQualValsFromUserTemplate service user_template '{'
qualifier '{' value value ... value '}'
qualifier '{' value value ... value '}'
...
qualifier '{' value value ... value '}'
'}
```

Parameter	Description
<i>service</i>	quoted string; service name
<i>user_template</i>	quoted string; user template name
<i>qualifier</i>	quoted string; qualifier name
<i>value</i>	quoted string; qualifier value name

SetDefaultBookmarkedChannels

Sets a list of channels as default bookmarked channels for a user template in a service. This action overwrites any existing default bookmarked channels for the specified user template.

Syntax `SetDefaultBookmarkChannels service user_template_name '{' channel channel ... channel '}'`

Parameter	Description
<i>service</i>	quoted string
<i>user_template_name</i>	quoted string; user template name
<i>channel</i>	quoted string; full path of channel

SetDefaultBookmarkedContents

Sets a list of content items as default bookmarked content items for a user template in a service. This action overwrites any existing default bookmarked content items for that user template.

Syntax `SetDefaultBookmarkContents service user_template_name content_type '{' content content ... content '}'`

Parameter	Description
<i>service</i>	quoted string
<i>user_template_name</i>	quoted string; user template name
<i>content_type</i>	quoted string of content type name, for example, "PRODUCT", "AD", "EDITORIAL"
<i>content</i>	quoted string; content name (key)

SetDefaultBookmarkedPrograms

Sets a list of programs as default bookmarked programs for a user template in a service. This action overwrites any existing default bookmarked programs for that user template.

Syntax `SetDefaultBookmarkedPrograms service user_name '{' program program ... program '}'`

Parameter	Description
<i>service</i>	quoted string
<i>user_name</i>	quoted string; visitor's login name
<i>program</i>	quoted string; program name

SetParentChannelsForProgram

Sets the parent channels for a program.

Syntax

```
SetParentChannelsForProgram service program_name '{ parent_channel
parent_channel ... }'
```

Parameter	Description
<i>service</i>	quoted string
<i>program_name</i>	quoted string
<i>parent_channel</i>	quoted string; full path

SetProgramOrder

Sets the display order of a program in a channel.

Syntax

```
SetProgramOrder service program_name parent_channel display_order
```

Parameter	Description
<i>service</i>	quoted string
<i>program_name</i>	quoted string
<i>parent_channel</i>	quoted string; full path
<i>display_order</i>	numeric value; starts at 1

SetQualifier

Sets the values of a qualifier. If the named qualifier exists, the existing one is replaced with the new data and all references to the qualifier values of the old qualifier are removed from all channels, programs, user accounts, user templates, and content items. If the named qualifier does not exist, a new qualifier is created.

Syntax

```
SetQualifier service qualifier_name '{ value user_settable value
user_settable ... value user_settable}'
```

Parameter	Description
<i>service</i>	quoted string
<i>qualifier_name</i>	quoted string
<i>editable</i>	whether editable by the visitor; "YES" or "NO"
<i>value</i>	quoted string; qualifier value name
<i>user_settable</i>	integer; a value of "1" indicates the qualifier can be set by the visitor, a value of "0" indicates otherwise.

SetQualValsForChannel

Sets qualifier values for a channel in a service. This action overwrites any existing qualifier values set for the channel.

Syntax

```
SetQualValsForChannel service channel recursiveFlag '{'  
qualifier '{' value value ... value }'  
qualifier '{' value value ... value }'  
...  
qualifier '{' value value ... value }'  
'}'
```

Parameter	Description
<i>service</i>	quoted string; service name
<i>channel</i>	quoted string; full path
<i>recursiveFlag</i>	integer; a value of "1" means apply changes to all subchannels of this channel, otherwise set to "0"
<i>qualifier</i>	quoted string; qualifier name
<i>value</i>	quoted string; qualifier value name

SetQualValsForContent

Sets qualifier values for a content item in a service. This action overwrites any existing qualifier values set for the content item.

Syntax

