PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook

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About This PeopleBook

The book provides you with the information that you need to implement and use PeopleSoft Portals Application Fundamentals. You can order the online version by requesting SKU PS8SP2r0, or the hard-copy version by requesting SKU MAAFr8SP2B 1200.

This section describes information that you should know before you begin working with PeopleSoft products and documentation, including PeopleSoft-specific documentation conventions, information specific to the PeopleSoft Portal Solutions product line, how to order additional copies of our documentation, and so on.

Before You Begin

To benefit fully from the information covered in this book, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

You should be familiar with navigating around the system and adding, updating, and deleting information using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft® Windows or Windows NT graphical user interface.

Because we assume that you already know how to navigate around the PeopleSoft system, much of the information in this book is not procedural. That is, it does not typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with all the information that you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. This book expands on the material covered in PeopleSoft training classes.

PeopleSoft Portals Application Fundamentals

PeopleSoft Portals Application Fundamentals covers important topics that apply to many or all PeopleSoft applications across the PeopleSoft Portal Solutions product line. Whether you are implementing only PeopleSoft Employee Portal, some combination of products within the product line (for example, PeopleSoft Customer Portal, Supplier Portal, Enterprise Portal, Campus Portal, and Government Portal), or the entire PeopleSoft Portal Solutions, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals such as understanding and administering pagelets.

In the *PeopleSoft Portals Application Fundamentals* PeopleBook, we discuss common information pertinent to all applications in the PeopleSoft Portal Solutions product line. This makes the documentation as a whole less redundant. Throughout each PeopleBook, we provide cross-references to *PeopleSoft Portals Application Fundamentals* and to other PeopleBooks.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection (www.peoplesoft.com). We post updates and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection web site: http://www.peoplesoft.com/

You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of Customer Connection, you can download files to add to your PeopleBook library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM PeopleSoft 8 Service Pack 2 Portal Solutions PeopleBooks, SKU PSB8SP2R0.

Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to some of the PeopleBooks listed here.

The CD includes the following PeopleBooks (presented in HTML format) that you can print in whole or in part:

- PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook
- PeopleSoft 8 Campus Portal PeopleBook
- PeopleSoft 8 Enterprise Portal SP2 PeopleBook
- PeopleSoft 8 Government Portal PeopleBook
- PeopleSoft Customer Portal PeopleBook

- PeopleSoft 8 Employee Portal SP2 PeopleBook
- PeopleSoft Supplier Portal PeopleBook
- PeopleSoft Enterprise Integration PeopleBook
- PeopleTools 8.12 PeopleBook
- Using PeopleBooks
- Using PeopleSoft Applications PeopleBook

Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press web site from the Documentation section of PeopleSoft Customer Connection. The PeopleSoft Press web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

Internet	From the main PeopleSoft internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order. PeopleSoft internet site: http://www.peoplesoft.com/.
Telephone	Contact Consolidated Publishing Incorporated (CPI) at 800 888 3559.
Email	Email CPI at callcenter@conpub.com.

Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

`monospace font`	Indicates a code example.
Bold	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold).
Cross-references	The phrase "For more information" indicates where you can find additional documentation on the topic at hand. • Capitalized titles in *italics* indicate the title of another PeopleBook. For example: For more information about billing, see *PeopleSoft 8.00.01 Billing PeopleBook.* • Capitalized titles in *italics* followed by chapter title in quotes refer to a chapter in another PeopleBook. For example: For more information about establishing rate templates, see PeopleSoft 8.00.01 Projects PeopleBook, “Integrating With PeopleSoft Billing and PeopleSoft Contracts”. • Capitalized titles in quotes refer to another chapter of this PeopleBook. For example: For more information about contract status security, see “Securing Your PeopleSoft Contracts System”. • Capitalized titles refer to sections within this chapter of this PeopleBook. For example: For more information about Defining Contract Statuses, see Defining Your Own Contract Statuses.
Italics	Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears, we use this style: ***field value.*** We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number *0,* not the letter *O.*
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.

Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!,** the note is crucial and includes information that concerns what you need to do for the system to function properly.

Text in this bar indicates For more information cross-references to related or additional information.

Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Page and Panel Introductory Table

In the documentation, each page or panel description in the application includes an introductory table with pertinent information about the page. Not all of the information will be available for all pages or panels.

Usage	Describes how you would use the page, panel, or process.
Object Name	Gives the system name of the page, panel, or process as specified in PeopleTools Application Designer. For example, the Object Name of the Detail Calendar page is DETAIL_CALENDAR1.
Navigation	Provides the path for accessing the page, panel, or process.
Prerequisites	Specifies which objects must have been defined before you use the page, panel, or process.
Access Requirements	Specifies the keys and other information necessary to access the page or panel. For example, **SetID** and **Calendar ID** are required to open the Detail Calendar page.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed, about our documentation, PeopleBooks, and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft HRMS Product Documentation Manager
PeopleSoft, Inc.
4460 Hacienda Drive
Pleasanton, CA 94588

Or send comments by email to the authors of PeopleSoft documentation at:

DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

CHAPTER 1

Using Third-Party Email and Calendar Events

PeopleSoft Portal Solutions offer homepage pagelets that enable employees to access email and calendar information without leaving the portal. The portal administrator sets up a default mail system and can optionally enable external POP3 mail systems as well. Then employees configure their own homepage Email and Calendar Events pagelets with their ID and password. If the administrator enables multiple mail systems, employees can also choose to include mail from multiple systems in their Email pagelet.

Because the Email and Calendar Events pagelets share the same integration technology, your employees have to install and set up these pagelets only once. For the homepage, however, employees must separately select each pagelet to be included.

Email Integration

The Email pagelet displays a list of the latest email messages. If the email system is web-enabled, employees can also navigate into that email system from a link on the pagelet. Integrations are delivered for Lotus Notes/Domino, Microsoft Outlook Web Access/Exchange, and Post Office Protocol (POP) mail systems.

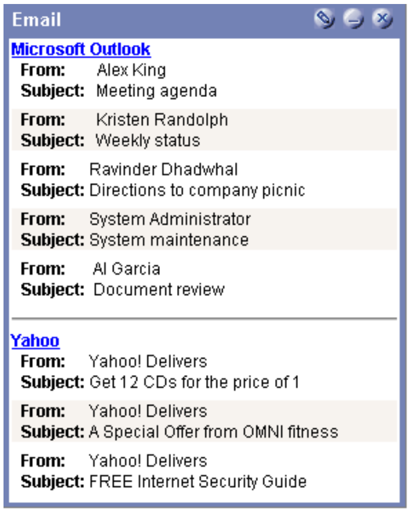
Calendar Integration

The Calendar Events pagelet displays appointments for the current day. Integrations are delivered for Lotus Notes/Domino and Microsoft Outlook Web Access/Exchange.

Email Pagelet

Before you can use the Email pagelet, you must first add it to your homepage.

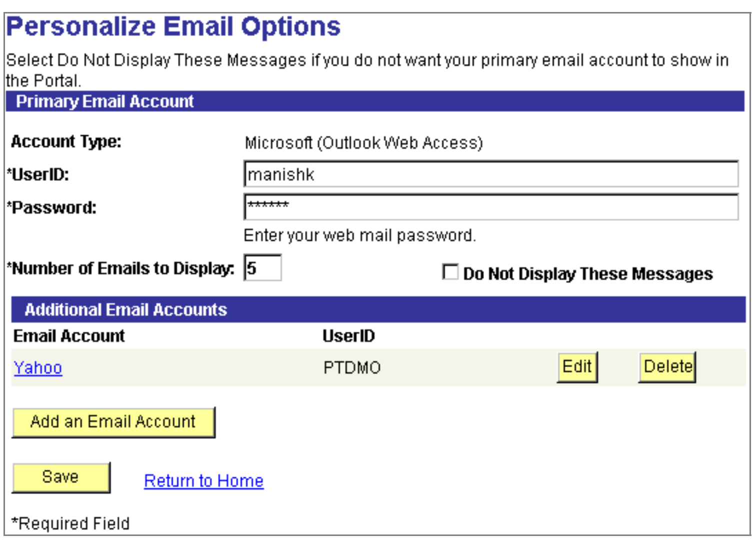
For more information about how to add pagelets to your homepage, refer to the chapter Working with Homepages in the *PeopleTools Portal Technology PeopleBook.*



Email pagelet

Personalizing Email Options

Usage	Use the Personalize Email Options page to specify the employee user email ID and password and the number of most recent email messages that should appear on the Email pagelet. The top section is the company's designated primary email system. The bottom section, Additional Email Profiles, allows the addition of external POP3 mail accounts.
Object Name	EO_PE_EML_PREF
Navigation	Click the Customize button (pencil icon) in the Email pagelet title bar.



Personalize Email Options page

Primary Email Account

Account Type

This is the organization's primary mail system as set up by the portal administrator.

UserID

Enter the user ID that corresponds to the Mail Type.

Password

Enter the web mail password.

Note. For Lotus Notes, use the internet password. This is the password stored in the Person document in the Lotus Name and Address Book on the Domino server.

Number of Emails to Display

Specify the number of messages the system should display on the pagelet.

Do Not Display These Messages

Select this check box to have no messages appear on the pagelet. This feature can be used to temporarily hide an email account.

Additional Email Accounts

Email Account

The list of email profile names set up on the Add an Email Account page. When you clicking the account name link, the Update an Email Account page appears.

For more information, see Adding Personal Email Accounts.

UserID

The user ID whose mail messages will appear in the pagelet.

Edit

Click the **Edit** button to display the Update an Email Account page and make changes to the email account setup information.

For more information, see Updating Personal Email Accounts.

Delete

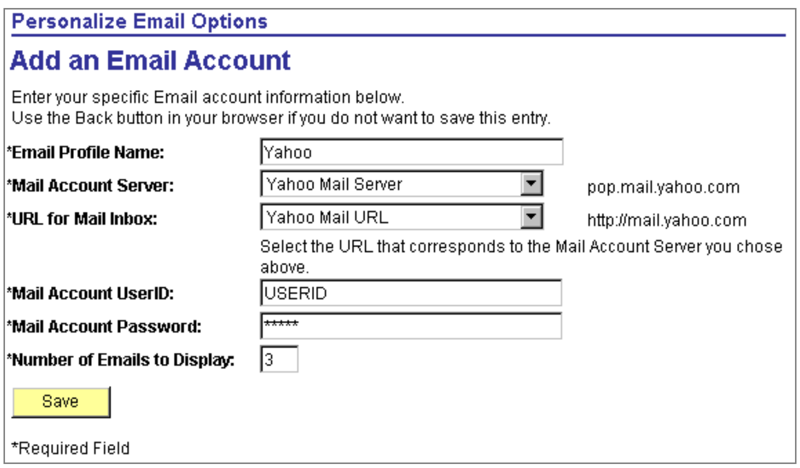
Click the **Delete** button to permanently remove the email account from the pagelet.

Click the **Add New Email Account** button to display the Add an Email Account page to add new email accounts. The portal administrator predefines the account choices.

For more information, see Adding Personal Email Accounts.

Adding Personal Email Accounts

Usage	Use the Add an Email Account page to add a new personal external email account. Add any number of POP3 mail accounts. The portal administrator predefines the account choices. Contact the portal administrator to add external email systems to the choices list.
Object Name	EO_PE_EML_PREF
Navigation	Click the Add New Email Account button on the Personalize Email Options page.



Add an Email Account page

Email Profile Name Enter a unique email profile name. This is the mail identifier that appears in the pagelet.

Mail Account Server Select the appropriate server from the drop down list box. Contact the portal administrator to add an additional POP3 email server.

URL to Launch
Select the appropriate mail URL from the drop down list box. To add a URL, contact the system administrator.

Note. Make sure that the URL selection corresponds to the Mail Account Server.

Mail Account UserID
Enter the email user ID.

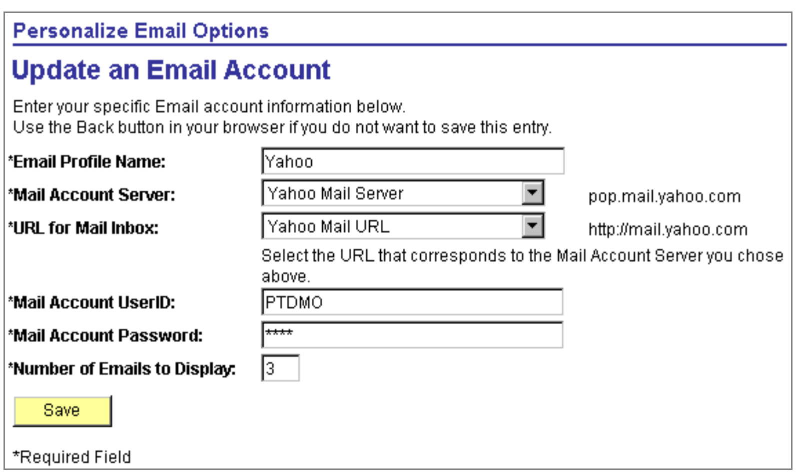
Mail Account Password
Enter the email password.

Number of Emails to Display
Specify how many emails the system should display on the Email pagelet for this mail profile.

The email account must be set up to POP forward in order for it to display on the Email pagelet. Check your profile with the POP mail vendor.

Updating Personal Email Accounts

Usage	Use the Update Email Account page to edit existing personal external email accounts. The portal administrator predefines the account choices. Contact the portal administrator to add external email systems to the choices list.
Object Name	EO_PE_EML_PREF
Navigation	Click the Edit button on the Personalize Email Options page.

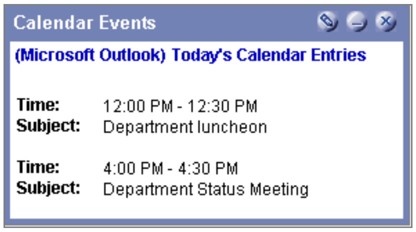


Personalize Email Options - Update an Email Account page

For page entry instructions, see Adding Personal Email Accounts.

Calendar Events Pagelet

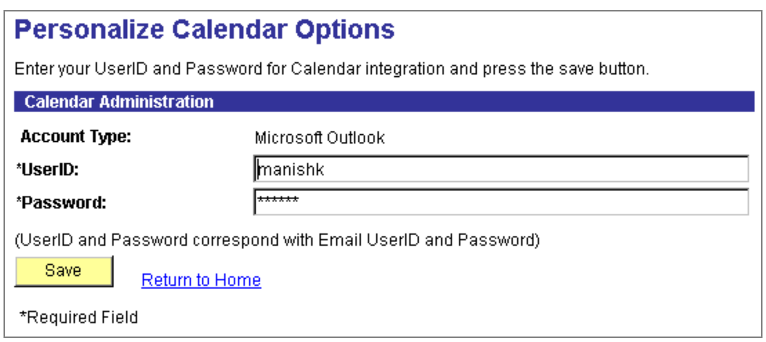
The following screen illustration shows the Calendar Events pagelet.



Calendar Events pagelet

Personalize Calendar Options Page

Usage	Use the Personalize Calendar Options page to specify the Lotus Notes or Exchange IDs and passwords so that the portal displays events on the Calendar Events pagelet.
Object Name	EO_PE_CAL_PREF
Navigation	Click the Customize button (pencil icon) in the Calendar Events pagelet title bar.



Personalize Calendar Options page

Account Type This is the organization's primary calendar system, as set up by the portal administrator.

UserID Enter the User ID that corresponds to the **Account Type.**

Note. This information may already appear if the Email pagelet has been set up. Both pagelets use the same user ID and password.

Password Enter the password.

Note. For Lotus Notes, use the internet password. This is the password stored in the Person document in the Lotus Name and Address Book on the Domino server.

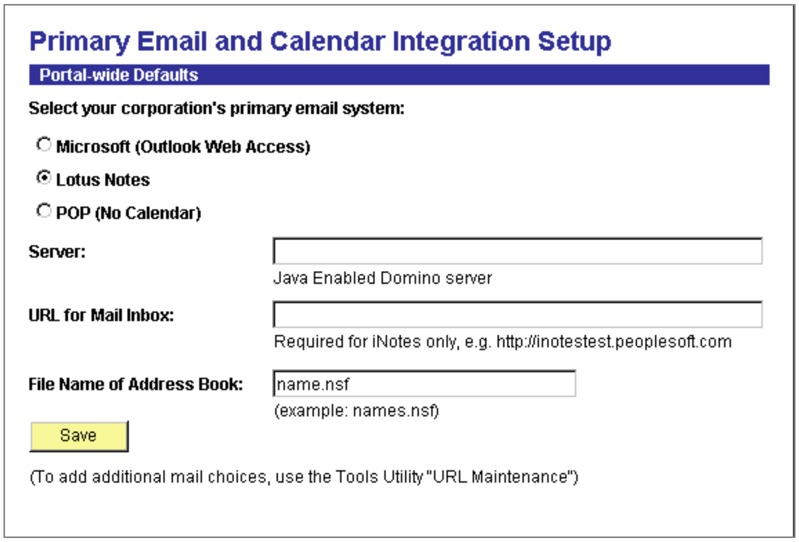
Assigning the Mail Servers

The administrative information that you assign drives both the Email and Calendar Events pagelets. The portal supports Lotus Notes/Domino, Microsoft Outlook Web Access/Exchange, and various POP3 systems for email, and Lotus and Microsoft for calendars. Remember that only one email and calendar system is designated as the portal's default system. The default system is considered primary and will be the first email section on an employee’s pagelet. It is possible, however, to override the system default for an individual employee.

For the pagelets to be fully functional, there are additional setup procedures for the application and mail servers. For more information and detailed instructions, see Configuring Application and Mail Servers.

Primary Email and Calendar Integration Setup Page

Usage	Use the Primary Email and Calendar Integration Setup page to designate the primary email and calendar system for the portal.
Object Name	EO_PE_ADMIN
Navigation	**Home, Menu, Portal Administration, Pagelet Administration, Email and Calendar, Primary Domain Setup**
Prerequisites	None



Primary Email and Calendar Integration Setup page

Microsoft (Outlook Web Access)

Select the default email/calendar system for the portal.

Lotus Notes (Client based or iNotes)

POP (No Calendar)

Server

Enter the server name.

For Microsoft, this field is not required.

For Lotus Notes, enter the name of a Domino server on the network. Typically, this is a centralized hub server. This is the Domino server enabled with additional services and has the custom view PS_PORTAL_MAIL_LOCATION in the Name and Address Book.

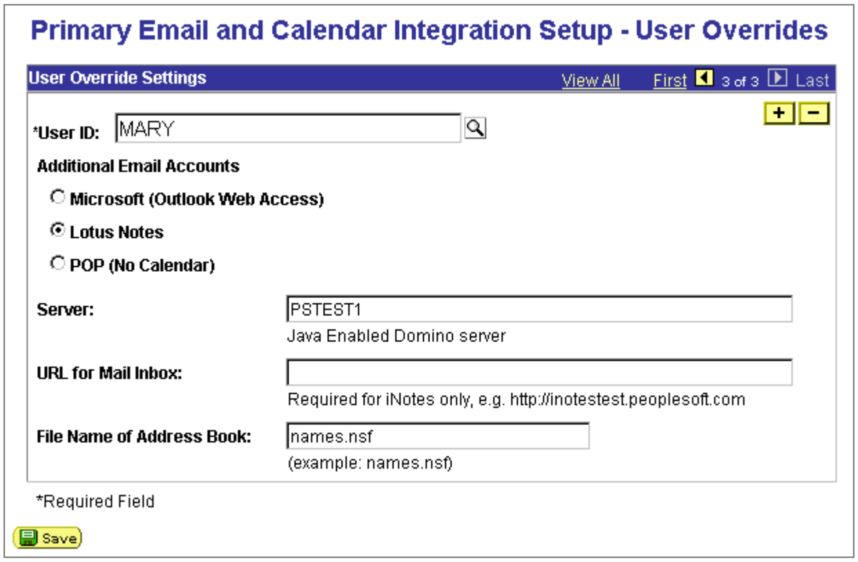
For more information, see Integrating with Lotus Notes Email and Calendar.

For POP mail, enter the POP mail server name. For example, for Yahoo!, enter ***pop.mail.yahoo.com.***

URL for Mail Inbox	Enter a URL. The link on the pagelet transfers the employee to this location in a new browser window. For Microsoft, enter the URL typically used for Outlook Web Access/Exchange Server URL. The URL should have the form: http://<server>/exchange, replacing <server> with the Exchange server name. Use the folder name "exchange." The "exchange" name is the mapped folder name in the IIS installation. It maps to the physical folder in which Exchange is installed. Always use "exchange" as the folder name in the **URL for Mail Inbox** field. For Lotus, this field is only relevant for web-enabled iNotes mail. For POP mail, enter the mail server URL.
File Name of Address Book (Lotus Notes only)	Enter the file name for the Lotus Notes name and address book.

Primary Email and Calendar Integration Setup - User Overrides page

Usage	Use the Email and Calendar Integration Administration Setup - User Overrides page to add overriding email and calendar settings for an individual user ID. This page resembles the primary integration setup page, except that entries on this page are not required to use the pagelets. However, if there are entries on this page, they override the primary system integration entries.
Object Name	EO_PE_ADMIN_OPR
Navigation	**Home, Menu, Portal Administration, Pagelet Administration, Email and Calendar, Domain Setup by UserID**
Prerequisites	The user ID must be previously set up in the PeopleTools/Maintain Security/Use/User Profiles menu.
Access Requirements	From the Find an Existing Value page, select an existing user ID or click Add to add a new record.



Primary Email and Calendar Integration Setup - User Overrides page

User ID	Enter the user ID or click  to look it up.
Microsoft (Outlook Web Access)	Select the email/calendar system for the organization.
Lotus Notes	
POP (No Calendar)	
Server	Enter the server name.

For Microsoft, this field is not required.

For Lotus Notes, enter the name of a Domino server on the network. Typically, this is a centralized hub server. This is the Domino server enabled with additional services and that has the custom view PS_PORTAL_MAIL_LOCATION in the Name and Address Book.

For more information, see Integrating with Lotus Notes Email and Calendar.

For POP mail, enter the POP mail server name. For example, for Yahoo!, enter ***pop.mail.yahoo.com.***

URL for Mail Inbox

Enter a URL. The link on the pagelet transfers the employee to this location in a new browser window.

For Microsoft, enter the URL typically used for Outlook Web Access/Exchange Server URL. The URL should have the form, http://<server>/exchange, replacing <server> with the Exchange server name. Use the folder name "exchange." The "exchange" name is the mapped folder name in the IIS installation. It maps to the physical folder in which Exchange is installed. Always use "exchange" as the folder name in the **URL for Mail Inbox** field.

For Lotus, this field is only relevant for web-enabled iNotes mail.

For POP mail, enter the mail server URL.

File Name of Address Book

(Lotus Notes only)

Enter the file name for the Lotus Notes name and address book.

Setting Up Additional Mail Systems

The administrator must set up *two separate entries* for each POP mail system in order to allow employees to add external POP email accounts to their Email pagelets. Once these entries are stored in the URL Catalog, the choice appears in the Server and URL drop down list boxes of the pagelet's Personalize Email Options/Add an Email Account page.

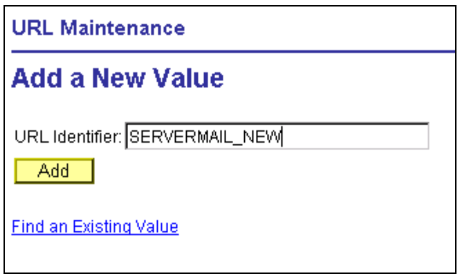
The POP mail system must have POP forwarding on an employee's individual profile. Each employee needs to set this with the external mail system. Some mail systems automatically activate POP forwarding, some require the employee to change a profile setting, while others, such as Microsoft HotMail, do not allow forwarding. Non-forwarding mail systems do not appear on the Email pagelet.

URL Identifier	Description
MAIL_EMATIC	Ematic Mail URL
MAIL_YAHOO	Yahoo Mail URL
SERVERMAIL_EMATIC	Ematic Mail Server
SERVERMAIL_YAHOO	Yahoo Mail Server

URL identifier list

Adding URLs

Usage	Use the URL Maintenance page to add a URL identifier for a POP mail server. This definition enables the choice on the Email pagelet Personalize Email Options/Add an Email Account page.
Object Name	URL_TABLE
Navigation	**PeopleTools, Utilities, Use, URL Maintenance**



URL Maintenance - Add a New Value page

URL Identifier Enter a new URL identifier. The identifier *must* start with SERVERMAIL_, and whatever follows it must be unique.

Add Click the **Add** button to create the URL identifier.

Maintaining URLs

URL Maintenance page

Description Employees see whatever is entered in this **Description** in the Mail Account Server drop down list box when they add an email account. For example: Yahoo Mail Server, Yahoo Mail URL. The employee then enters the actual value in the URL for Mail Inbox field. For example: pop.mail.yahoo.com, www.yahoo.com.

PeopleSoft Internet App Server	Leave this box clear.
URL	The URL to the POP mail's URL identifier. This entry *must* start with MAIL_, and whatever follows it must be unique. For example: MAIL_YAHOO
Comments	If desired, enter comments. For example, your name and the date when the URL was enabled for the Email pagelet.

Configuring Application and Mail Servers

In accordance with the primary email and calendar system selected for the Email and Calendar Events pagelets, system administrators must configure servers with special settings, files, and/or views. It may also be necessary to configure the servers for any additional POP mail systems defined in Setting Up Additional Mail Systems.

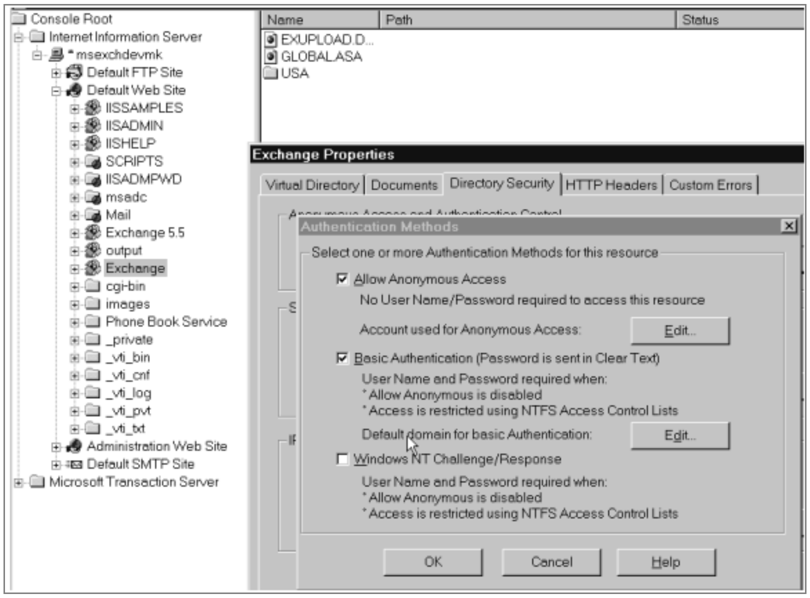
Integrating with Microsoft Outlook Web Access Email and Calendar

The Email pagelet in the portal homepage can display email from Microsoft Outlook Web Access when it is designated as the primary mail system. This requires a specific configuration of the Exchange server.

To set up the Microsoft Exchange server for Email pagelet access:

1. The Windows NT with Primary Domain Controller must be set up on the server. (Refer to Microsoft documentation.)
2. The Microsoft Exchange server (version 5.5 only) and Outlook Web Access must be installed. (Refer to Microsoft documentation.)
3. Set up the Security for the IIS as illustrated in the screen shot that follows.

The displayed Exchange folder is the mapped directory and not the physical directory.



Directory security for the Internet Information Server (IIS)

4. Select Allow Anonymous Access and Basic Authentication, then click OK.

Although **Allow Anonymous Access** and **Basic Authentication** are selected, Peoplesoft ensures at all times that a valid user name and the confidential password are required to access email.

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5. Set up Valid Recipients using the Exchange Server Administrator.

   Each recipient ties up to a Primary Windows NT Account for that user. The Primary Windows NT Account is set up using the User Manager. This Windows NT Account has a user name and a password that is used to access a mailbox in Outlook Web Access.

To place the PeopleSoft supplied integration-enabling .asp files into the default Exchange folder:

1. Locate the default Exchange folder.

   Normally this would be the folder WEBDATA\USA in the Exchange folder. The Exchange folder is where Exchange has been installed. For example, Microsoft Exchange could be installed in a folder called “exchsrvr”. For this scenario, the default Exchange folder would be the directory x:\exchsrvr\Webdata\Usa.

   To determine if the folder is the correct one, ensure that the default Exchange folder contains the following files.

   - logon.asp
   - logoff.asp

2. Copy the following files from <PS_HOME>\scripts into the default Exchange folder:

- Psmsinbox.asp
- Logonfrmps.asp

Integrating with Lotus Notes Email and Calendar

The Email pagelet in the portal homepage can display email from Lotus Notes client or iNotes when Lotus is designated as the primary mail system. This requires a specific configuration of the portal application server and a hub Domino server.

How the Integration Works

The PeopleSoft portal integrates with Lotus Notes mail files to retrieve an individual's new mail and calendar appointment lists. To retrieve this information from each employee's mail file, the PeopleSoft portal uses Java Data Base Connectivity (JDBC), which renders a Notes database as if it were a relational database of tables, rows, and columns.

For the JDBC solution to work, Lotus Notes client/server software must be loaded on the same machine as the Java class that runs the PeopleSoft portal integration, usually the portal application server. The Lotus Notes client application must be running and logged in with a particular ID file (Super ID). This setup is required because JDBC needs several .dll files (which are installed with that Notes client on that machine) and because the JDBC solution must respect the security of Lotus Notes. For JDBC to actually retrieve mail data, the application server must be logged in with a Notes Super ID that has access to each employee's mail data. Otherwise, employees could bypass security measures to gain access to restricted Notes databases.

If you have a Unix application server installed, you must configure a Lotus Notes client/server system to run a process that will listen for Email pagelet requests from the portal's Unix application server. There must be a predefined network port identified in a configuration file that resides on both servers. The request from the portal application server will be processed by the Lotus Notes client/server system and it will send back the appropriate information.

Important Prerequisites

There are different configuration instructions for NT and Unix portal application servers. The principles are the same, however an additional process runs on the Notes Super ID client/server machine for Unix. The following prerequisites must be in place:

- All mail files at an organization must refresh from a single mail file template, or there is some other easy way for a Notes administrator to add two hidden custom views to each user's mail file.
- There is a single Domino server that can run both the HTTP and DIIOP tasks for access by the portal. This server should use Java security. This server has the corporate Name and Address book on it.

- All employees at the organization have an Internet password stored in their Person document in the Lotus Name and Address Book on the Domino hub server. A custom view added to the address book provides the location and file name of each employee's mailbox.
- There is a single user ID or a group (Super ID), which has reader access to each employee's mail file. For JDBC to retrieve mail and calendar information from each user's mail file, it must use an ID that has reader access. For most organizations, this is an administrator ID that has manager access control list (ACL) access to each mail file.

NT Application Server

When the primary mail system is Lotus, and the Lotus Super ID client runs on the same server as the portal application server, complete the steps outlined in the following sections to integrate the Lotus Notes email and calendar functions.

These steps are *separated by role* (portal installer or Notes administrator) and include downloading freeware from Lotus® web sites, then placing the .jar files in the directory <PS_HOME>\class of the NT portal application server.

Extracting .jar and .dll Files

When you transfer .jar files, make sure to use binary transfers and not ASCII transfers. Also, the required Java files must be installed in the proper directory for each portal application server.

Role: Portal Installer

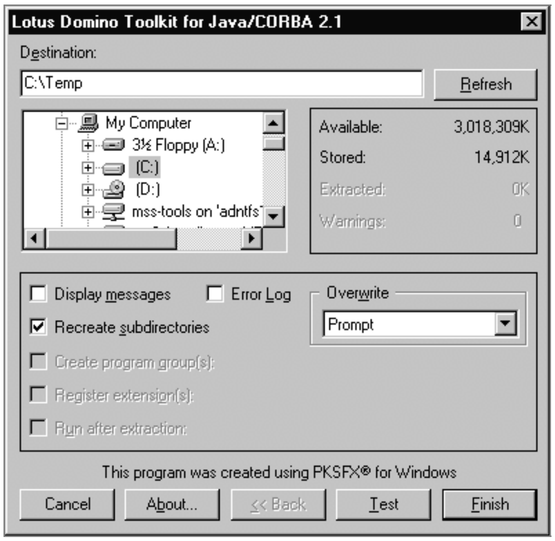
To download NCSO.jar and Notes.jar (Lotus® Domino Toolkit for Java/CORBA):

1. From the browser, enter the following web site address: http://www.lotus.com/.
2. In the search menu, click Developers.
3. In the search menu, click Technologies & Products.
4. On the right side of the screen, click the Tools and Toolkits arrow to display a selection list.
5. In the selection list, click Domino Toolkit for Java/CORBA.
6. Click Download it now!.
7. Select Lotus Domino Toolkit for Java/CORBA Release 2.1 for PC Platforms.
8. Read the agreement, then click I Accept the Terms of this Agreement.
9. Click Download Domino Toolkit for Java/CORBA Release 2.1.

10. With the Save this program to disk check box selected, click OK. Note the destination folder where it is saved.

11. Run ldtj21.exe from the destination, and enter a new destination folder where the .jar files will be extracted. (Example: C:\Temp).

    A subdirectory DTJava is created.



Lotus Domino Toolkit for Java/CORBA 2.1

12. Select the destination folder that you entered in the previous step. From there, navigate to DTJava\Lib.

13. Copy NCSO.jar and Notes.jar to PS_HOME\class on all portal application servers.

14. Delete the DTJava subdirectory.

To download JdbcDomino.jar (Domino Driver for JDBC™):

1. From the Internet browser, enter this website address: http://www.lotus.com/.

2. In the search menu, click Developers.

3. In the search menu, click Technologies & Products.

4. On the right side of the screen, click the Tools and Toolkits arrow to display a selection list.

5. In the selection list, click Domino Driver for JDBC.

6. Click Download.

7. Click Lotus Domino Driver for JDBC 1.1 for Windows 32-bit.

8. Read the agreement, then click I Accept the Terms of this Agreement.

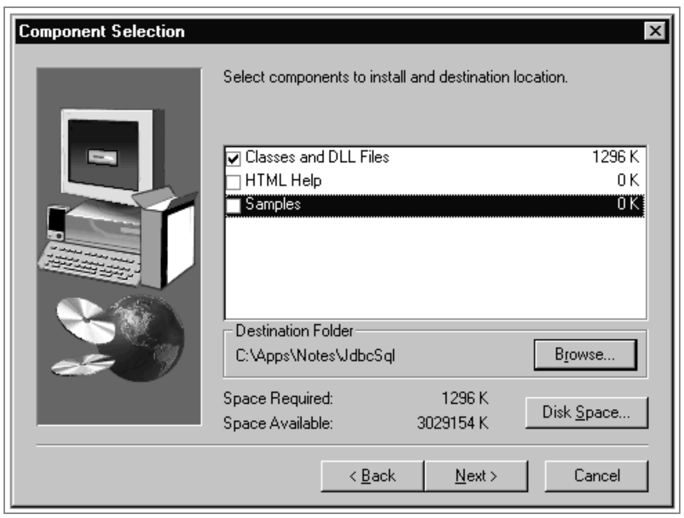
9. Click Download the Domino Driver for JDBC 1.1 for Windows 32-bit.

10. With the Save this program to disk check box selected, click OK. Note the destination folder where it is saved.

11. Run lddj11.exe from the destination, and enter a new destination folder where the jar files will be extracted. (Example: C:\Temp).

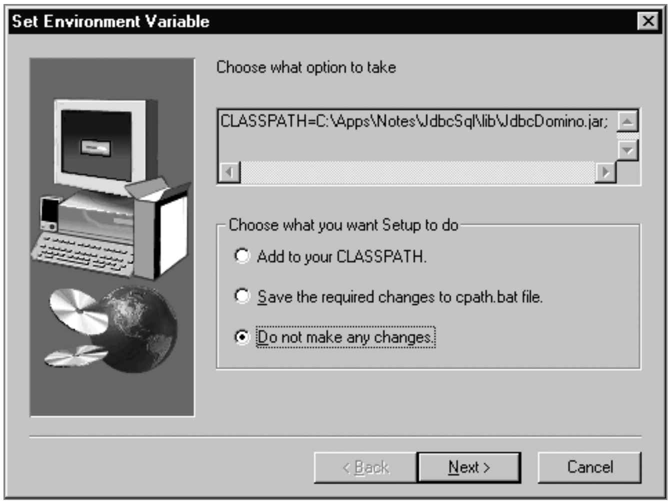
    The Classes and .dll files are the only components that you need to install. You can clear the HTML Help and Samples check boxes. Make sure to note the destination folder that you select here. The default is C:\Apps\Notes\JdbcSql.

    A subdirectory jdbcSql is created.



Component selection

You do not need to make any changes to the environment variables.



Set environment variable

12. Navigate to the destination folder that you selected in the previous step. Then navigate to the JdbcSql\Lib subdirectory.

13. Move the JdbcDomino.jar file to PS_HOME\class on all portal application servers.

14. Move the following files to winnt\system32 on all portal application servers:

    - JdbcDomino.dll
    - JdbcDriver.dll
    - JdbcRniDomino.dll

15. Delete the JdbcSql directory.

Summary of Extracted Files on the Portal Application Server

The following Lotus .jar files reside in the PS_HOME\class directory:

- JdbcDomino.jar
- NCSO.jar
- Notes.jar

The following Lotus .dll files reside in the winnt\system32 directory:

- JdbcDomino.dll
- JdbcDriver.dll
- JdbcRniDomino.dll

Placing Custom Views in Lotus Templates and Creating a Super ID

To place custom views in Lotus templates and create the Super ID:

1. The portal installer sends the Portal_Lotus_Views.nsf file to the Notes administrator. These are provided on the PeopleSoft Portal CD and can be found in PS_HOME in the scripts folder.

   Role: Notes Administrator

2. Open the Portal_Lotus_Views.nsf file in the Lotus/Domino R5 Designer client.

3. Copy the two views, PS_PORTAL_MAIL and PS_PORTAL_CALENDAR, into the mail file template used for all mail files in the organization.

4. Copy the view PS_PORTAL_MAIL_LOCATION either into the Name and Address Book template in the organization (if one is used) or directly into the Name and Address Book of the hub Domino server which the portal application server will be accessing to retrieve employee mail file information.

   a. If the organization uses customized Domino user names that are not any of the entries listed in the User Name field of the Person document in the Name and Address Book, then customize the PS_PORTAL_MAIL_LOCATION view that you just copied.

   b. To customize this view, open it in R5 designer and change the first column of the view to reflect the customized Domino user names used in the organization. For example, if the entries in the User Name field are John Smith/ACME Corp and John Smith, but a custom Domino user name of jsmith is used, the column formula would be @Left(FirstName;1)+LastName.

   c. Change the first column of the PS_PORTAL_MAIL_LOCATION view only if the system uses custom Domino user names that are not any of the entries in the User Name field.

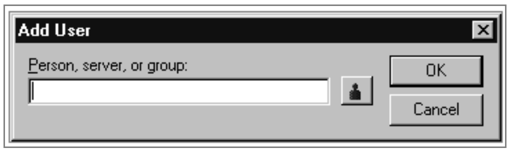
5. Create a Lotus Notes ID that the portal will use as a Super ID for accessing all mail files. Add this ID into the LocalDomainServers group in the Name and Address Book, or into whichever group has access to each employee's mail file on all servers.

   The JDBC code that supports pagelet email message listing requires that LocalDomainServers have manager access to each employee's mail file.

   By default, the Domino directory contains two groups: LocalDomainServers and OtherDomainServers. The LocalDomainServers group includes all servers in the current domain. Domino automatically adds servers that are registered in the current domain to the LocalDomainServers group. Each group must have an owner, who is usually an administrator. The ID file, which each company creates to administer servers, can be added to this LocalDomainServers group, and therefore it is likely to have all the necessary access privileges to each mail file.

   Either this ID file (if it is listed individually in the ACL) or the group (if the group containing this ID file is listed) *must* be selected from the Address Book when it is entered into the ACL (versus typing it in directly). This is necessary because in Lotus Notes, users do not have access to a database if their names are not entered into the ACL by selecting from the address book (versus typing in or copying in).

To select the address book, the entry has to be selected by clicking  in the Add User dialog box, as shown here:



Add user

6. Allow for the overnight design refresh task to update the design of each employee's mail file.

Running the Lotus Mail Client on the NT Application Server

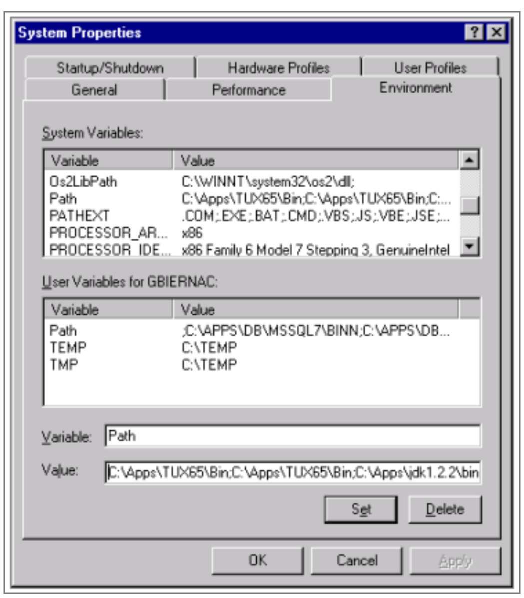
Role: Portal Installer

To run the Lotus mail client on the NT application server:

1. Install the Lotus Notes client software on the portal application server.

   The Super ID .id file is required for the installation.

2. Add to the system variable path the directory path where the Lotus Notes Super ID file exists. Example: c:\apps\notes\data.



System Properties

3. Launch the Lotus Notes client on the portal application server and log in with the Super ID.
4. Check the Lotus Notes Super ID to make sure that the check box called Don't prompt for a password from other Notes-based programs is selected.