```
SetQualValsForContent service content_type content_name '{'  
qualifier '{' value value ... value }'  
qualifier '{' value value ... value }'  
...  
qualifier '{' value value ... value }'  
'}'
```

Parameter	Description
<i>service</i>	quoted string; service name
<i>content_type</i>	quoted string; content type name. See "AddProgramType" for a list of valid content types.
<i>content_name</i>	quoted string; content name
<i>qualifier</i>	quoted string; qualifier name
<i>value</i>	quoted string; qualifier value name

SetQualValsForProgram

Sets qualifier values for a program in a service. This action overwrites any existing qualifier values set for the program.

Syntax

```
SetQualValsForProgram service program '{'
qualifier '{' value value ... value '}'
qualifier '{' value value ... value '}'
...
qualifier '{' value value ... value '}'
'}
```

Parameter	Description
<i>service</i>	quoted string; service name
<i>program</i>	quoted string; program name
<i>qualifier</i>	quoted string; qualifier name
<i>value</i>	quoted string; qualifier value name

SetQualValsForUser

Sets qualifier values for a user account in a service. This action overwrites any existing qualifier values set for the user account.

Syntax

```
SetQualValsForUser service user '{'
qualifier '{' value value ... value '}'
qualifier '{' value value ... value '}'
...
qualifier '{' value value ... value '}'
'}
```

Parameter	Description
<i>service</i>	quoted string; service name
<i>user</i>	quoted string; visitor's login name
<i>qualifier</i>	quoted string; qualifier name
<i>value</i>	quoted string; qualifier value name

SetQualValsForUserTemplate

Sets qualifier values for a user template in a service. This action overwrites any existing qualifier values set for the user template.

Syntax

```
SetQualValsForUserTemplate service user_template '{  
  qualifier '{ value value ... value }'  
  qualifier '{ value value ... value }'  
  ...  
  qualifier '{ value value ... value }'  
}'
```

Parameter	Description
<i>service</i>	quoted string; service name
<i>user_template</i>	quoted string; user template name
<i>qualifier</i>	quoted string; qualifier name
<i>value</i>	quoted string; qualifier value name

UnbookmarkChannels

Removes a list of channels as bookmarked channels for a visitor.

Syntax

```
UnbookmarkChannels service user_name '{ channel channel ... channel }'
```

Parameter	Description
<i>service</i>	quoted string
<i>user_name</i>	quoted string; visitor's login name
<i>channel</i>	quoted string; full path of channel

UnbookmarkContents

Removes a list of content items as bookmarked content items for a visitor.

Syntax