   This is *critical* for the portal application to be able to use Lotus Notes in the back end without reprompting for a Lotus Notes login each time.

Checking the Lotus Notes Super ID

5. Complete these steps to confirm that this password check box is selected:
   a. Select File, Tools, User ID from the Lotus Notes menu bar.
   b. When prompted, enter the password for the Super ID file.
   c. Select the Don't prompt for a password from other Notes-based programs check box located on the Basic Information tab.

Unix Application Server

The following section explains how to configure your system to integrate with Lotus Notes email and calendar features when you use a Unix application server.

Preparing the Domino Hub Server for Portal Application Server Access

Role: Notes Administrator

To prepare the Domino hub server for portal application server access:

1. Enable the HTTP task and the DIIOP task on the Domino hub server that will be accessed by the portal application server to check user mail file location information.

Preparing the NT Notes Client System to Receive Unix App Server Requests

Role: Portal Installer

To prepare the NT Notes client system to receive Unix App server requests:

1. Install Java Virtual Machine on the Notes client machine. (See your Microsoft documentation.)

2. Add the directory JLotusServer.
3. Add this directory to the CLASSPATH system variable.
4. Copy the following files to the JLotusServer directory. These files can be found in the class subdirectory of any PS_HOME directory:
   - com.peoplesoft.portsol.pa.jar
   - JLotusServer.class
   - JLotusServer.config
5. Open up the JLotusServer.config file with a text editor.
6. Change the JLotusServerPort value to the appropriate port number.

   Make sure that the same port number is identified in the JMail.config file on the Unix application server.
7. Start JLotusServer by running C:\JLotusServer\java JLotusServer at the DOS command prompt.

Role: Portal Installer

Extracting .jar and .dll Files to the Notes Client System

To extract jar and dll files to the Notes client system:

1. Download freeware from Lotus® web sites.
2. After the download, extract the .jar files and place them in the directory <JAVA>\class of the NT Notes client.

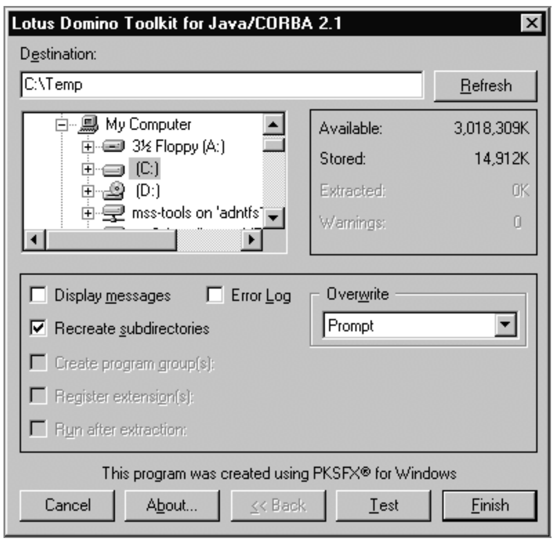
When you transfer .jar files, make sure to use binary transfers and not ASCII transfers.

To download NCSO.jar and Notes.jar (Lotus® Domino Toolkit for Java/CORBA):

1. From the browser, enter the following website address: http://www.lotus.com/.
2. In the search menu, click Developers.
3. In the search menu, click Technologies & Products.
4. On the right side of the screen, click the Tools and Toolkits arrow to display a selection list.
5. In the selection list, click Domino Toolkit for Java/CORBA.
6. Click Download it now!.

7. Select Lotus Domino Toolkit for Java/CORBA Release 2.1 for PC Platforms.
8. Read the agreement, then click I Accept the Terms of this Agreement.
9. Click Download Domino Toolkit for Java/CORBA Release 2.1.
10. With the Save this program to disk check box selected, click OK. Note the destination folder where it is saved.
11. Run ldtj21.exe from the destination, entering a new destination folder where the jar files will be extracted. (Example: C:\Temp).

    A subdirectory DTJava is created.



Lotus Domino Toolkit for Java/CORBA 2.1

12. Select the destination folder that you entered in the previous step. From there, navigate to DTJava\Lib.
13. Copy NCSO.jar and Notes.jar to <JAVA>\class on the NT Lotus Notes client.
14. Delete the DTJava subdirectory.

To download JdbcDomino.jar (Domino Driver for JDBC™):

1. From the Internet browser, enter this website address: http://www.lotus.com/.
2. In the search menu, click Developers.
3. In the search menu, click Technologies & Products.
4. On the right side of the screen, click the Tools and Toolkits arrow to display a selection list.
5. In the selection list, click Domino Driver for JDBC.

6. Click Download.

7. Click Lotus Domino Driver for JDBC 1.1 for Windows 32-bit.

8. Read the agreement, then click I Accept the Terms of this Agreement.

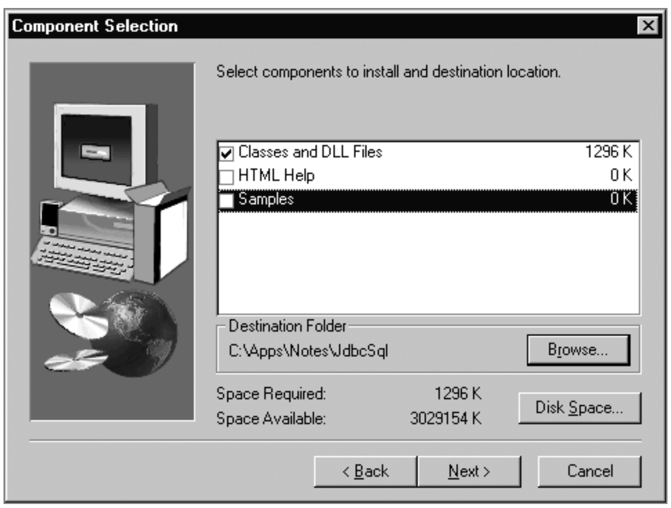
9. Click Download the Domino Driver for JDBC 1.1 for Windows 32-bit.

10. With the Save this program to disk selected check box selected, click OK. Note the destination folder where it is saved.

11. Run lddj11.exe from the destination, entering a new destination folder where the jar files will be extracted. (Example: C:\Temp).

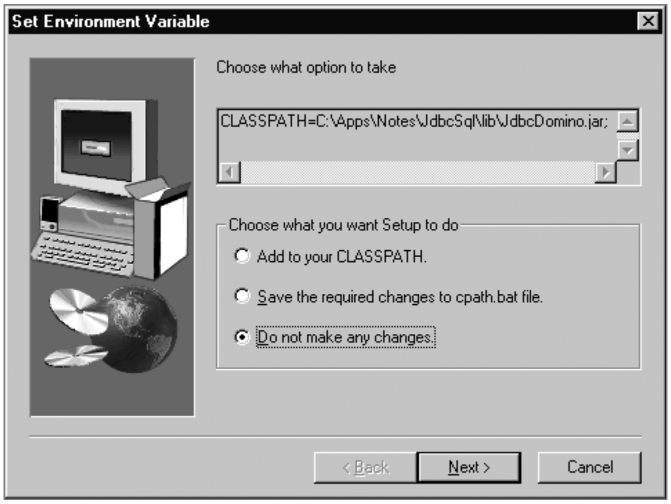
    The Classes and .dll files are the only components that need to be installed. You can clear the HTML Help and Samples check boxes. Make sure to note the destination folder that you select here. The default is C:\Apps\Notes\JdbcSql.

    A subdirectory jdbcSql is created.



Component selection

You do not need to make any changes to the environment variables.



Set Environment Variable

12. Navigate to the destination folder that you selected in the previous step. Then navigate to JdbcSql\Lib subdirectory.

13. Move the JdbcDomino.jar file to the <JAVA>\class directory on the NT Lotus Notes client.

14. Move the following files to winnt\system32 on the NT Lotus Notes client:

    - JdbcDomino.dll
    - JdbcDriver.dll
    - JdbcRniDomino.dll

15. Delete the JdbcSql directory.

Summary of Extracted Files on the NT Lotus Notes Client

The following Lotus .jar files reside in the <JAVA>\class directory:

- JdbcDomino.jar
- NCSO.jar
- Notes.jar

The following Lotus .dll files reside in the winnt\system32 directory:

- JdbcDomino.dll
- JdbcDriver.dll
- JdbcRniDomino.dll

Preparing the Unix Application Server to Send Requests to the Lotus System

Role: Portal Installer

To prepare the Unix application server to send requests to the Lotus system:

1. Make sure that the com.peoplesoft.portsol.pa.jar file is in the <PS_HOME> directory.
2. Go to the <PS_HOME>/appser/<Portal DB Name> directory.
3. Open up the JMail.config file with a text editor.

   Set the JLotusServerIP and JLotusServerPort to the corresponding NT Lotus Notes client/server system.

   Make sure that the same port number is identified in the JlotusServer.config file on the NT Lotus Notes client/server system.
4. Set the LocalLotusNotesAccess = NO, if required.

Placing Custom Views in Lotus Templates and Creating a Super ID

To place custom views in Lotus templates and create the Super ID:

1. The portal installer sends the Portal_Lotus_Views.nsf file to the Notes administrator.

   These are provided on the PeopleSoft Portal CD and can be found in PS_HOME in the scripts folder.

   #### Role: Notes Administrator
2. Open the Portal_Lotus_Views.nsf file in the Lotus/Domino R5 Designer client.
3. Copy the two views, PS_PORTAL_MAIL and PS_PORTAL_CALENDAR, into the mail file template used for all mail files in the organization.
4. Copy the view PS_PORTAL_MAIL_LOCATION either into the Name and Address Book template (if one is used) or directly into the Name and Address Book of the hub Domino server which the email pagelet accesses to retrieve user mail file information.

   a. If the organization uses customized Domino user names that are not any of the entries listed in the User Name field of the Person document in the Name and Address Book, then customize the PS_PORTAL_MAIL_LOCATION view that was just copied.

   b. To customize this view, open it in R5 designer and change the first column of the view to reflect the customized Domino user names used in the organization. For example, if the entries in the User Name field are John Smith/ACME Corp and John Smith, but a custom Domino user name of jsmith is used, the column formula would be @Left(FirstName;1)+LastName.

c. Change the first column of the PS_PORTAL_MAIL_LOCATION view only if custom Domino user names are used, which are not any of the entries in the User Name field.

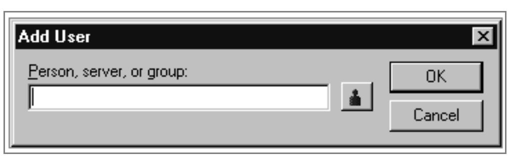
5. Create a Lotus Notes ID which will be used by the portal as a Super ID for accessing all mail files. Add this ID into the LocalDomainServers group in the Name and Address Book, or into whichever group has access to each employee's mail file on all servers.

   The JDBC code that supports pagelet email message listing requires that LocalDomainServers have manager access to each employee's mail file.

   By default, the Domino directory contains two groups: LocalDomainServers and OtherDomainServers. The LocalDomainServers group includes all servers in the current domain. Domino automatically adds servers that are registered in the current domain to the LocalDomainServers group. Each group must have an owner, who is usually an administrator. The ID file, which each organization creates to administer servers, can be added to this LocalDomainServers group, and therefore will have all the necessary access privileges to each mail file.

   Either this ID file (if it is listed individually in the ACL) or the group (if the group containing this ID file is listed) *must* be selected from the Address Book when it is entered into the ACL (versus typing it in directly). This is required because in Lotus Notes, users do not have access to a database if their names are not entered into the ACL by selecting from the address book (versus typing in or copying in).

   To select the address book, the entry has to be selected by clicking  in the Add User dialog box, as shown on this screen shot:



Add User

6. Allow for the overnight design refresh task to update the design of each employee's mail file.

Running the Lotus Mail Client on the NT System

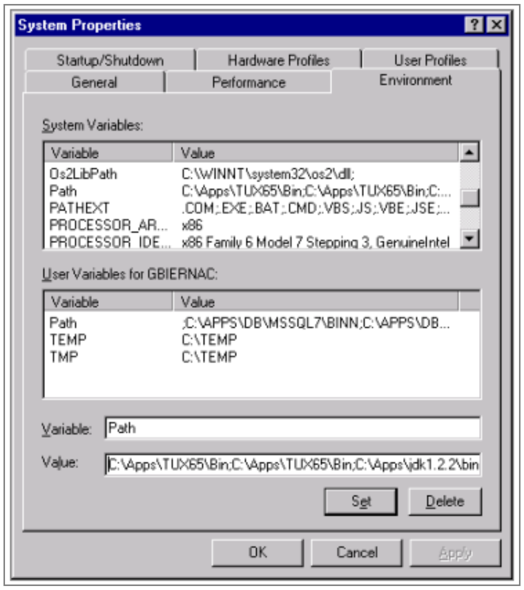
Role: Portal Installer

To run the Lotus mail client on the NT system:

1. Install the Lotus Notes client software on the Lotus Notes client system that will be run with the Super ID.

   The Super ID .id file is required for the installation.

2. On the Notes client machine, add the directory path where the Lotus Notes Super ID file exists to the "Path" system variable. Example: c:\apps\notes\data.



System Properties dialog box

3. Launch the Lotus Notes client on the Lotus Notes client system and log in with the Super ID.

4. Check the Lotus Notes Super ID to make sure that the check box called Don't prompt for a password from other Notes-based programs is selected.

   This is critical for the portal application to be able to use Lotus Notes in the back end without reprompting for a Lotus Notes login each time.

Checking the Lotus Notes Super ID

5. Complete these steps to confirm that this password check box is selected:

   a. Select File, Tools, User ID from the Lotus Notes menu bar.

   b. When prompted, enter the password for the Super ID file.

   c. Select the Don't prompt for a password from other Notes-based programs check box located on the Basic Information tab.

Preparing the Domino Hub Server for Portal Email Pagelet Access

Role: Notes Administrator

To prepare the Domino hub server for portal email pagelet access:

1. Activate the HTTP task and the DIIOP task on the Domino hub server that will be accessed by the email pagelet to check employee mail file location information.

Configuring the Server for POP Mail

The setup for POP mail is optional. It is only required when the portal administrator has designated a primary mail system that is POP-based or has set up additional email selections for the email pagelet. POP mail requires correct placement of third-party .jar files from the Sun website to the portal application server.

Assumptions

The POP mail configuration discussion that follows makes these assumptions:

- If you access POP mail on an *internal* mail server, that mail server must be POP-enabled.
- If you access POP mail from an *external* mail system, the remote POP mail server to which you point must be POP-enabled. In addition, employees must set up their external mail account to POP forward.

Extracting .jar Files for POP Email Integration

These steps are *separated by role* (portal installer or Notes administrator) and include downloading freeware from Sun® web sites, then placing the .jar files in the directory <PS_HOME>\class of the NT portal application server.

When you transfer jar files, make sure to use binary transfers and not ASCII transfers. Also, you must install the required Java files in the proper directory for *each* portal application server.

Role: Portal Installer

To download mail.jar (JavaMail™):

1. From the browser, enter the following website address: http://www.javasoft.com/products/javamail/index.html.
2. Click Continue.

3. Read the license and export agreement, then click ACCEPT.

4. Click FTP download.

5. Extract the mail.jar file into the PS_HOME\class directory on each portal application server.

6. Delete the javamail1_1_3.zip file.

To download activation.jar (JavaBeans™ Activation Framework):

1. From the browser, enter the following website address: http://www.javasoft.com/beans/glasgow/jaf.html.

2. Click Continue.

3. Read the license agreement, then click ACCEPT.

4. Click FTP download.

5. Extract the activation.jar file into the PS_HOME\class directory on each portal application server.

6. Delete the jaf1_0_1.zip file.

To download pop3.jar (Pop3 Provider):

1. From the browser, enter this website address: http://www.javasoft.com/products/javamail/pop3.html.

2. Click Continue.

3. Read the license agreement, then click ACCEPT.

4. Click FTP download.

5. Extract the pop3.jar file into the PS_HOME\class directory on each portal application server.

6. Delete the pop31_1_1.zip file.

Summary of Extracted .jar Files in the <PS_HOME>\class Directory

There are the Sun® .jar files:

- mail.jar
- activation.jar
- pop3.jar

For more information, refer to the chapter Using Portal Administration Features in the *PeopleTools Portal Technology PeopleBook.*

CHAPTER 2

Using Portal Navigation

The navigation menu is a tool for navigating through the portal.

This chapter is intended for the portal administrator. It covers the following topics:

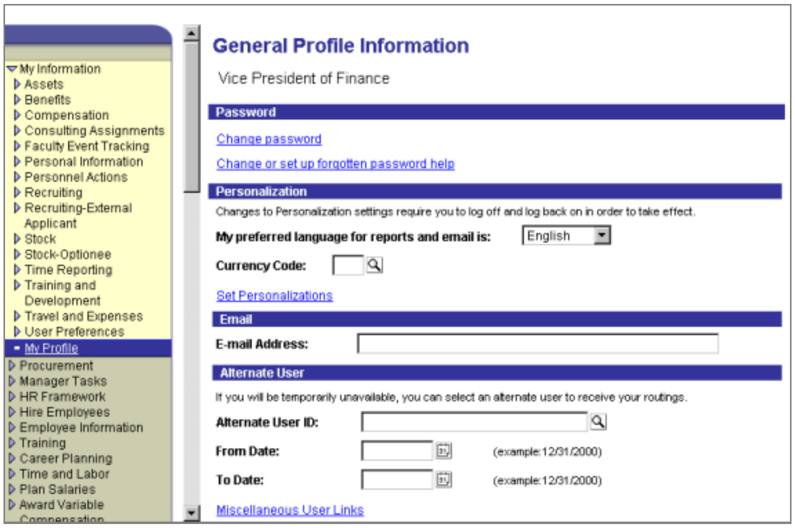
- The two PeopleSoft navigational approaches.
- How to display the navigation start page.
- How to use the navigation menu.
- How to set the navigation parameters.
- How to add the Navigation Menu pagelet to the portal homepage
- How to set content to display the navigation menu.

Overview: Two Navigational Approaches

PeopleSoft Portal Solutions provide two navigational approaches: left-hand navigation and full page navigation.

Left-Hand Navigation

The left-hand navigation option provides a familiar navigational paradigm and enables you to navigate to content while maintaining *navigational context.* In addition, navigating to the next piece of content is only a click away.



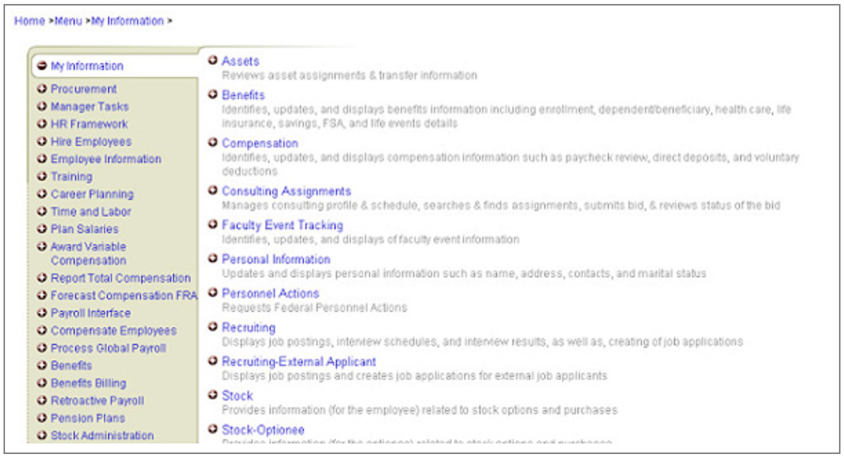
Left-hand navigation

However, the left-hand navigational bar occupies precious horizontal space: it's 192 pixels wide. If many users have their monitors set to a display mode of 800x600, then that leaves only 608 pixels of horizontal space for content before the browser's horizontal scroll bar becomes necessary. Usability experts tend to agree that content requiring horizontal scroll bars annoys users and slows down productivity. In contrast, vertical scroll bars are much more acceptable to the user community.

When you use the left-hand navigation in a 1024x768 mode, you're left with 832 pixels of horizontal space. However, based on various vision impairments and user preferences, research shows that even many expert users with monitors capable of displaying in 1024x768 mode choose the 800x600 display mode. Therefore, PeopleSoft makes the general recommendation that you should plan and build your portal content within 800 pixels of horizontal space.

Full Page Navigation

Full Page Navigation, on the other hand, doesn't take up any of the horizontal space for the destination content. Instead, it builds breadcrumbs that you can use to jump back to the navigational page. However, our experience shows that most users prefer left-hand navigation interaction to full page navigation—as long as horizontal scrolling is not required.



Full page navigation with breadcrumbs

PeopleSoft Portal Solutions are open and fully customizable. As a result, you have the option to create an entirely different navigational approach from the ones provided by PeopleSoft. The portal content registry is completely accessible using application program interfaces (APIs) and will return a pre-filtered navigational hierarchy based on user security.

For more information about portal registry APIs, see Using the Portal Registry API in the *PeopleCode Reference PeopleBook.*

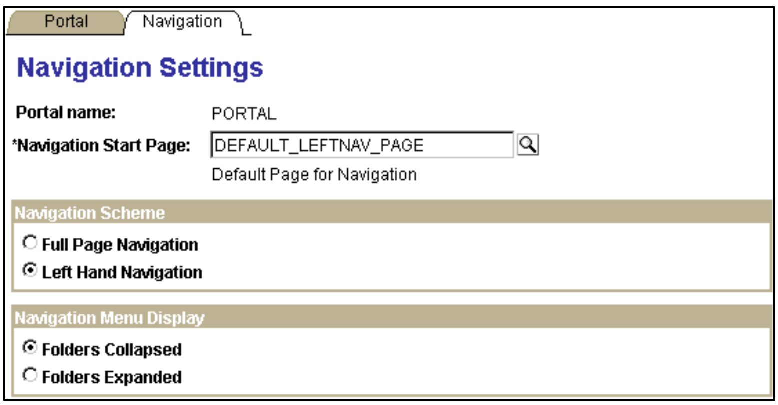
Planning for PeopleSoft Content

PeopleSoft content is typically some of the content that you choose to deploy within your portal. The PeopleSoft development standard for the casual user of self-service transactions takes up 570 pixels. That's well within the 608 pixel limit necessary to deploy left-hand navigation. However, expert users tend to require more content on one page to accomplish their tasks. Therefore, transactions such as Ledger Entry are developed within 760 pixels of width. Many customers may decide to implement only the self-service transactions within their enterprise-wide portal and to leave navigation of the expert user transactions within the source applications. Of course, the biggest return on investment comes from deploying the self-service applications, and PeopleSoft recommends that you first deploy these applications within your portal. To assist you in separating the self-service user from the expert user of PeopleSoft transactions, we created separate Information Architecture projects according to these transaction types.

For more information, refer to the chapter “Understanding Information Architecture”.

Using the Navigation Settings Page

Usage	Use the Navigation Settings page to set the displayed portal navigation. The navigation parameters that you specify determine Portal navigation. These navigation parameters determine: (1) which page is displayed when the Menu link is clicked in the portal header; (2) how the navigation menu displays folders.
Object Name	EO_PE_PREFERENCES
Navigation	(This page is not accessible in two- or three-tier or PIA.) From the portal homepage, click the Menu link in the portal header, then select **Portal Administration, General Settings, Navigation Settings.**
Prerequisites	None
Access Requirements	None



Navigation Settings page

The **Portal name** appears at the top of the page.

Navigation Start Page

The **Navigation Start Page** is the content reference Name of the target page that appears alongside the navigation menu. Click  to select a different content reference. The search results retrieve only the portal registry content references that explicitly state PORTALLEFTNAVIGATION as their template name.

(For more information, see Displaying the Navigation Start Page.)

Navigation Scheme Select **Left Hand Navigation** or **Full Page Navigation.**

This selection determines which page appears when the Menu link is clicked in the portal header. When you select **Left Hand Navigation,** the navigation menu appears on the left side of the page with the **Navigation Start Page** as the target page. With **Full Page Navigation** selected, the full page navigation with breadcrumbs is displayed expanding across the page.

Navigation Menu Display Select **Folders Collapsed** or **Folders Expanded.**

Selecting Folders Collapsed will initially display only the top-level folders and allow you to expand or collapse each subfolder as you click on it. When you select Folders Expanded, the navigation menu always displays all folders open. Only content references can be selected; folders cannot be collapsed.

Adding the Navigation Menu Pagelet to the Homepage

By default, the homepage displays the Menu Pagelet and not the Navigation Menu Pagelet. These two pagelets look very similar on the homepage. The difference lies in what page appears when you click a link: the Navigation Menu pagelet displays the navigation menu on the left side of the page, and it uses the Navigation Start Page as the target page. In contrast, when you click a link on the Menu pagelet, the full page navigation with breadcrumbs expands across the page.

You should make one or the other of these pagelets available to users. You can remove availability of one of the pagelets by adjusting the content reference security for that pagelet.

To access the content references for the Menu and Navigation Menu pagelets from the portal homepage, click Menu in the portal header and then select Portal Administration, Structure and Content, Base Portal Data, Pagelets, PeopleSoft Applications.

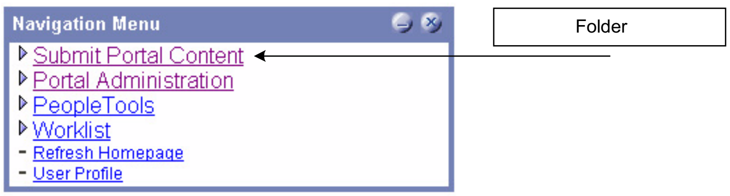
Warning. If you specify the Content Reference Security Access Type as *Permission List* and no Permission Lists have been selected, *every* user is prevented from accessing this content reference anywhere in the portal. The portal administrator must select the *Author Access* check box on the Content Reference Security page. Otherwise, the content references are not accessible even to the administrator. This inaccessibility extends to the Registry Structure and Content pages.

Deciding which pagelet to make available to users should depend upon your choice of default templates on the General Settings page and on the navigation scheme that you selected on the Navigation Settings page.

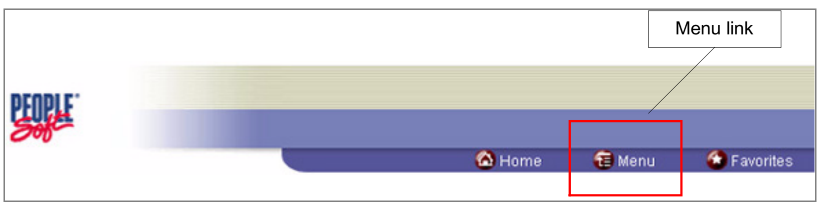
For more information about adding pagelets to the portal's homepage, refer to the chapter Working with Homepages in the *PeopleTools Portal Technology PeopleBook.*

Displaying the Navigation Start Page

To display the Navigation Start page, click any folder on the Navigation Menu pagelet, or click the Menu link in the portal header.

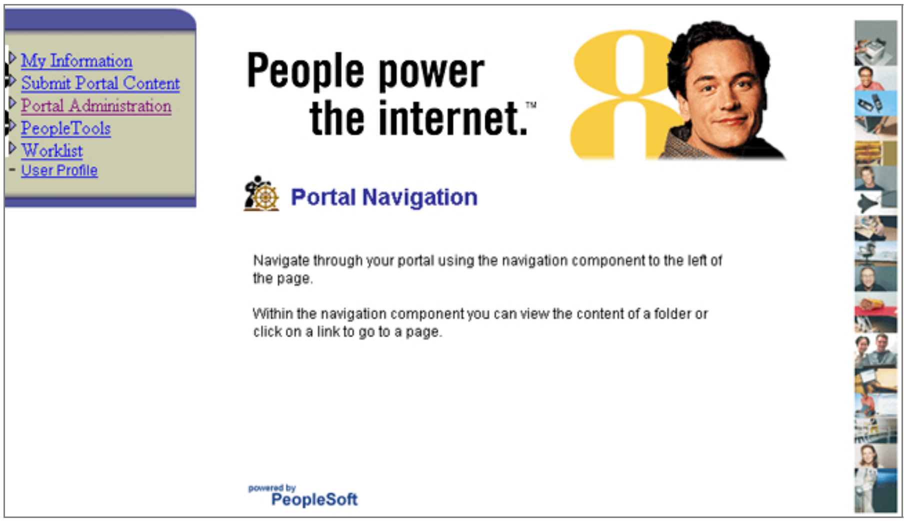


Navigation Menu pagelet with folder links



The portal header with Menu link

The following screen illustration shows the Navigation Start page—the default splash screen delivered with the PeopleSoft portal's left-hand navigation.

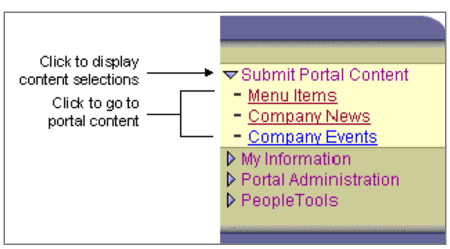


Navigation start page (default splash screen) with navigation menu

The navigation menu appears when you specify left-hand navigation as the navigation scheme on the Navigation Settings page. For more information, refer to Using the Navigation Settings Page.

Using the Left-Hand Navigation

As the following illustration shows, from the left-hand navigation menu you can click a folder arrow to display its contents. You can also click a content reference title to display the content page.



Left-hand navigation menu

Creating Your Own Custom Splash Screen

The Navigation Start page, as shown in the previous screen illustration, is the default splash screen delivered with the PeopleSoft portal. However, you can also create your own custom splash screen. This involves:

- Creating a new Navigation Start page.
- Registering the new page as a content reference in the portal registry with PORTALLEFTNAVIGATION specified as the template.
- Specifying this page as the Navigation Start page.

Creating a new Navigation Start Page

To create a new Navigation Start page:

1. Log on to your PeopleSoft database in two-tier connectivity and launch Application Designer.
2. Create a new page.

   You can clone the delivered splash screen page EO_PE_LFT_DEFAULT, if you are creating the new page in the portal database. The page can reside in any PeopleSoft database to which the Portal has access.

   Customize the page by changing the images, the displayed text, adding hyperlinks, and so forth. Any PeopleSoft PIA page can be used as the Navigation Start page.
3. Create a new component. You can clone the delivered component EO_PE_LFT_DEFAULT. Insert your new page into this new component.
4. Attach the new component to a new menu or to an existing menu. Use the Permission Lists to grant security to the component and menu. (To access the Permission Lists: select PeopleTools, Maintain Security, Permission Lists.)

Registering the New Navigation Start Page

To register the new Navigation Start page:

1. Launch your browser and log on to the portal database.
2. From the Menu pagelet, click Portal Administration.
3. Click Structure and Content.
4. In the Folders section of the Structure and Content page, navigate through the folder hierarchy to select the folder where the new Navigation Start page should reside. (Do not place it in the Base Portal Data folder or its subfolders.)
5. In the Content Reference section of the Content Ref Administration page, click Add Content Reference.
6. Enter a Name and Label for your new Navigation Start page. (Make a note of the name you use for this content reference—you'll be required to select it from a search list.)

7. For Usage Type, select *Target.* The Storage Type will default to *Remote by URL.*
8. For URL Type, select *PeopleSoft Component.*
9. For Template Name, select PORTALLEFTNAVIGATION.

You *must* enter PORTALLEFTNAVIGATION as the Template Name in order for this page to be available for selection as the Navigation Start page.

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10. For Content Provider, select the Content Provider name associated with the PeopleSoft database that contains your new splash page and component.
11. For Menu Name, Market, and Component, enter the menu, market, and component that contain your new Navigation Start page.
12. Select the check box Hide from portal Navigation?
13. Click the Content Reference Security Tab. Select the Access Type of *Public.*
14. Click Save.

    Your new splash screen is now registered and available for selection as the Navigation Start page.

Specifying the Page as the Navigation Start Page

To specify the page as the Navigation Start page:

1. Launch your browser and log on to the portal database.
2. From the Menu or Navigation Menu pagelet, click Portal Administration.
3. Click General Settings.
4. Click the Navigation tab.
5. For Navigation Start page, click . The search results retrieve only those portal registry content references that explicitly state PORTALLEFTNAVIGATION as their Template Name.
6. Select your newly created and registered Navigation Start page. It will be listed as the content reference name specified when you registered the page.
7. Click Save.

For more information about the fields in the General Settings Navigation page, refer to the Using the Navigation Settings Page.

Displaying the Navigation Menu

When displayed in the portal, every target page appears with a template. (If you have selected the No Template check box for a content reference, the target page appears outside the portal.) The template used for any given target page is selected according to a system hierarchy.

The system associates a template with a target page by looking first at the target page's content reference. If this value is blank, the system uses the default template specified for the target page's Content Provider. If the Content Provider's default template is blank, then the system uses the default template specified for the Portal Definition. The default templates for the Content Provider and Portal Definition are set on the Content Provider Administration page. To access this page from the homepage, select Portal Administration, General Settings, Portal.

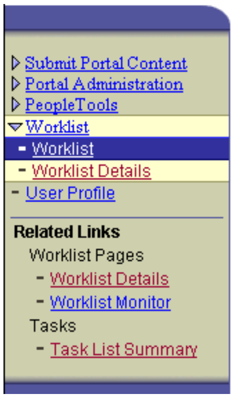
Non-registered pages accessed from a related link appear with the default template of the Portal Definition.

The template that allows for display of the navigation menu is PORTALLEFTNAVIGATION (Portal Left Navigation.) In order for a target page to display the navigation menu, the PORTALLEFTNAVIGATION template must be associated with the target page at the level at which the template is selected by the system.

For example, the Portal Definition for the PeopleSoft Enterprise Portal is delivered with a default template of PORTALLEFTNAVIGATION. The Content Provider "Portal" is delivered with a blank default template. Any registered content references with a Content Provider of "Portal" that do *not* specify a template name will automatically appear with the PORTALLEFTNAVIGATION template. Any registered content references with a Content Provider of "Portal" that *do* specify a Template Name will appear with that specified template.

In addition to displaying the Portal Registry Structure and Content, the PORTALLEFTNAVIGATION template also displays related links for the content reference page.

The following screen illustration shows the left-hand navigation menu with related links:



Sample left-hand navigation menu with related links

For more information about related links, refer to the chapter “Understanding Related Links”.

CHAPTER 3

Understanding Information Architecture

Information architecture refers to the design of organization, labeling, navigation, and indexing systems that support effective browsing and searching within a website. Information architecture plays a central role in determining whether users can easily find the information that they need.

The process of information architecture design begins with research into mission, vision, content, functionality, and intended audiences for the site. This analysis results in the creation of a skeleton for the site and the selection of a metaphor, or rationale, for the site's structure. Finally, site content can be organized into categories and navigation can be mapped.

PeopleSoft spent a significant investment on our pre-packaged and copyrighted information architecture. We sought business process experts and sent them to website information architecture classes. We modeled business process content using roles-based task analysis and typical user profiles. We also worked closely with usability experts to confirm our design approaches as well as the final product. As a result, when you use this pre-built and vendor maintained information architecture, you can be active quickly with PeopleSoft Portal Solutions.

This chapter is intended for anyone who is interested in learning about information architecture. The first section discusses the approach and standards for the information architecture delivered by PeopleSoft Portal Solutions. Subsequent sections describe aspects of information architecture, including navigational features, search architecture, role-based security, and related information links.

Applying Information Architecture to PeopleSoft Portal Solutions

In this section, we look at the activities that were performed to create the information architecture for PeopleSoft Portal Solutions.

To identify the mission and focus of the portal, we determined who would be using the portal, who would be building it, and what would be its strategic goals, business goals, key usability principles, technical constraints, and future needs.

Currently, PeopleSoft has five prepackaged portal solutions:

Employee Portal	An enterprise portal used by employees and the extended workforce within an organization in order to carry out their job responsibilities as well as to access and share information.

Customer Portal	An enterprise portal used by consumer-to-business and business-to-business customers in order to purchase goods and services and to manage accounts.
Supplier Portal	An enterprise portal used by business-to-business partners in order to supply goods and services as well as to manage accounts.
Campus Portal	An enterprise portal used by students, employees, extended workforce, and other stakeholders within a higher education institution in order to perform necessary tasks and functions as well as to access and share information.
Government Portal	An enterprise portal used by employees and the extended workforce within a governmental organization in order to carry out their job responsibilities as well as to access and share information.

Determining the Content and Functionality of the Site

PeopleSoft provides software to support a wide range of business processes. A PeopleSoft Portal can aggregate all PeopleSoft transactional content, non-PeopleSoft transactional content, and unstructured content to support your business processes. Our pre-packaged solutions provide the pre-built information architecture for the PeopleSoft transactional content—the primary focus of this chapter. However, we designed the information architecture so that you can easily weave supporting unstructured content into the hierarchy. You can also replace PeopleSoft transactional content with competing vendor or custom solutions as appropriate for your implementation.

Creating a Skeleton and Determining a Metaphor for the Site

Three types of metaphors are useful site design:

- Organizational metaphors rely on the existing structure of a group, system, or organization.
- Functional metaphors relate tasks that can be done on the site to tasks that can be done in another environment.
- Visual metaphors are based on common graphic elements familiar to most people in a given culture.

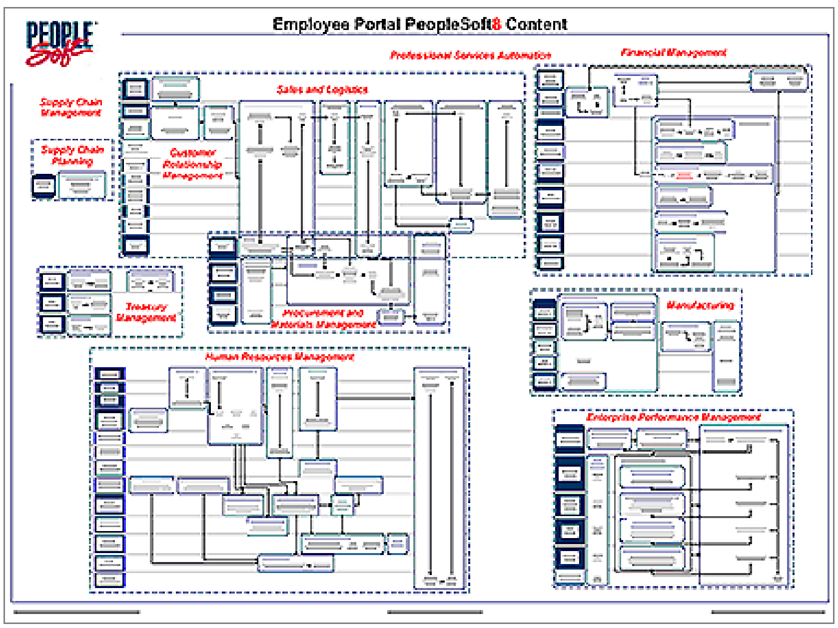
Users of PeopleSoft Portal Solutions carry out tasks or activities within the portal as part of an underlying business process. Although organizational metaphors can work in a business, organizational structures tend to change over time and therefore would require constant updating and re-learning by the user community. Visual metaphors can be appropriate for websites with a small amount of content; however they are not very practical when you are trying to organize thousands of URLs. The functional metaphor is most appropriate for PeopleSoft portals.

A skeleton for the portals emerges when you organize business processes at a local level and by providing other more generic navigational functionality (such as search and favorites) at a global level.

Developing High-Level Conceptual Models of Business Processes

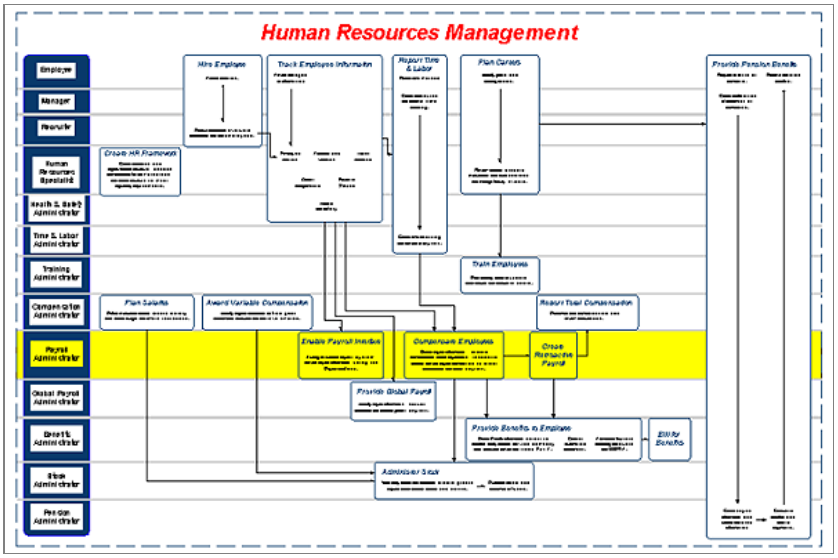
PeopleSoft content consists of over 7,500 components that are each made up of one or more web pages. To begin categorizing this information, we created high-level, enterprise-wide business process models. These models were used to determine the categories for content from which the navigational hierarchy was created. The business process models were also used to determine the business roles that users assume and the security setup required for the portals.

The following graphic offers a bird's-eye view of the world of PeopleSoft business processes—at 30,000 feet, so to speak.



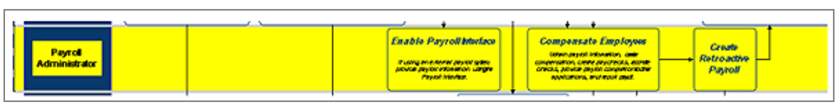
PeopleSoft high-level business process model

The following graphic offers a close-up view of the PeopleSoft high-level business process model. In particular, it shows a selected business process: the world of Human Resources Management, its interrelated processes and life cycles, and the many roles that users assume in this business process.



Human Resources Management business process

Zooming in on a particular role (as shown in the following graphic) lets you see that a Payroll Administrator performs three basic sub-processes: Enable Payroll Interface, Compensate Employees, and Create Retroactive Payroll.