```
UnbookmarkContents service user_name content_type '{ content content ...  
content }'
```

Parameter	Description
<i>service</i>	quoted string
<i>user_name</i>	quoted string; visitor's login name
<i>content_type</i>	quoted string; content type name see AddProgramType for valid content type names
<i>content</i>	quoted string; content name (key)

UnbookmarkPrograms

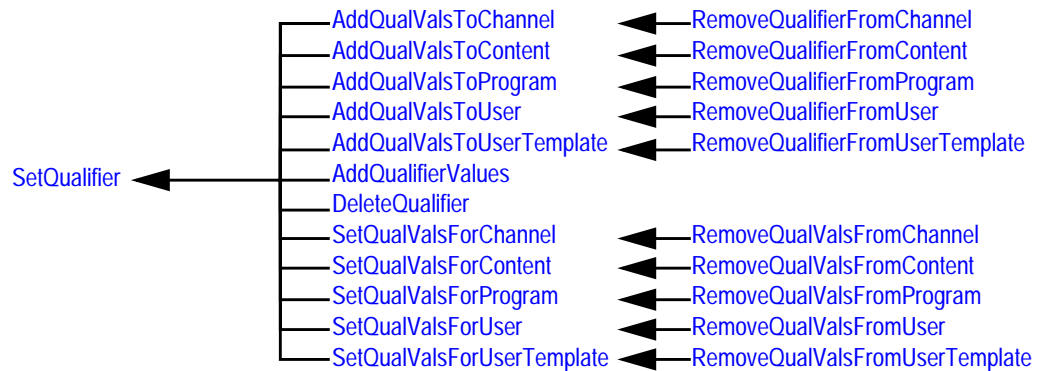
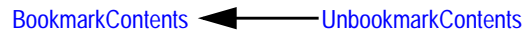
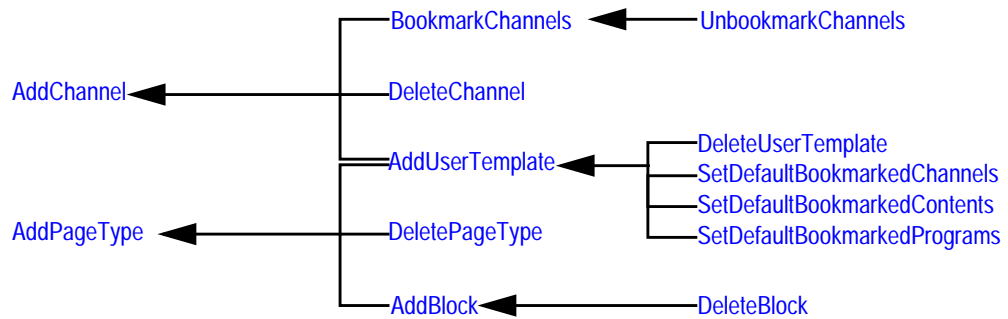
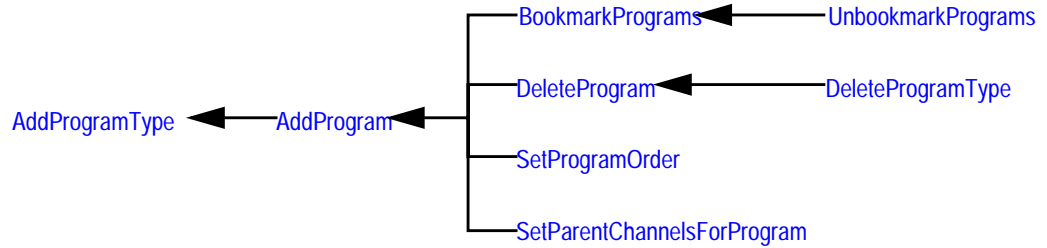
Removes a list of programs as bookmarked programs for a visitor.

Syntax `UnbookmarkPrograms service user_name '{ program program ... program }'`

Parameter	Description
<i>service</i>	quoted string
<i>user_name</i>	quoted string; visitor's login name
<i>program</i>	quoted string; program name

Dependencies when loading data

Some actions are dependent upon other actions when you are loading data. The following charts show which actions have prerequisite actions, with the prerequisite actions on the left.



Qualifier cache utilities


InfoExchange Portal comes with two sample JavaScript files located in the directory `$BVT01/knowledge/admin/scripts` that dump the qualifier caches, including the filter cache (`dump.js`) and load the qualifier caches, including filter cache (`load.js`). You can use the cache warmup utility that ships with One-To-One Enterprise samples to run these scripts. The `BVI_ContentManager::dumpcache` method is described in the *BroadVision One-To-One Enterprise Application Programmer's Reference*.

One-To-One Enterprise includes a set of sample scripts for using `dumpcache()` and `cachewarmup()`. The sample scripts and a README file are located in:

```
$BVT01/samples/cache_warmup
```

Follow the directions in the README file in `$BVT01/samples/cache_warmup` but replace the `load.js` and `dump.js` files with the ones from `$BVT01/knowledge/admin/scripts`.

If you have a large, high traffic site, dumping the qualifier caches to a file before shutting down the IMs, and loading qualifier caches from a file after bringing up the IMs will improve the performance when navigating through channels, programs, and content.

 You must have the `System_Admin` role to run these scripts. See the Content, Profiles and Personalization chapter in the *BroadVision One-To-One Enterprise Overview* for information about visitor roles.

Dumping the qualifier cache to a file

InfoExchange Portal caches qualifiers for channels, programs, and content as visitors navigate the site and view channels, programs, and content. While running the Interaction Manager, the One-To-One Enterprise system administrator can use the command line utility `cwarmup` to save the IDs of the items in the cache to a dump file.

To dump the data in the qualifier cache to a file, enter:

```
cwarmup download -dump path
             -script $BVT01/knowledge/admin/scripts/dump.js
             -user iepadmin [-application appName] [-service serviceName>
```

where:

<i>path</i>	The path to a file where the dumped data will be stored.
<i>appName</i>	The IM application name.
<i>serviceName</i>	Name of the current service. For example, Adventech.

Loading the qualifier cache from a file

The next time the Interaction Manager is shutdown and then restarted, the One-To-One Enterprise system administrator can use the `cwarmup` utility to load the qualifier caches (including the filter cache) using the IDs in the dump file.

To load the qualifier cache from a file that was created by the `cwarmup download` script, enter:

```
cwarmup upload
  -script $BV1T01/knowledge/admin/scripts/load.js
  -dump path -user iepadmin [-application appName]
```

where:

<code>path</code>	The path to a file where the dumped data will be stored.
<code>appName</code>	The IM application name.

Setting qualifiers on content items in a content type

To configure your site so you can set qualifiers on content items in a content type, you must do the following:

1. Add your content type to the end of the parameter `ep_filter_enabled_cnt_types` in the `bv1t01.conf` file. For example:

```
ep_filter_enabled_cnt_types="EDITORIAL, PRODUCT, EP_LEAD"
```

2. Run the utility `add_qv_list_table` located in the `dbschema` directory. The syntax is:

```
add_qv_list_table service content_type content_name
```

where:

<code>service</code>	Service name if the content type is service-specific, otherwise it must be set to <code>ALL_STORE</code> .
<code>cnt_type</code>	Content type ID, for example, "2" for <code>EDITORIAL</code> or "301" for <code>KM_PROGRAM</code> .
<code>cnt_name</code>	Content type name, for example, "EDITORIAL" or "KM_PROGRAM".

For example:

```
add_qv_list_table "ALL_STORE" 308 "EP_LEAD"
```

3. If the Interaction Manager and One-To-One Enterprise servers are running, shut them down and restart them for the configuration changes to take effect.

```
% $BV1T01/bin/imgr_conf -a stop
% $BV1T01/bin/bvconf shutdown
% $BV1T01/bin/bvconf execute
% $BV1T01/bin/imgr_conf -a start
```

6

Getting Technical Support

Technical Support services are provided on an annual basis to BroadVision customers. A standard 90-day warranty is also provided with all software.

If you experience problems in using any of BroadVision's software products, contact BroadVision's World-wide Customer Support Organization for assistance. Registered customers who have a login name and password can report problems via BroadVision's Web site www.broadvision.com. On the Web site you can access support-related technical information, report problems, and track report status and responses on the Problem Reports pages. To request a login, please contact your BroadVision Account Representative.

The Web site is the preferred method of reporting problems; however, if necessary you can report problems via e-mail to bvhelp@broadvision.com. Please be sure to include the case ID when communicating via e-mail.

Information on how to contact Customer Support offices by telephone can be found on the BroadVision Web site.

Support for Third-Party Software Products

To allow for complete testing, BroadVision certifies BroadVision One-To-One products against the versions of third-party products that are released and available sufficiently in advance of the software release date. This often means that third-party vendors release new versions of their products prior to the next release of the BroadVision software. While BroadVision would prefer that customers use the tested and certified software versions, we also understand that customers will occasionally want or need to use these new versions of third-party products. As long as the vendor guarantees forward compatibility, One-To-One products should work on these new versions.

BroadVision will usually test and certify these newer versions of third-party products in the next product release. This can be a good indicator that the newer versions will work with the previous release. In exceptional cases BroadVision may determine that the newer version of a third-party product cannot be used because it fails in some way during the testing cycle. In this case we will continue to certify the older version.

BroadVision will support customers who use newer versions of third-party products by working with the customer to resolve compatibility problems with the third-party vendor. BroadVision will also consider, at our option, developing and releasing minor fixes for our products in order to resolve problems with new versions of third-party products.



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