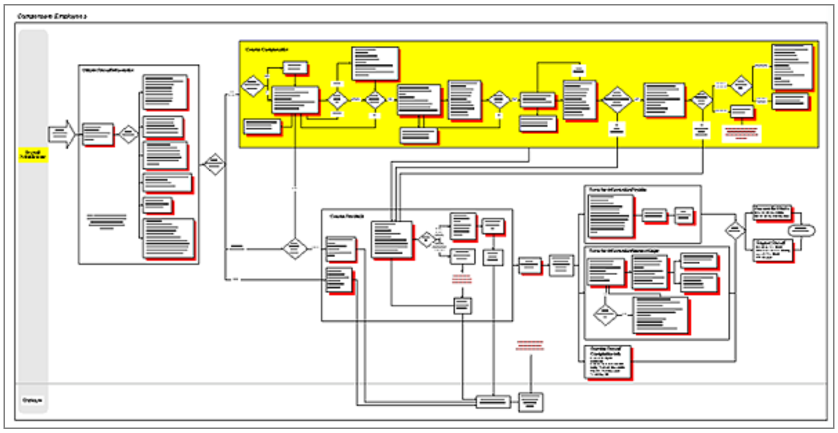
Payroll Administrator role and its sub-processes

In the next section, we discuss how these sub-processes are broken down into additional activities and tasks.

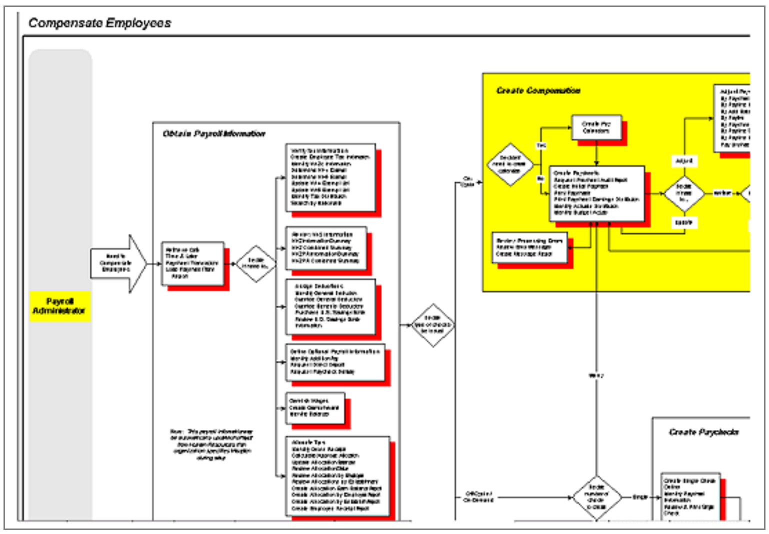
Performing Functional and Task Analysis

We performed functional and task analysis to determine transaction flow and to anticipate user paths.

In the following two diagrams, the Compensate Employees sub-process breaks down into ten activities involving two roles: Payroll Administrator and Employee. Each of these activities breaks down into additional tasks performed by accessing corresponding PeopleSoft application components. Components consist of one or more related web pages that are required to perform a portion of a task.

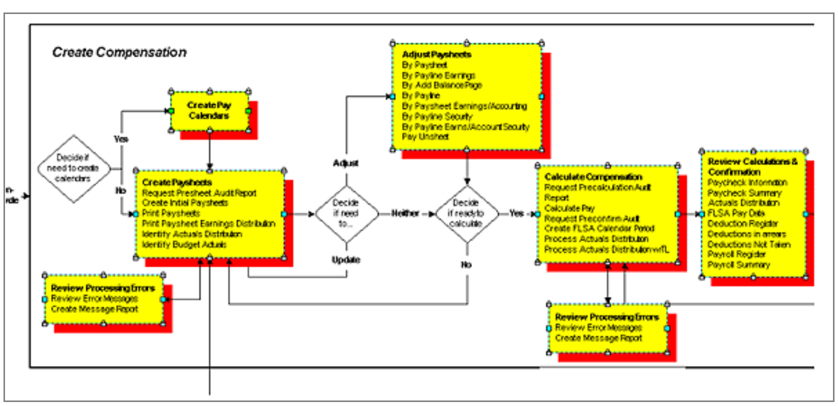


A bird's-eye view of the Compensate Employees sub-process and its two roles



A close-up view of the Compensate Employees sub-process and its additional tasks

In the following diagram, a close-up of the Create Compensation task, we can see the PeopleSoft application components that are accessed to perform a task.



Create Compensation task

We performed this detailed business process and user task analysis for all 7,500 PeopleSoft supporting content. This analysis provided the foundation for our pre-built information architecture.

Constructing an Appropriate Structure and Method of Organizing Information

To create the structure of information, we organized site content into categories and created an interface to support those categories.

The business processes, activities, tasks, and components shown in PeopleSoft business-process models are directly reflected in the portal navigation structure.

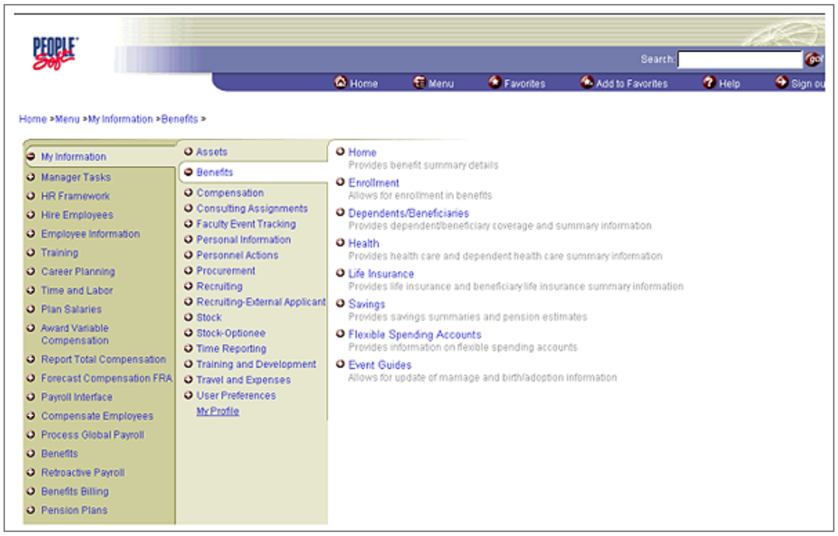
The PeopleSoft portal is delivered with two graphical navigation interfaces, the full page navigation and left hand navigation. In this chapter, we illustrate our information architecture using the full page navigation. For more information about navigational approaches, refer to "Using Portal Navigation".

Mapping the Entire Structure of the Site

To map the entire structure of the site, we organized the position of pages within sections and developed a functional and intuitive plan to get the user from point A to point B using the most efficient path.

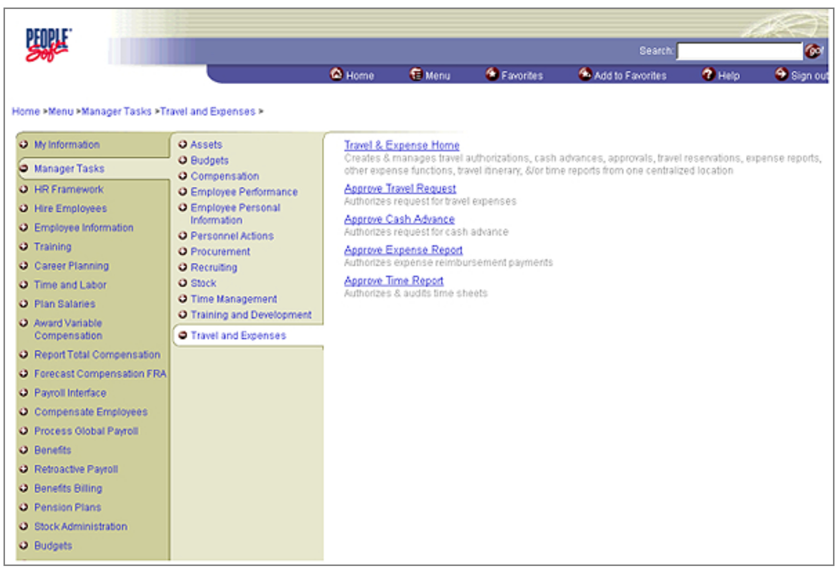
PeopleSoft business applications consist of over 7,500 components. Using the approach outlined in the previous sections on navigation structures, we mapped these components into a navigation structure made up of approximately 65 top-level categories. This may seem like a lot. However, usability studies indicate that users prefer broader to deeper hierarchies. Deep hierarchies require extra clicks and give an illusion of complexity. In addition, these categories are filtered to display appropriate content selections for over 200 roles. We carefully modeled the content that users are likely to have with multiple roles to ensure that a user will likely see less than 20 items within any navigational branch.

In the following screen illustration, the navigation page shows a section of the navigation structure unfiltered by any role. This is the superset that a system administrator might see. The branch of the structure that is unfolded is called "My Information," which includes all employee self-service pages.



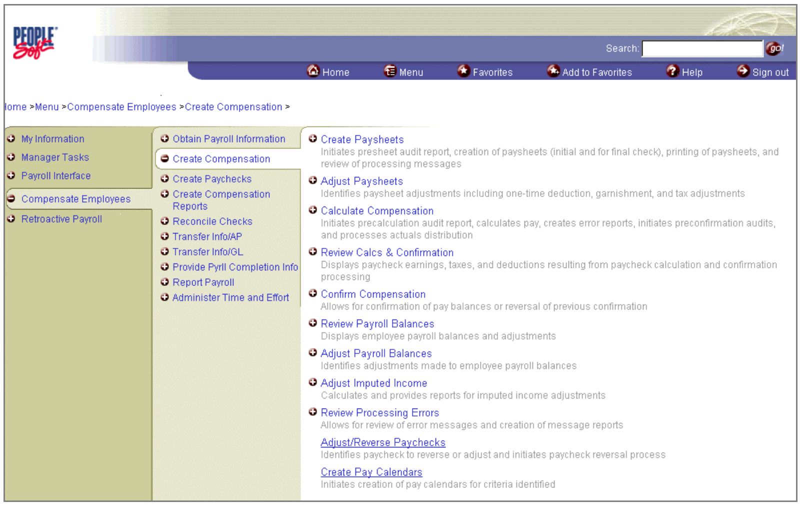
A navigation page unfiltered by role

The following navigation page shows the Manager Tasks branch of the structure, which includes all manager self-service pages.



The navigation page of the Manager Tasks branch

In the following screen illustration, the navigation page shows the navigation structure filtered for the Payroll Administrator role. Included are content selections that are appropriate for a payroll administrator. In addition, the My Information branch includes employee self-service content selections because a payroll administrator also assumes the Employee role.



Navigation page that shows the structure filtered for the Payroll Administrator role

To illustrate the flexibility of our delivered role-based security setup, we have also assigned the role of Manager to this payroll administrator. This role is for a line manager who is responsible for an organizational unit.

Designing the Organization, Labeling, Navigation, and Indexing Systems

To help users find the information that they need, we designed the organization, labeling, navigation, and indexing systems to support both browsing and searching.

User Interface Standards

PeopleSoft's User Experience team helped us to establish user interface standards that we used to create an information architecture that is usable, understandable and compelling. Following are some of our basic tenets and the standards we established:

- Content should be presented to a user with a metaphor they know, expect, and understand. We organized the content in business process or business functional categories because our users perform business-related tasks.
- Users should be presented only with what they need to accomplish their objective. We organized the content based on the user's role, and we present it so that any given role will immediately see only those categories of content that they need to use in performing their tasks.
- A broader hierarchy is more effective than a deeper one. We organized the content so that any given role will immediately see the categories of content that they need to use in performing their job. Moreover, we limited the navigational hierarchy to no more than three levels.
- Short titles with key words are more effective than long titles. We limited our titles to no more than thirty characters, and we use verbs only where necessary to distinguish between categories of content.

- Terminology should be clear and succinct. When verbs are used, they are action verbs that direct a user through a path to perform a particular task.

- Instructional text should be provided to guide a user through complex material. We provide short, succinct descriptions for each piece of content in the portal. The voice used in these descriptions operates conversationally, helping to guide users and to tell them what the content is used for. It is user- and business-oriented—not technical documentation.

- A user should be provided with multiple ways of navigating through large, complex websites. In addition to a menu structure, we provide a full function search capability. Where useful, we also provide related links to similar or related content that a user may want to access while performing a given task.

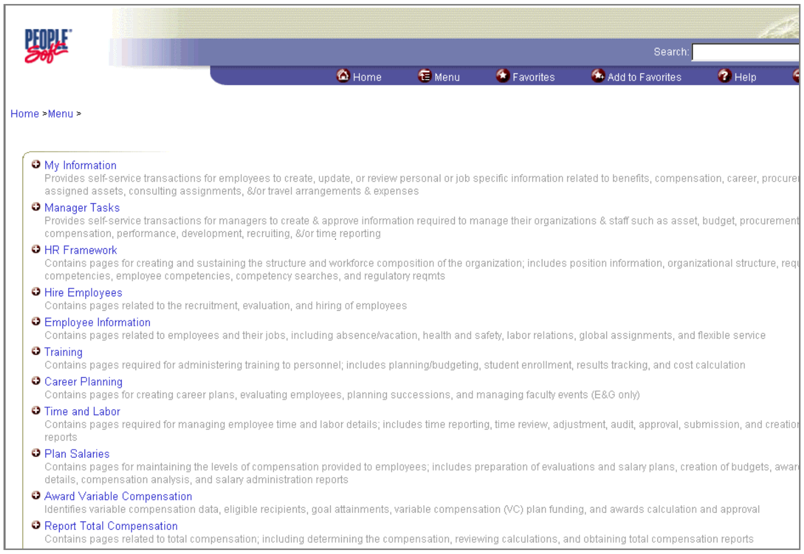
Organization

Organization of content is by business process or business function. We carefully created the information architecture by modeling what content is necessary to perform a given business process. We then defined the business roles involved in performing those business processes and filtered the content based on the user's assigned roles. A listing of the defined roles is included in Role-Based Security.

Labeling

The way that folders and pages are labeled generally reflects the business process performed. Where it is necessary to indicate the action being performed, the content label contains a verb; otherwise, the label uses only the object or noun. Labels are restricted to 30 characters.

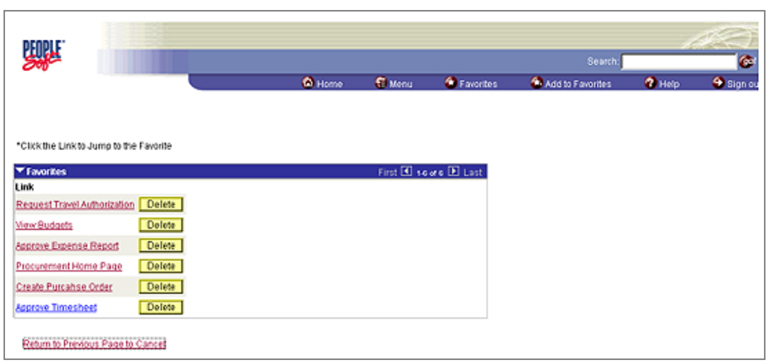
Short 254-character descriptions are also provided for most pages and folders. In the full page menu navigation, these descriptions can be seen at the lowest level. In the left hand menu, the descriptions can be seen when you float the mouse pointer over the menu selection. These descriptions also appear with search results.



A page with short 254-character descriptions

Navigation Features

The navigational hierarchy or menu provides browse navigation. Search, favorites, related links, and sub-site homepages provide additional navigational functionality. The following screen illustration shows the Favorites menu.

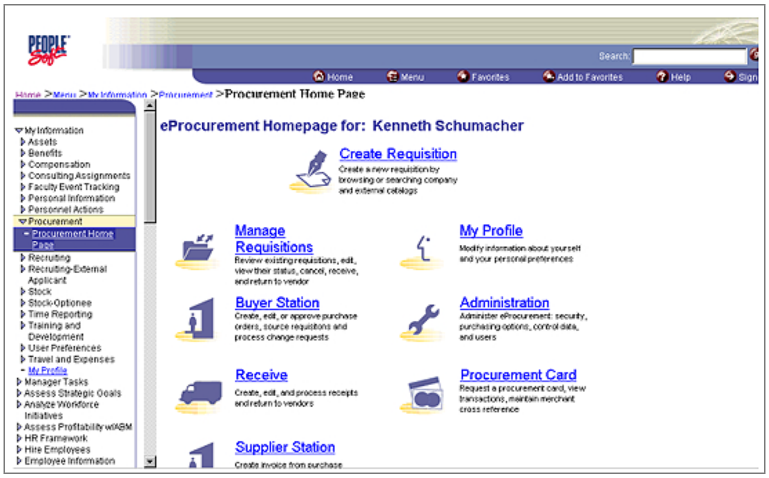


Favorites menu

For more information about the portal's navigational features, refer to the chapter Using Portal Navigation Features in the *PeopleTools Portal Technology PeopleBook.* For more information about the navigation menu and its left hand and full page navigation schemes, refer to the chapter “Using Portal Navigation”.

The following screen illustration shows the eProcurement sub-site homepage. This page organizes and presents from a single launch point all of the pages necessary to perform end-to-end Procurement business processes. There are 139 individual pages that are included in the collection of pages. In this illustration, only one link is included in the navigation structure.

However, if it is useful, each individual page included in the sub-site could also be registered as a separate link in the navigation structure. Although hidden from navigation, each of the 139 pages has been registered and can be included in a search result.



A sub-site homepage

Search Indexing

The search function searches the full path of the content reference. This means that the title of each folder as well as the title of the content item itself is included in the search.

In addition, search keywords have also been determined and assigned to each content reference to allow for additional search refinement. The following criteria were used to determine keyword requirements:

- Full spelling of any label abbreviated in the path of the content reference (for example, a keyword for *req* is *requisition*).
- Common business or industry synonyms for a term (for example, a keyword for *Procurement Card* is *credit card*).
- Commonly used variations of business terms (for example, keywords for *Purchase Order* are *PO* and *P.O.*).

For more information about the search architecture and the Verity search engine, refer to the chapter Building and Using Portal Search Indexes in the *PeopleTools Portal Technology PeopleBook.*

Loading Content References and Attributes into the Portal Registry

To start with, we discuss some basics and terminology. The portal menu structure is maintained in a set of tables that make up the portal registry. The menu structure allows for an unlimited number of hierarchical levels called folders. A folder contains either other child folders or links to the content itself. Links to the content are called content references.

When the design for the information architecture was completed, each content item and its related attributes were loaded into the portal registry. This was done in one of two ways:

1. Manual entry of individual content items through the Portal Administration user interface pages (which works for small numbers of content items).

2. Mass entry of many content items via Excel spreadsheet loaded with a special load utility.

For more information about portal administration, refer to the chapter Using Portal Administration Features in the *PeopleSoft Portal Technology PeopleBook.* For more information about file import, refer to the *PeopleSoft Enterprise Integration PeopleBook.*

Flexibility in Assembling Portal Content: The Building Block Approach

Once the super set of content was categorized, we dissected it into logical groupings to facilitate implementation and packaged it into projects. We consider these projects to be building blocks that can be used to reassemble a portal based on your needs. Projects we created include:

- Human Resources Management self-service content.
- Financial and Supply Chain Management self-service content.
- Human Resources Management–Core expert user content.
- Human Resources Management–Education and Government expert user content.
- Human Resources Management–Federal Government expert user content.
- Financial and Supply Chain Management expert user content.
- Financial Management–Education and Government self-service content.
- Student Administration self-service content.
- Customer Portal self-service content.
- Supplier Portal self-service content.

This enables you to easily load and implement self-service content first and expert user content at a later date. Whether or not you choose to include expert user content will likely drive the navigational approach you choose to implement within your portal.

For more information about how your content can drive the navigational approach for your portal, refer to "Using Portal Navigation".

You can also implement Human Resources Management content first and Financial or Supply Chain Management content later. Another approach is to implement Student Administration self-service content in a Campus portal and, later perhaps, add Customer Portal content to allow for a bookstore.

Selecting the Right Building Blocks to Assemble your Portal Registry

Since your purchased Human Resources, Student Administration and Financial Supply Chain Manufacturing products will vary, the applicable registry structures and security have been packaged by object type, use (Self-Service vs Expert) content provider database, and Product Line. You can install the data for Self-Service transactions first an then later install the data for Expert transactions. You should only copy those objects that are applicable to your purchased products.

The projects and associated datamover scripts follow a specific naming convention. This naming convention is PORTAL_<ObjectType>_<UserLevel>_<Database>_<ProductLine>.

- *ObjectType* specifies the type of objects in the project or script. It includes:
  - REG - registry structure objects
  - ROLE - security role objects.
  - PERM – security permission list objects
  - APP - database application objects
  - USR – demo User Ids
- *UserLevel* specifies the user level of the project or script contents. It Includes:
  - SS - Self-Service transactions
  - XP – Expert user transactions
- *Database* specifies the database where the objects live. Also referred to as the content provider.
  - HC - Human Resources (listed as HRMS in the ContentProvider name).
  - EP - Financials Supply Chain Manufacturing (listed as ERP in the ContentProvider name).
  - BP -Budget Planning.
  - SAHA - Student Administration 7.6 (HTML access pages).
  - GFHA - Government Financial 7.5 (HTML access pages).

- *ProductLine* specifies the use of the database. It includes:
  - EG - Education and Government
  - USF - federal
  - COM - commercial

The delivered projects and datamover scripts are independently viable. You only need to copy those projects (or scripts) that contain objects that pertain to your needs. The following charts list the delivered projects and datamover scripts. The charts have marked columns (designated with an X) that pertain to the applicable portal. Use these charts to determine which objects apply to your PeopleSoft system and portal.

The projects need to be copied to your System and Demo databases. The datamover scripts should only be run on your Demo database.

An important point is the dependencies of the registry structure objects and the permission lists. As you will see, the permission list projects are marked to be applied to your system database. This is not required, but the corresponding registry projects contain registry structures that are linked to the delivered permission lists. We suggest you use the delivered permission lists in your system database and customize them as necessary for your needs. This prevents you from having to link the delivered registry structures to new permission lists. You can use the delivered roles at your discretion. We recommend that you clone the delivered roles and adjust them for your needs. Then use the cloned roles in your system database. Of course, the delivered User IDs are only for your demo database. They're generic and used to demonstrate the filtering of the menu with the delivered security.

The roles are delivered via datamover. The datamover script imports the roles and a project definition with the name PORTAL_ROLE_xxxx. This is done for easy identification of the roles in Application Designer.

Student Administration

Database (Product Line)	Portal Projects	Datamover Script	EMPL	CAMP	GOVT
SA 760	PORTAL_REG_SS_SAHA_EG	PORTAL_ROLE_SS_SAHA_EG		X	
	PORTAL_PERM_SS_SAHA_EG	PORTAL_USR_SS_SAHA_EG		X	

Student Administration Chart

Financial Supply Chain Manufacturing					
Database (Product Line)	Portal Projects	Datamover Script	EMPL	CAMP	GOVT
FDM EG 760 (All EG)	PORTAL_REG_SS_GFHA_EG1	PORTAL_ROLE_SS_GFHA_EG1	X	X	X
	PORTAL_PERM_SS_GFHA_EG1	PORTAL_USR_SS_GFHA_EG1	X	X	X
FDM EG 760 (HIGHER ED)	PORTAL_REG_SS_GFHA_EG2	PORTAL_ROLE_SS_GFHA_EG2	X	X	
	PORTAL_PERM_SS_GFHA_EG2	PORTAL_USR_SS_GFHA_EG2	X	X	
BUDGET PLANNING	PORTAL_REG_XP_BP_EG	PORTAL_ROLE_XP_BP_EG	X	X	X
	PORTAL_PERM_XP_BP_EG	PORTAL_USR_XP_BP_EG	X	X	X
FDM 750 EG (ePro only)	PORTAL_REG_XP_EP_EG	PORTAL_ROLE_XP_EP_EG	X	X	X
	PORTAL_PERM_XP_EP_EG	PORTAL_USR_XP_EP_EG	X	X	X
FDM COMMERCIAL 800	PORTAL_REG_XP_EP_COM	PORTAL_ROLE_XP_EP_COM	X		
	PORTAL_PERM_XP_EP_COM	PORTAL_USR_XP_EP_COM	X		
	PORTAL_REG_SS_EP_COM	PORTAL_ROLE_SS_EP_COM	X		
	PORTAL_PERM_SS_EP_COM	PORTAL_USR_SS_EP_COM	X		

Financial Supply Chain Manufacturing Chart

Human Resource Management Systems					
Database (Product Line)	Portal Projects	Datamover Script	EMPL	CAMP	GOVT
HRMS BASE	PORTAL_REG_XP_HC_COM1		X	X	X
	PORTAL_REG_SS_HC_COM1		X	X	X
HRMS COMMERCIAL	PORTAL_REG_XP_HC_COM2		X		
	PORTAL_REG_SS_HC_COM2		X		
HRMS COMMERCIAL + EG	PORTAL_REG_XP_HC_COM3		X	X	X
	PORTAL_REG_SS_HC_COM3		X	X	X
HRMS EG ONLY	PORTAL_REG_XP_HC_EG		X	X	X
	PORTAL_REG_SS_HC_EG		X	X	X
HRMS USF ONLY	PORTAL_REG_XP_HC_USF		X	X	X
	PORTAL_REG_SS_HC_USF		X	X	X
HRMS SECURITY	PORTAL_PERM_SS_HC_ALL	PORTAL_ROLE_SS_HC_ALL	X	X	X
	PORTAL_PERM_XP_HC_ALL	PORTAL_USR_SS_HC_ALL	X	X	X
		PORTAL_ROLE_XP_HC_ALL	X	X	X
		PORTAL_USR_XP_HC_ALL	X	X	X

Human Resource Management Systems Chart

For more information about how to load content into the portal registry, refer to the chapter “Understanding the Portal Registry Load Process”.

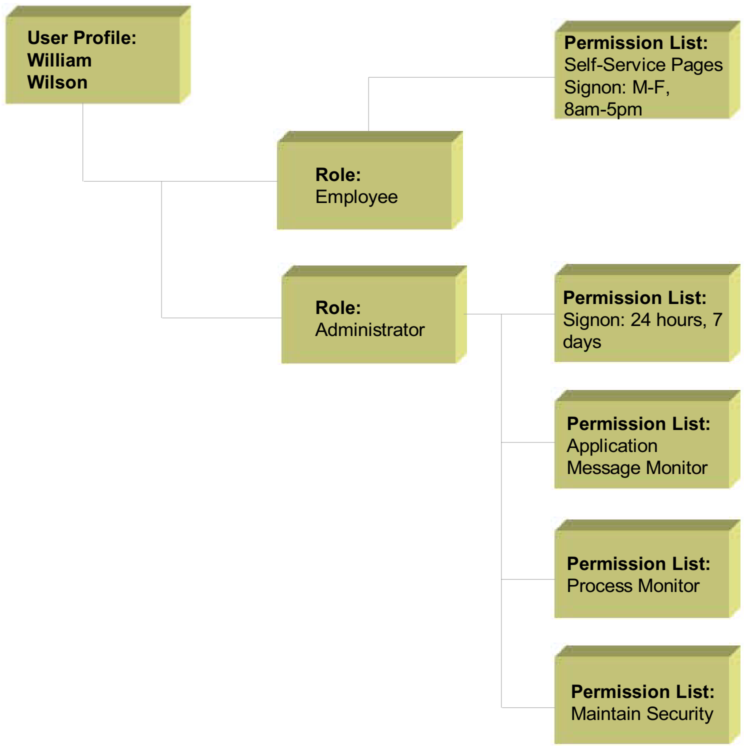
Supporting Long-Term Growth and Management

We designed the navigation structure and security setup for growth and flexibility. Naming and numbering conventions were considered carefully to include non-PeopleSoft content as well as customer-designed categories and corresponding roles and security setup.

Role-Based Security

Role-based security is a technology that plays an important part within the portal. All content is secured through the role-based security in PeopleSoft Internet Architecture. The portal displays content specific to users' roles within the organization.

Users can be associated with many roles. Moreover, as the following diagram shows, a role can be linked to multiple permission lists.



Sample role: an administrator with multiple permission lists

A permission list is simply a list (or group) of authorizations that are assigned to roles.

Permission Lists

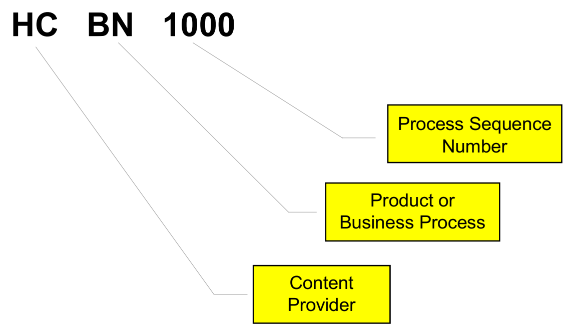
Currently, PeopleSoft has delivered more than 7,500 Uniform Resource Locators (URLs) that are accessible through the navigation structure. Each transaction has been linked to a permission list, which is part of the PeopleSoft Internet Architecture role-based security.

Approximately 1,500 permission lists have been created, and there can be one or more transactions linked to a permission list. This building block approach facilitates maintenance. Instead of managing all 7,500 transactions, the transactions have been grouped together using logical tasks within business processes by role.

Each permission list is linked to one or more of the 200 functional business roles. These roles are based on business process models that simulate the real business environment. Moreover, by using business process models, we've been able to consider the auditable separation of duties performed in an organization. The permission lists are created at a granular enough level such that where your business processes for a role vary from our sample role definitions, you should be able to add and remove permission lists where appropriate to refine your role definitions.

In your sample data, each defined role has a user ID that has been established for logging on to the portal. Using this building block approach, you can mix and match for each user the permission lists that the user requires.

The following illustration shows our permission list naming convention.



Permission list naming convention

Site maps, including mappings of all of our roles and permission lists, can be found on the accompanying files and on Customer Connection.

Defined Roles

Roles	***Roles***
Account Manager	Cost Manager
Accounts Payable Manager	Credit Analyst
Accounts Payable Specialist	Credit Manager
Accounts Receivable Specialist	Customer
AP Banking Specialist	Customer Portal Admin
AR Banking Specialist	Customer Sales Representative
Asset Management App Admin	Deal Manager
Asset Manager	Deduction Management App Admin
Asset Manager-Australia	Deductions Specialist
Asset Manager-Canada	Design Engineer
Benefits Administrator	Email/Calendar Pagelet Administrator
Benefits Administrator CAN	Employee
Benefits Administrator UK	Engineering App Admin
Benefits Administrator USA	Enterprise Planner
Benefits Administrator USF	eStore Administrator
Benefits App Admin	eStore App Admin
Benefits App Admin NLD	Expense Manager
Billing App Admin	Expenses App Admin

Roles	***Roles***
Billing Specialist	External Applicant
Bills and Routings App Admin	Faculty
Budget Coordinator	General Ledger Accountant
Business Analyst	General Pagelet Administrator
Cash Manager	Global App Admin
Company Events Publisher	Global Payroll Administrator
Company News Publisher	Global Payroll Administrator CHE
Compensation Administrator	Global Payroll Administrator FRA
Consulting Resource	Global Payroll Administrator GER
Contract Administrator	Global Payroll Administrator UK
Contract Billing Administrator	Global Payroll App Admin
Contract Financial Admin	Global Payroll App Admin CHE
Contracts App Admin	Global Payroll App Admin FRA
Cost Engineer	Global Payroll App Admin GER
Cost Management App Admin	Global Payroll App Admin UK
GUEST	Human Resource Specialist USF
Health and Safety Administrator	Inventory Agent
Health and Safety Administrator CAN	Inventory App Admin
Health and Safety Administrator CHE	Inventory Manager
Health and Safety Administrator ESP	Legal Administrator
Health and Safety Administrator FRA	Manager
Health and Safety Administrator GER	Mobile Order Mgmnt Admin
Health and Safety Administrator UK	News & Events Pagelet Administrator
HR App Admin	Optionee
HR App Admin BEL	Order Management App Admin
HR App Admin CAN	Order Promising App Admin
HR App Admin EG	Payables App Admin
HR App Admin ESP	Payroll Administrator
HR App Admin FRA	Payroll Administrator CAN
HR App Admin GER	Payroll Administrator EG
HR App Admin ITA	Payroll Administrator FRA
HR App Admin JPN	Payroll Administrator P.Rico

Roles	***Roles***
HR App Admin NLD	Payroll Administrator USF
HR App Admin UK	Payroll App Admin
HR App Admin USA	Payroll App Admin CAN
HR App Admin USF	Payroll App Admin FRA
Human Resource Specialist	Payroll App Admin P.Rico
Human Resource Specialist BEL	Payroll App Admin USA
Human Resource Specialist CAN	Payroll App Admin USF
Human Resource Specialist CHE	Payroll Interface App Admin
Human Resource Specialist EG	Pension Administrator
Human Resource Specialist ESP	Pension App Admin
Human Resource Specialist FRA	PeopleTools
Human Resource Specialist GER	Practice Manager
Human Resource Specialist ITA	Product Configurator App Admin
Human Resource Specialist NLD	Production Management App Admin
Human Resource Specialist UK	Production Manager
Human Resource Specialist USA	Production Planning App Admin
Professional Services Account Manager	Salesperson
Project Manager	Staffing Coordinator
Project Team	Stock Administrator
Projects App Admin	Stock App Admin
Purchasing Agent	Supplier-Account Manager
Purchasing App Admin	Supplier-Application Admin
Purchasing Manager	Supplier-AR Specialist
Quality Engineer	Supplier-Customer Service Rep
Receivables App Admin	Supplier-Engineer
Receiving Agent	Supplier-Production Manager
Recruiter	System Administrator
Recruiter BEL	Task Administrator
Recruiter GER	Time and Labor Administrator
Recruiter USF	Time and Labor App Admin
Registry Administrator	Training Administrator
Remote Order Entry App Admin	Training Administrator FRA

Roles	***Roles***
Resource Administrator	Training Administrator GER
Resource Management App Admin	Training Administrator USF
Resource Management Customer	Treasury Accountant
Resource Manager	Treasury App Admin
Resource Manager Self-Service	Web Publishing Administrator
Risk Manager	
Sales Agent	

Full detailed listings of all roles and permission lists can be found on Customer Connection.

Related Information Links

Related links provide access to web pages that contain related information. Simply click a related link to jump to the associated URL. In this way, related links extend your navigation to other reference sources with one click.

In the following screen illustration, a sales order entry page displays related links for information about product availability, order status, and shipment tracking. The related links appear on the right side of the page when you are using full page navigation.

Sales Order Entry page with related links

Related links appear below the navigational hierarchy when you are using left-hand navigation.

The portal displays only those links to which the user has access. When the user doesn't have security access and, consequently, links are not available within a related link group, the page hides the empty related group label.

For more information about related links, refer to the chapter "Understanding Related Links".

C H A P T E R 4

Understanding the Integrated Task List Pagelet

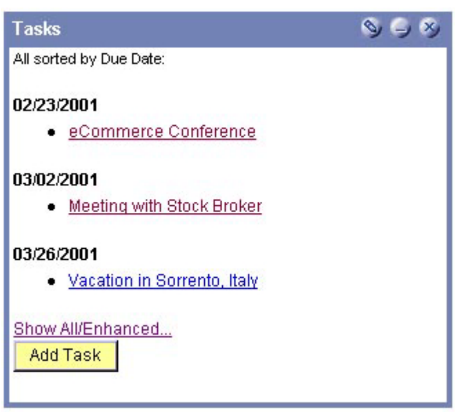
The Integrated Task List is the tool that keeps track of your tasks and personal reminders from across your business solutions. It displays your list of task items and enables you to add or edit a personal task. You can also use the Integrated Task List to access a PeopleSoft Worklist.

The Integrated Task List pagelet displays only task items that are associated with the user name that is specified when you log on to the system.

Most of this chapter contains information for portal users, that is, anyone who wants to learn and use the Integrated Task List pagelet. The last section, "Setup," discusses how to implement the Integrated Task List pagelet and is intended for portal system administrators.

Looking at the Integrated Task List Pagelet

As the following graphic illustrates, the Integrated Task List pagelet is designated simply with the word *Tasks*.



Integrated Task List pagelet

Task items are sorted by due date. Below each due date, the list of task items appears. Each task item can have a maximum of two indicators that appear after it: a file attachment indicator and/or the unviewed indicator.

The task list uses the following indicators:

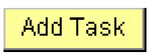
The green star appears when a worklist item hasn't been selected.

The yellow calendar appears when the due date is prior to the system date. When the date for a task item is prior to the system date, the yellow calendar appears right after the date.

The paper clip appears when you attach a file to a personal task.

Show All/Enhanced

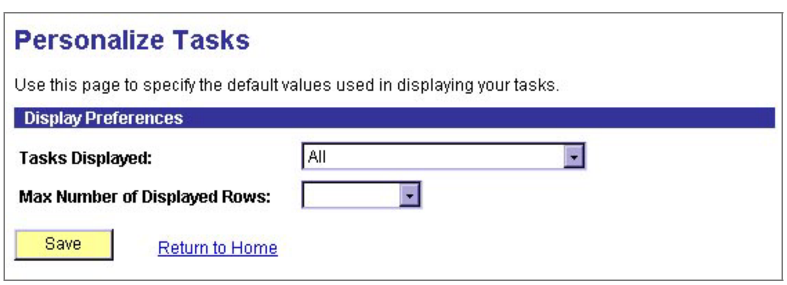
Click the **Show All/Enhanced** link to see the rest of your task items.



Click the **Add Task** button to access the Task Details page. On the Task Details page, you can add a new task item or edit an existing task item.

Setting Your Preferences

Usage	Use the Personalize Tasks page to change the display settings on the Integrated Task List pagelet. Display settings can be adjusted with predefined user preferences.
Object Name	EO_PE_TASK_PREF
Navigation	Click the Customize button in the title bar of the Integrated Task List pagelet to access this page.



Personalize Tasks page

Use the following page controls to set or change your preferences for data displayed on the Integrated Task List pagelet.

Tasks Displayed	Specify the default filter values that control the type of data that appears. You can select ***All, Complete, In Process, New, On Hold, Routed Tasks,*** or ***Task.***
	Note. Routed Tasks are PeopleSoft Worklist items.
Max Number of Displayed Rows (maximum number of displayed rows)	Specify the total number of rows to be displayed. You can select ***5, 10, 15, 20,*** or ***25*** rows. If you don't select a value, all rows appear.
	Click the **Save** button to save your preferences to the Integrated Task List pagelet.
Return to Home	Click this link to return to the portal home page.

Viewing Your Task List

The way your task list appears is based on the preferences that you specify on the Personalize Tasks page:

- If you don't specify a preference on the Personalize Tasks page, the heading "All sorted by Due Date" appears before the list of task items. Your task items are then sorted and displayed by due date.
- If you set your preferences to display new task items only, the heading "New Task(s) sorted by Due Date" appears before the list of task items. Only new task items are sorted and displayed by due date.

The preference headings appear only if there are entries in the list that relate to the preference that you have specified. If the system doesn't find an entry that matches your preference setting, the text "No *xxxxx* entries found" appears, where *xxxxx* is the preference value that you specified.

When the Show All/Enhanced link appears:

- You have specified a maximum number of items to appear, and the matching entries exceed that number. In that case, the link appears as More.
- You have specified a maximum number of items to appear, and the matching entries don't exceed that number. The link appears as Show All/Enhanced.
- You have specified not to view all items and no matching entries exist. For example, you'd like to view the new entries only, but no matching entries were found. The link appears as Show All/Enhanced.
- You haven't specified any pagelet preferences. As a result, the system retrieves by default the items that are used. If matching entries exist, the link appears as Show All/Enhanced.

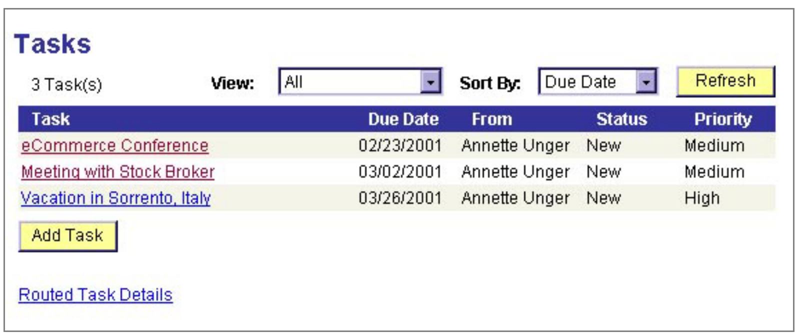
Filtering and Sorting Your Task Items

The enhanced version of the Tasks page provides you with real-time views of the following tasks:

- Tasks that have the status of New, On Hold, In Process, or Complete.
- Personal tasks.
- Routed tasks, such as PeopleSoft Worklist items.

Tasks Page: Enhanced Version

Usage	Use the enhanced version of the Tasks page to view and filter your task items.
Object Name	EO_PE_TASK_LIST
Navigation	Click the Show/All Enhanced link on the Integrated Task List pagelet to access this page.



Tasks page: enhanced version

View

Displays the values that you can use to filter the displayed task items. You can specify the default filter value when you personalize the Integrated Task List pagelet. If the default filter is not specified, the system applies the ***All*** value as the default. Select from the following values:

All: This includes all work and task items.

Complete: Only the work items that have been completed appear.

In Process: This is the default status for work items that have been selected but not completed and for personal tasks that are in process.

New: The default status for new personal tasks and work items that have not been selected.

On Hold: Only personal tasks that are on hold appear.

Routed Task: Only the Worklist items appear.

Task: Only the personal tasks appear.

Sort By

Displays the values that you can use to sort the displayed task items, selected from the following values:

Due Date: The due date of your task.

From: The person who delegated or created the task.

Priority: Work items always default to **Priority *1.***

Status: Refers to the status of a work item: ***New*** if it hasn't been selected, ***In process*** if it has been selected but not yet worked, or ***Complete*** if it is already marked as *worked.*

Task: Your work item or personal task.

Refresh

Click the **Refresh** button to refresh the screen.

Task

The names of the task items. In each row, the task name appears as a link. Click a personal task to access the Task Details Page, where you can view the detailed description of the task. Click a Worklist item to access the associated transaction page. Your task items are organized and displayed according to the filter value that you selected. Your task items are also sorted and displayed according to the Sort Value that you selected.

Due

The due date of each task.

From

The name of the person who designated the task.

Status

The status of each task.

Priority

The priority of the tasks.

Add Task

Click the **Add Task** button to access the Task Details Page.

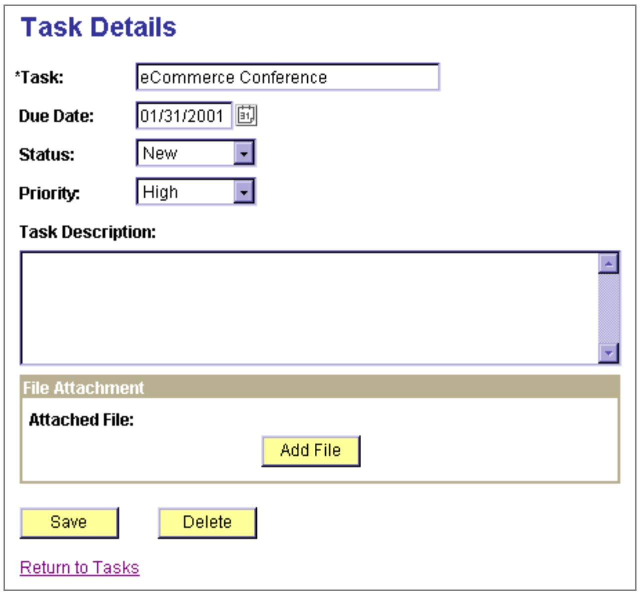
Routed Task Details

Click the **Routed Task Details** link to access the Worklist Summary page, where you can view the entire Worklist, reassign tasks, or review Worklist details.

PeopleTools Workflow documentation provides an extensive discussion of the Worklist Summary page.

Task Details Page

Usage	Use the Task Details page to view or add the detailed description of a personal task.
Object Name	EO_PE_TASK_DTL
Navigation	Click the Add Tasks button on the enhanced version of the Tasks page to access the Task Details page.



Task Details page

Task Enter the name of the task. The task name is required.

Due Date Enter the due date of your task. You can also add the **Due Date** by clicking the calendar button: . This opens the calendar window, and you can select a date from the calendar. The **Due Date** field is optional.

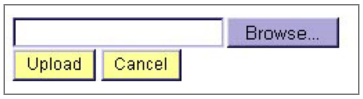
Status Select a value for the **Status** field from the drop-down list box: ***Complete, In Process, New,*** or ***On Hold.*** Select one of the values to specify the status of your task. To mark a personal task as done, select ***Complete.*** The system removes the task from the active list.

Task Description Enter a description of the task in the **Task Description** field. The description is optional.

File Attachment

Add File Click the **Add File** button to attach a file to a task item.

When you click the **Add File** button, the following page controls appear on a new page:



Attaching the file

Browse	Click the **Browse** button to find the file or enter the file name in the text box.
Upload	Click the **Upload** button to attach the file.

When a file is attached to a task item, the **File Attachment** region appears as in the screen illustration:

File Attachment

Attached File	The name of the file appears in the **Attached File** field.
View	Click the **View** button to view the file.
Delete File	Click the **Delete File** button to disassociate the file from the task entry and remove the file from the file server where it is stored.

Attaching a file is optional. Moreover, you can attach only one file to each task item. If you have multiple files and you would like to attach them to a task item, compress all the documents into one file and attach it to the task item.

Saving and Deleting Entries

	Click the **Save** button to save your entries.
	Click the **Delete** button to delete all entries. This also removes the file that is associated with the task from the file server.
Return to Tasks	Click this link to return to the Tasks page.

Configuring Setup for the Integrated Task List

The following tasks are required for the pagelet's configuration and setup:

- Ensure that the enhanced version of the Tasks page uses the PORTAL_STMP_HOMEPAGE template, or any HTML (Hypertext Markup Language) template, for registration so that the proxy is automatic.
- Ensure that the Task Details page uses the PORTAL_DEFAULT, or any frame template, for registration. This enables the file attachment feature.
- Ensure that the Personalize Tasks page uses the PORTAL_STMP_HOMEPAGE template, or any HTML template, to enable the Return to Homepage link.
- Ensure that the WORKLIST and WORKLIST_DETAIL components are registered in an HTML template.
- Ensure that you have activated public or permission list security for all registered content references.

The Integrated Task List leverages PeopleSoft Application Messaging and XML technology to allow you to integrate tasks from any system within your implementation. This is also useful to aggregate worklists from across PeopleSoft applications.

For more information about the XML format used for the Integrated Task List, refer to the Worklist Synchronization entry in the EIP Catalog of *PeopleSoft Enterprise Integration PeopleBook.*

The remainder of this section describes how to configure PeopleSoft Application Messaging for the WORKLIST component. It includes the following:

- Publishing and subscribing systems on your domain.

  Refer to the application server's documentation for information about how to set up the Publish and Subscribe systems on your domain.

- Setting up PeopleSoft Application Messaging for WORKLIST_MSG.

  See the Worklist installation documentation for setting up PeopleSoft Application Messaging for WORKLIST_MSG.

For more information, refer to PeopleSoft Application Messaging in the *PeopleTools PeopleBook.*

- Ensuring that the portal database is listed as one of the message nodes for the message channel WORKLIST_CHNL.
- Ensuring that the message object WORKLIST_MSG is active and that the channel WORKLIST_CHNL is in run mode.

The most important aspect of setting up Peoplesoft Application Messaging is this task: ensuring that the portal database is listed as one of the message nodes.

To ensure that the portal database is listed as one of the message nodes:

1. Create a message node that represents your portal database.
2. Insert the node that you created under Routing Rules for the WORKLIST_CHNL, and specify both Publish To and Subscribe From directions.
3. See the Worklist documentation to determine whether the other participating nodes (aside from the portal) contain both Publish To and Subscribe From directions. The portal database, however, must have this attribute.

Tasks that are related to PeopleSoft Application Messaging must be performed for all participating databases, including the portal database. For example, to include Worklist items from a Human Resource Management System (HRMS) and Enterprise Resource Planning (ERP) database in the portal, three nodes—HRMS, ERP, and PORTAL—must be defined under the message channel for each node.

Other Implementation Tasks

In order to complete the setup for using the Integrated Task List, you must also perform these tasks:

- Schedule the worklist replication process according to how frequently near-real-time updates are sent to and from the portal database.
- Set Application Messaging for standard operator/user security.
- Specify a File Transfer Protocol (FTP) site for file attachment functions. This is achieved with the URL Maintenance component of the portal database (select PeopleTools, Utilities, Use, URL Maintenance). The URL identifier “Tasks” is reserved for use by the Integrated Task List pagelet. This identifier is used throughout the tasks' PeopleCode.

Setting up the Worklist Application Messaging Table Sync (Optional)

Setup for the Worklist Application Messaging Table Sync is optional. The display items that are retrieved from the Worklist table Application Messaging must be selected to sync up the Worklist tables between the portal database and other accessed PeopleSoft databases. In the section that follows, we provide an overview of setting up the application messaging for the Worklist Table Sync.

This chapter does not contain detailed instructions for configuring Application Messaging or setting up Message Gateway locations. Configuration of Application Messaging and Enterprise Integration Points (EIP) can vary greatly depending upon your environmental settings. For more information about Application Messaging and setting up Message Gateway Locations, refer to PeopleSoft Application Messaging in the *PeopleTools PeopleBook.* For more information about implementing and using PeopleSoft EIPs, refer to the *PeopleSoft Enterprise Integration PeopleBook.*

Each database contains a local message node, as well as additional message nodes for each connecting database. The additional message node names must match exactly the local message node name in the connecting database.

Database	***Message Node***	***Local Node?***
PA	PSFT_PE	Yes
PA	PSFT_HR	
PA	PSFT_EP	
HRMS	PSFT_PE	
HRMS	PSFT_HR	Yes
HRMS	PSFT_EP	
FDM	PSFT_PE	
FDM	PSFT_HR	
FDM	PSFT_EP	Yes

Configuring Message Node Locations

For table sync to work, the message nodes require a gateway location. The following steps must be repeated in two-tier connections for every database that you want to conduct a worklist table sync.

To configure Message Node locations:

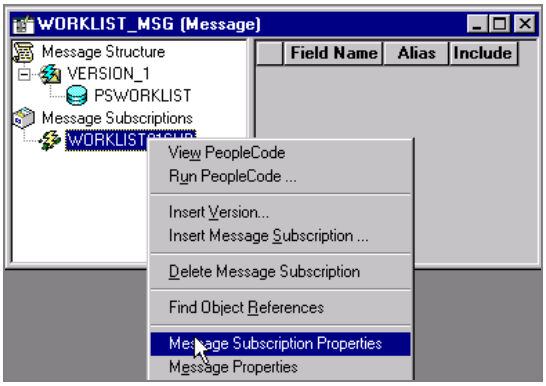
1. Open the database's local message node in Application Designer.
    a. Right mouse-click on the node, and then select Insert Location.
    b. Enter the location that corresponds to this database's web server, and then click OK.
    c. Select File, Save to save the Message Node.
2. Open each of the additional message nodes for the connecting databases in Application Designer.
    a. Right mouse-click on the node, and then select Insert Location.
    b. Enter the location that corresponds to the connecting database's web server, and then click OK.
    c. Select File, Save to save the Message Node.

Activating the Worklist Message

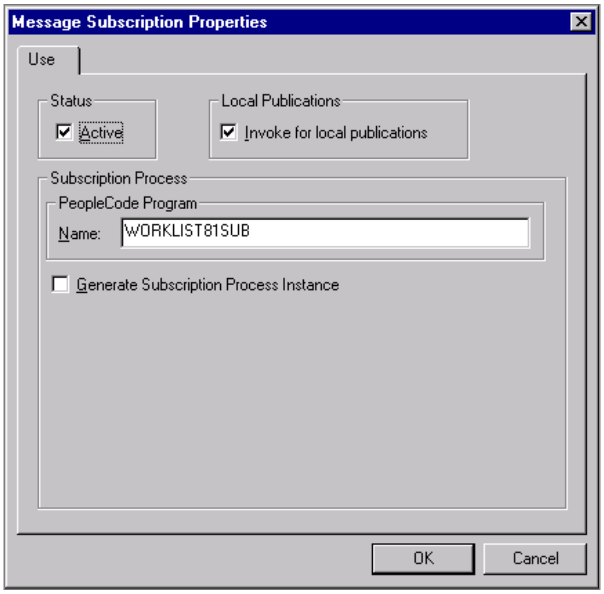
The following steps must be repeated in two-tier connections for every database for which you want to conduct a worklist table sync.

To activate the Worklist Message:

1. Check that the message is active.
    a. In Application Designer, open the Message WORKLIST_MSG.
    b. Select File, Object Properties.
    c. Click the Use tab.
    d. Make sure that the Status Active check box is selected. Click OK.
2. Check that the Message Subscription is active.
    a. From Application Designer, open the Message WORKLIST_MSG.
    b. Right mouse-click on the Message Subscription WORKLIST81SUB.
    c. Select Message Subscriptions Properties.



Worklist MSG (Message)



Message Subscription Properties

d. Make sure that the Status **Active** box is selected in the **Use** tab.

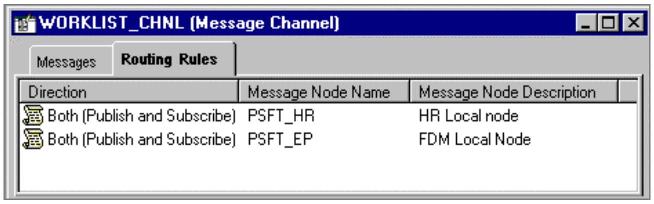
Inserting Message Nodes into the Worklist Message Channel

The following steps must be repeated in two-tier connections for every database that you want to conduct a worklist table sync.

To insert message nodes into the Worklist Message Channel:

1. From Application Designer, open the Message Channel WORKLIST_CHNL.
2. Click the Routing Rules tab.
3. Select Insert, Insert Message Node.
4. Insert the message nodes for the connecting databases that you want to sync up.

Direction should be Both (Publish and Subscribe). The Message node for the database you are in does not need to be inserted into the Message Channel.



Message Nodes inserted in the WORKLIST_CHNL on the PA database

5. Close the Insert Message Node window.

6. Select File, Save to save the message channel.

Testing for Cross Node Publication and Subscription

The following steps must be repeated for every database that you want to do a worklist table sync.

To ping nodes to test for cross-node publication and subscription:

1. Log on to the database using PIA (PeopleSoft Internet Architecture).

2. Select PeopleTools, Application Message Monitor, Use, Application Message Monitor.

3. Select the Node Status tab.

4. Select the database's Local Message Node from the drop-down list box.

5. Click Ping Node**.**

   The result should indicate *Successful.*

6. Select the message nodes for each of the additional databases from the drop down list box.

7. Click Ping Node.

   The result should indicate *Successful.*

Running the Worklist Replicate Process

To sync up the worklist tables in the publishing and subscribing databases, run the Worklist Replicate process in all databases that are to be in sync. The following steps must be repeated for every database that requires a worklist table sync.

For more information about the Worklist Replicate process, refer to Replicating Worklists in *PeopleTools' PeopleSoft Workflow PeopleBook.*

To run the Worklist Replicate process:

1. Log on to the database using PIA (PeopleSoft Internet Architecture).
2. Select PeopleTools, Workflow Administrator, Process, Worklist Replicate.
3. Add *TEST* as the Run Control ID.
4. Insert the Server URL, using the following URL format: http://localhost/servlets/iclientservlet/peoplesoft8/. Replace the localhost portion with the hostname of the web server (for the database you are in), and replace peoplesoft8 with the web server folder name (for the database you are in).
5. Click Run.

Worklist Replicate process page

C H A P T E R 5

Using the Company News Pagelet

In this chapter, we consider the Company News pagelet as a “publication” consisting of related news sections. Article titles are listed beneath their related news section. The viewer clicks an article title to read that article.

Company News publication

We describe, by user role, the tasks required to create a Company News publication, including how to publish articles and how to use and customize the publication. The user roles are:

- Component administrator
- Content author
- Content publisher
- Content viewer

Overview of Creating a Company News Publication

The following list summarizes the tasks required to create a Company News publication:

1. The component administrator must complete the following duties:

   a. Create a publication (or multiple publications) using the Publication Maintenance page.

   b. Define the news sections using the News Section Maintenance page.

   c. Assign content publishers to sections using the Maintain Publishers page.

d. Define viewer roles using the Maintain Roles List page.

e. Register the publication using the Content Reference page.

f. Establish the publication's access type using the Content Reference Security page.

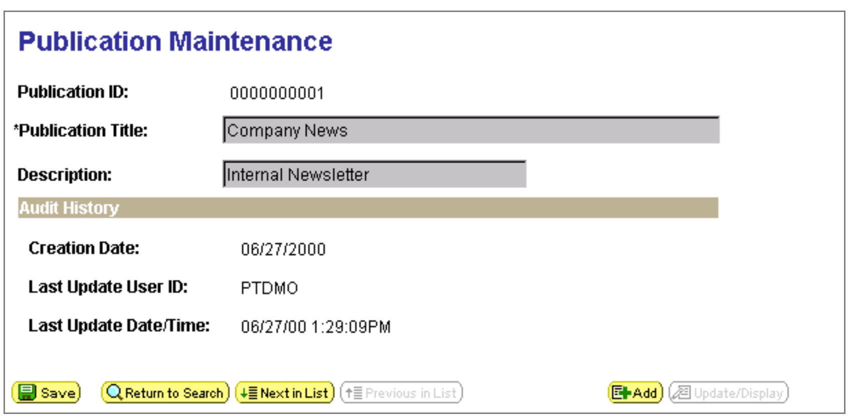
2. After the publication has been registered, content authors write and submit articles, and then select the publication under which to publish the articles using the Articles page.

3. Each news section's content publisher reviews and assigns statuses to the articles using the Manage Articles page.

4. Content viewers can personalize a publication by selecting the optional news sections they would like to see. Content viewers are typically company employees, but viewers can also be any portal users who view information provided by the company.

Creating a News Publication

Usage	Use the Publication Maintenance page to create and maintain news publications.
Object Name	EO_PE_COM_TBL
Navigation	**Home, Menu, Portal Administration, Pagelet Administration, Company News, Publications**
Prerequisites	None
Access Requirements	None



Publication Maintenance page

Publication ID After saving this information, the system assigns and displays the publication ID. You will use this same ID (including any leading zeroes) when you register the publication in the portal registry.

Publication Title Enter a publication title.

Description Enter an optional publication description.

Audit History

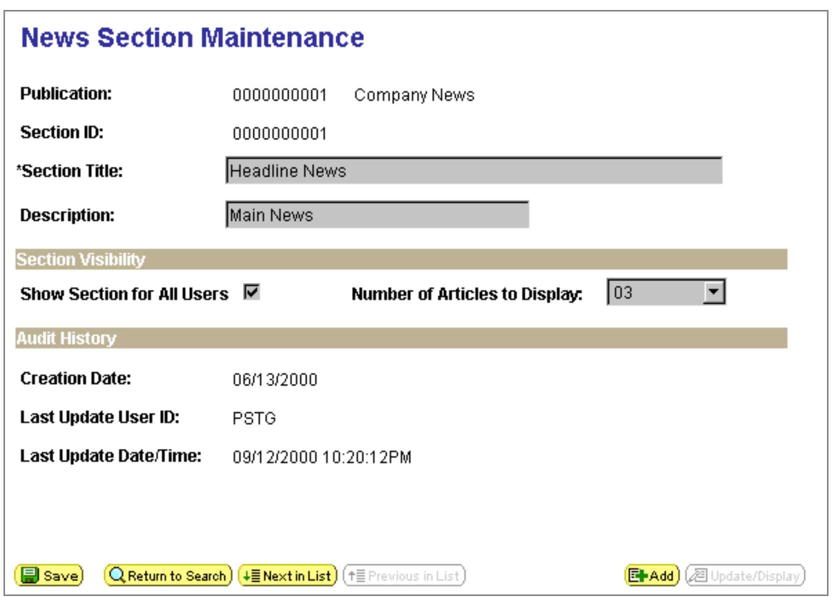
Creation Date After first saving this information, the system records the date of creation.

Last Update User ID Displays the User ID of the author of the last change.

Last Update Date/Time Displays the date and time of the last change.

Defining a News Section

Usage	Use the News Section Maintenance page to create and maintain news sections for a publication.
Object Name	EO_PE_CAT_TBL
Navigation	**Home, Menu, Portal Administration, Pagelet Administration, Company News, News Sections**
Prerequisites	None
Access Requirements	Enter a Publication ID or a Section ID.



News Section Maintenance page

Publication Displays the Publication ID.

Section ID Displays the Section ID.

Section Title Enter a section title.

Description Enter an optional description of the section.

Section Visibility

Show Section for All Users Select this check box if this news section must be displayed to all viewers.

Number of Articles to Display Only if you have selected the **Show Section for All Users** check box, can you choose the number of articles to display in this news section. Select the number of articles to display from the drop-down list box.

Audit History

Creation Date After first saving this information, the system records the date of creation.

Last Update User ID Displays the User ID of the author of the last change.

Last Update Date/Time Displays the date and time of the last change.

When you create a news section, the system automatically assigns the creator's ID as the publisher for that news section.

Assigning Section Publishers

Usage	Use the Maintain Publishers page to assign or remove publishers from a section.
Object Name	EO_PE_PUB_TBL
Navigation	**Home, Menu, Portal Administration, Pagelet Administration, Company News, News Section Publishers**
Prerequisites	None
Access Requirements	Enter a Publication and a News Section.

Maintain Publishers page

Publication Displays the Publication ID and name.

News Section Displays the Section ID and name.

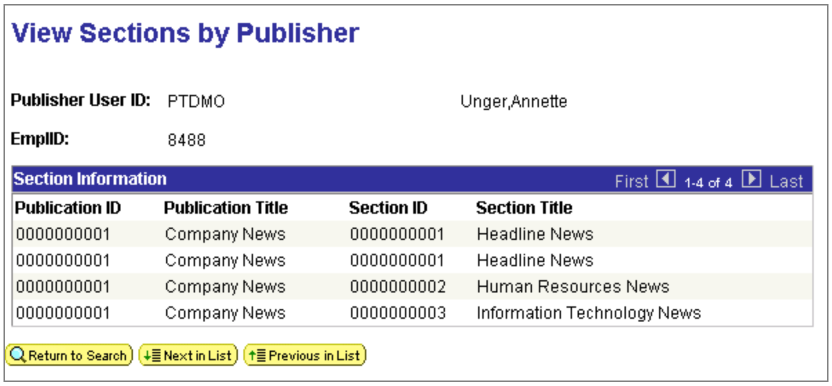
Enter the User ID's of the Publishers

Publisher User ID When you create a news section, the system automatically assigns the creator's ID as the publisher for that news section. However, the component administrator has the option of assigning other publishers. You can search for Publisher User IDs using the search icon. If needed you may assign multiple publishers to one news section.

Operator Definition Descr (operator definition description) Displays the description of the Publisher User ID.

Viewing Sections Assigned to Publishers

Usage	Use the View Sections by Publisher page to review all the publication sections that are currently assigned to any publisher.
Object Name	EO_PE_SECPUB_TBL
Navigation	**Menu pagelet, Portal Administration, Pagelet Administration, View Sections by Publisher**
Prerequisites	To see results on this view only page, you need to have assigned publication sections to specific publishers.
Access Requirements	Specify a Publisher User ID, the publisher's EmplID, or the publisher's Operator Definition Description.



View Sections by Publisher page

Publisher User ID Displays the Publisher's User ID and the Publisher User ID's description if available.

EmplID Displays the publisher's EmplID (Employee ID) if available.

Section Information

Publication ID Displays the Publication ID.

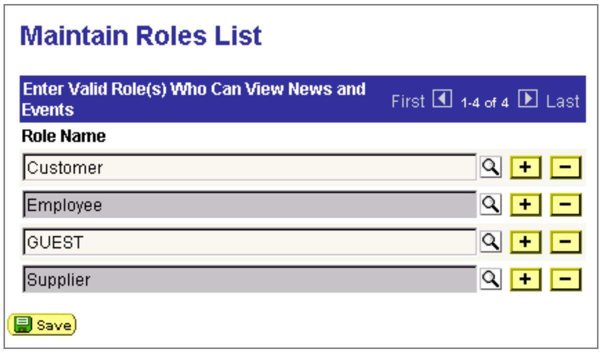
Publication Title Displays the Publication Title.

Section ID Displays the Section ID.

Section Title Displays the Section Title.

Setting Up Roles

Usage	Use the Maintain Roles List page to specify which roles will be used on the Articles page from which authors will select who will be able to view company news.
Object Name	EO_PE_ROLE_TBL
Navigation	**Home, Menu, Portal Administration, Pagelet Administration, Roles**
Prerequisites	None
Access Requirements	None



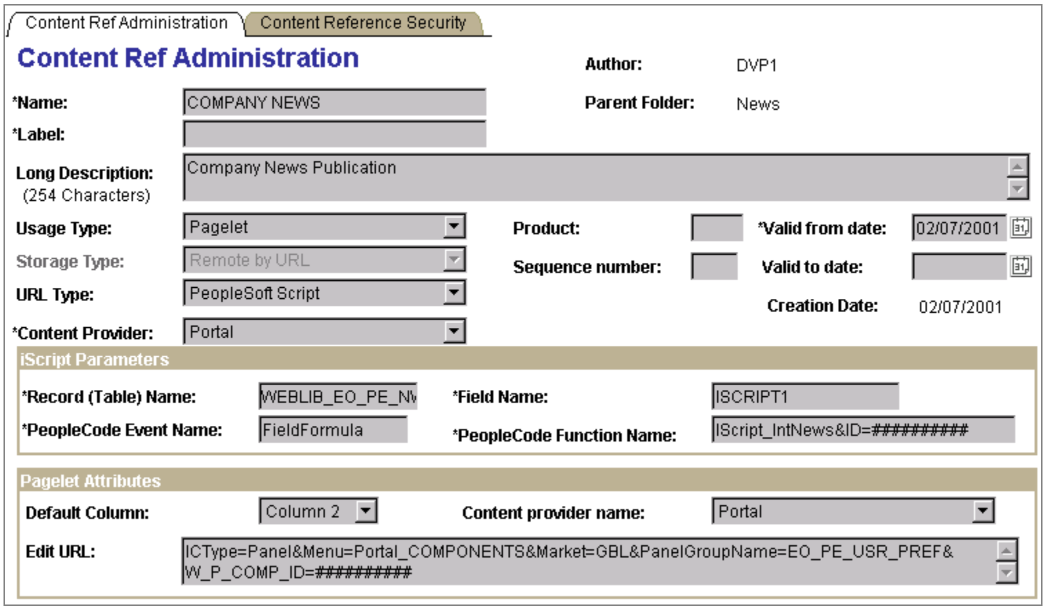
Maintain Roles List page

Enter Valid Role(s) Who Can View News and Events

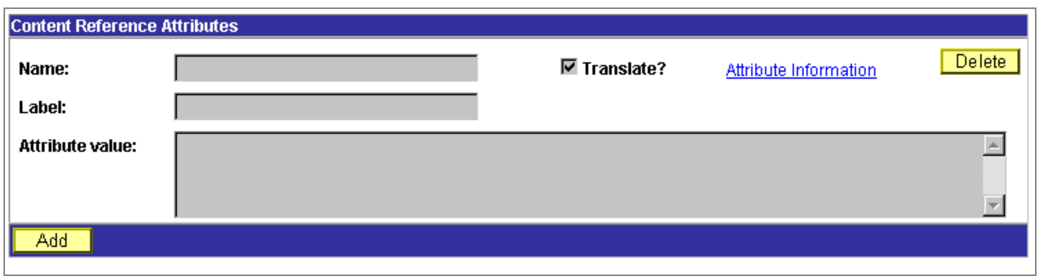
Role Name Enter a role name. You can search for roles using the search icon. If needed you may assign multiple roles.

Registering the Publication

Usage	Use the Content Reference page to register a publication.
Object Name	PORTAL_CREF_ADM
Navigation	**Home, Menu, Portal Administration, Structure and Content, Base Portal Data, Pagelets, News, Add Content Reference, Content Ref Administration**
Prerequisites	Create a publication and know the publication ID.
Access Requirements	None



Content Reference page (1 of 2)



Content Reference page (2 of 2)

Name
Enter the name of the publication. PeopleSoft recommends that you enter the same title that you specified on the Publication page.

Author
Displays the author's ID.

Label
Displays the menu item from the navigation path.

Parent Folder
Displays the parent folder.

Long Description
Optional entry. Enter a description of the publication.

Usage Type
Select ***Pagelet.***

Product
Leave this field blank.

Valid from date
The default value for this field is today's date. You can enter a future date for the pagelet registry to begin, or click the calendar button to select a date.

Storage Type	No entry is required.
Sequence Number	This is an optional entry to specify in what order this pagelet selection appears on the Personalize Content page.
Valid to date	Enter the last day for the pagelet to be registered, or click the calendar button to select a date.
URL Type	Select ***PeopleSoft Script.***
Creation Date	Displays the article's creation date.
Content Provider	Select ***Portal.***

iScript Parameters

Record (Table) Name	Enter **WEBLIB_EO_PE_NW.** All content viewers must have access to this weblib through the Maintain Security Weblib tab.
Field Name	Enter **ISCRIPT1.** All content viewers must have access to this weblib through Maintain Security Weblib tab.
PeopleCode Event Name	Enter **FieldFormula.** All content viewers must have access to this weblib through Maintain Security Weblib tab.
PeopleCode Function Name	Enter **IScript_IntNewsd&ID=##########** (########## = The publication ID assigned when the publication was created.

Pagelet Attributes

Default Column	Select whichever column you prefer.
Content provider name	Select ***Portal.***
Edit URL	Enter: ***ICType=Panel&Menu=PORTAL_COMPONENTS&Market=GBL&PanelGroupName=EO_PE_USR_PREF&WP_COMP_ID=##########*** (########## = publication ID)

Content Reference Attributes

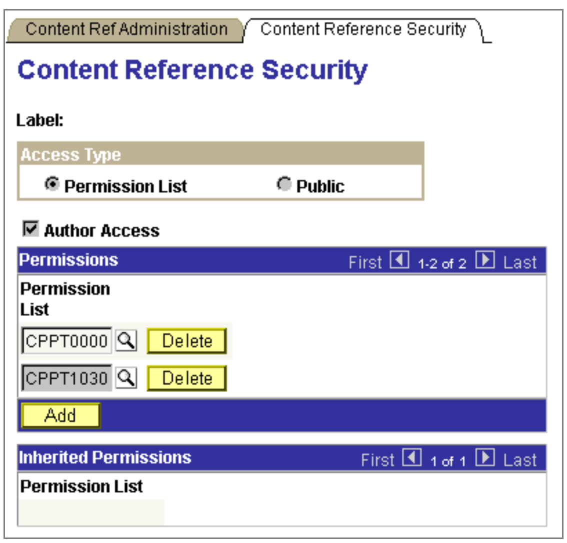
Name	Leave blank.
Translate?	Leave blank.

Label Leave blank.

Attribute Value Leave blank.

Setting Security

Usage	Use the Content Reference Security page to establish a publication's access type.
Object Name	PORTAL_CREF_SEC
Navigation	**Home, Menu, Portal Administration, Structure and Content, Base Portal Data, Pagelets, News, Add Content Reference, Content Reference Security**
Prerequisites	Content Reference Security is the second page in the Add Content References component. You must first complete the Content Reference page.
Access Requirements	None



Content Reference Security page

Label Displays the article's label.

Access Type

Permission List Select this option if you want to grant access to only those users you specify on a permission list.

Public Select this option if you want to grant access to all users.

Permission List Access

The following fields appear only if you select ***Permission List*** as the **Access Type.**

Author Access	Select this check box if you want to grant access to the publication's author.

Permissions

Permission List	Enter those groups to which you want to grant access. You can search for roles using the search icon.

Make sure that the permission list that you create coincides with the roles you have set on a specific article.

For more information about setting roles on a specific article, see Submitting Articles and Assigning Viewer Roles.

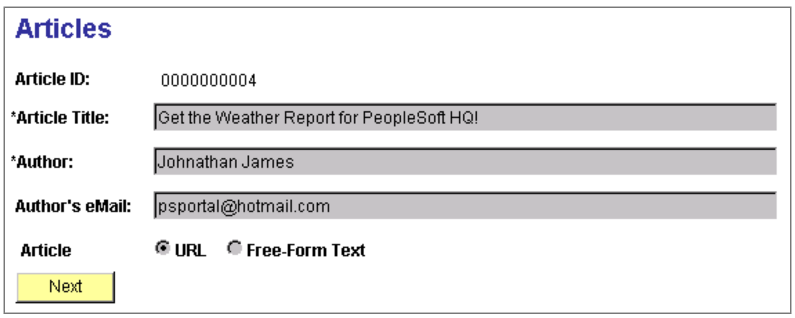
Submitting Articles and Assigning Viewer Roles

To submit articles and assign viewer roles:

1. Enter information on the Articles page.
2. Select the article's format, either URL or Free-Form Text.
3. Click **Next.** The system will then alter the page to accept the article's format. It will display either the URL or the HTML Area fields.
4. Enter the URL or the HTML.
5. If there is an accompanying image, enter its URL. This is used only for Top Stories.
6. Enter the date of publication and removal.
7. Select the News Section.
8. Select the Viewer Roles.

Articles Page

Usage	Use the Articles page to submit articles and assign viewer roles. The content must be in text, HTML, or have its own URL.
Object Name	EO_PE_CON_TBL1
Navigation	**Home, Menu, Portal Administration, Pagelet Administration, Company News, Enter Articles**
Prerequisites	None
Access Requirements	Enter an Article ID.



Articles page

Article ID The assigned article ID. The ID is automatically assigned when the article is submitted.

Article Title Enter the title of the article.

Author Enter the author's name.

Author's eMail Enter the author's email address.

URL or **Free-Form Text** Select **URL** to display the article in the context of an originating web site.

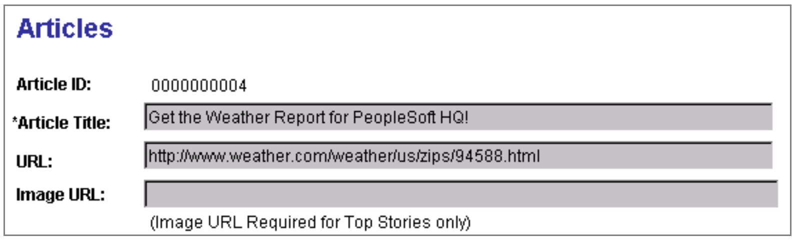
Select **Free-Form Text** to supply the article text in free form or HTML.

Next Click to continue the process.

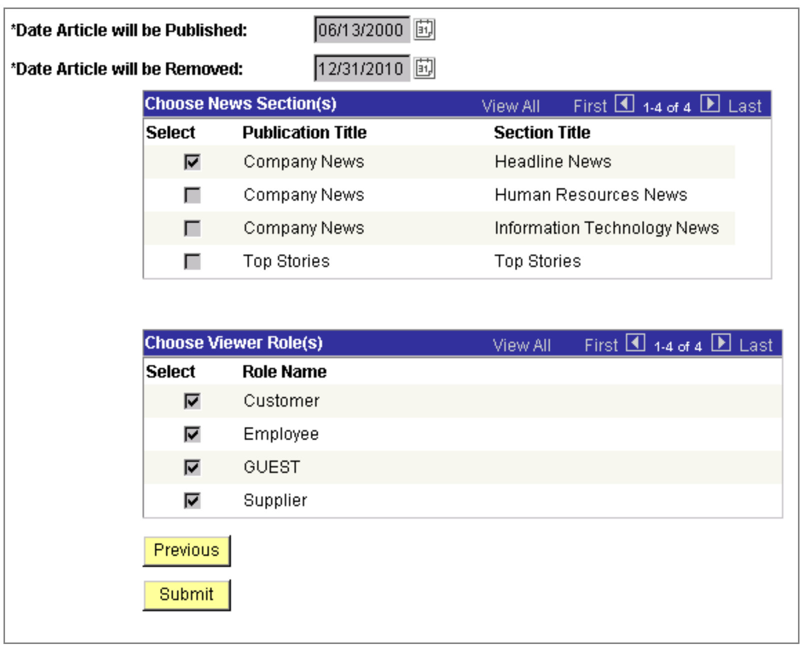
Articles (Next Page)

Usage	Use the Articles page to enter the article's URL or HTML, date of publication, and date of removal. You will also select the article's news section and viewer roles.
Object Name	EO_PE_CON_TBL2

Navigation	**Home, Menu, Portal Administration, Pagelet Administration, Company News, Enter Articles, Next**
Prerequisites	This is the second portion of the Enter Articles page. You must first enter information on the first portion.
Access Requirements	Enter an Article ID.



Articles page (1 of 2)



Articles page (2 of 2)

Article ID	Displays the article's ID.
Article Title	Enter the article's title.
URL	Enter the article's URL.
Image URL	If there is an accompanying image, enter its URL. This is required for Top Stories.

Date Article will be Published	Enter the date when the article will be published, or click the calendar icon and select a date.
Date Article will be Removed	Enter the date when the article will be removed from the publication, or click the calendar icon and select a date.

Choose News Section(s)

Select	Select the publication and news section where the article is to appear.
Publication Title	Displays the available publication titles.
Section Title	Displays the available section titles.

Choose Viewer Role(s)

Select	Select the viewer roles that will be allowed to view the article.
Role Name	Displays the available role names. The list of roles displayed matches the list entered under Viewing Sections Assigned to Publishers.

Entering the Free-Form Text

If you selected **Free-Form Text** for the Article field, the Articles page displays a window into which you can paste the article content from a text file or an HTML file. The **HTML Area** field appears in place of the **URL** field shown in the previous page shot.

HTML Area	Enter the article and its HTML coding.

Any article that you publish in the Top Stories section will appear in its own pagelet. The user can choose to view the pagelet by navigating to the Personalize Content page from the homepage and selecting Top Stories under News Categories.

The article is now available to the content publisher for review, and has a *Pending* status.

Reviewing Articles and Assigning Status

Usage	Use the Manage Articles page to assign statuses to articles.
Object Name	EO_PE_CON_PUB
Navigation	**Home, Menu, Portal Administration, Pagelet Administration, Company News, Manage Articles**

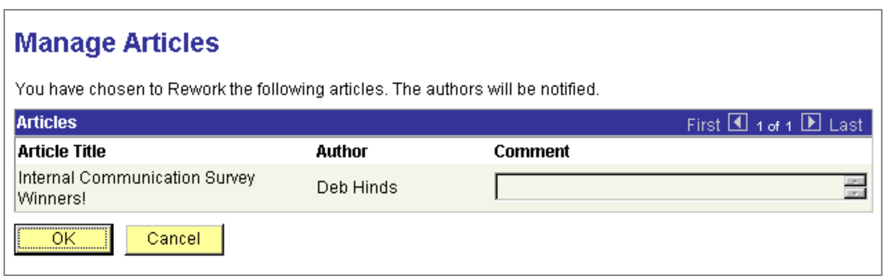
Manage Articles page

Filter By	Select a filter by method for filtering the articles list by Publish Status. Selections are: ***All, Pending, Publish, Rework.***
Sort By	Select a method for sorting the articles list. Selections are: ***Author, Publish Dt, Section, Status, Title.***
Fetch	Click to display the article list according to the selected filter and sort selections.
Select	Select the check boxes of the articles to be assigned a status.
Section Title	Displays the section the article is assigned.
Article Title	Displays the title of the article. Use the search icon to view the article.
Author	Displays the article's author.
Publish Status	The article's current status. All new articles have a ***Pending*** status. Articles that will be viewed by users have a ***Publish*** status. Articles that are being changed by their authors have a ***Rework*** status.
Date Article will be Published	The date of the first day the article will appear on the Company News pagelet.

Publish	Click this button to give the selected articles a status of *Publish.* A confirmation page associated with the status will appear.
Remove	Click this button to give the selected articles a status of *Remove.* A confirmation page associated with the status will appear. The author will be notified by email that the article has been rejected.
Rework	Click this button to give the selected articles a status of *Rework.* A confirmation page associated with the status will appear. The author will be notified by email so that changes can be made and the article resubmitted.

Managing Articles Page

Usage	Use the Managing Articles page to enter comments to include in the notification email sent to those authors who must rework their articles.
Object Name	EO_PE_CONPUB_CNF
Navigation	Click the Rework button on the Manage Articles page.



Manage Articles page

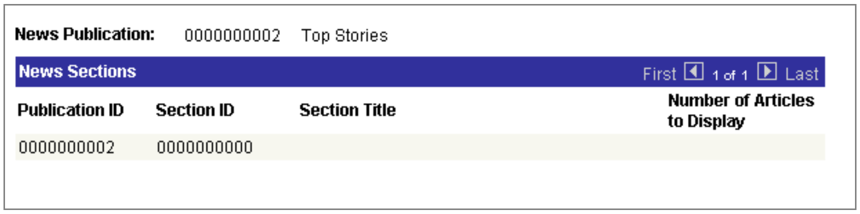
Articles

Article Title	Displays the title of the article.
Author	Displays the name of the author.
Comment	Enter comments to be included in the notification email sent to the author. The email is sent after you click **OK.**

Viewing Required News Sections

Usage	Use the Required Sections page to view the list of the required news sections for each publication.
Object Name	EO_PE_USRREQ_CAT

Navigation	**Home, Portal Content, Administer Company News, Inquire, Required Sections**
Prerequisites	None
Access Requirements	Enter a Publication Title or a Publication ID.


News Publication: 0000000002 Top Stories

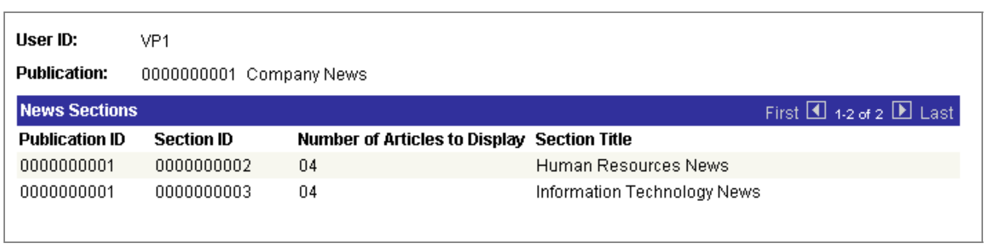
News Sections First 1 of 1 Last

Publication ID	Section ID	Section Title	Number of Articles to Display
0000000002	0000000000		

Required Sections page

Viewing User Preferences

Usage	Use the User News Preferences page to view user preferences for each user ID.
Object Name	EO_PE_USR_CAT
Navigation	**Home, Portal Content, Administer Company News, Inquire, User News Preferences**
Prerequisites	None
Access Requirements	Enter a Publication ID.


User ID: VP1

Publication: 0000000001 Company News

News Sections First 1-2 of 2 Last

Publication ID	Section ID	Number of Articles to Display	Section Title
0000000001	0000000002	04	Human Resources News
0000000001	0000000003	04	Information Technology News

User News Preferences page

User ID Displays the user ID.

Publication Displays the publication ID and title.

News Sections

Publication ID	Displays the publication ID.
Section ID	Displays the section ID.
Number of Articles to Display	Displays the number of articles displayed under the section title.
Section Title	Displays the section title.

Viewing Articles

The Company News pagelet displays titles of articles in a bulleted list; the titles are grouped according to their news category. Each title and category heading, such as Headline News, appears as a hyperlink. If you have permission, you can also submit news content by clicking the Submit Content link.

Company News pagelet

To view a news article:

1. Select an article from the list of titles.

   Either the text of the article appears, or the URL of the original source is used to display the full article.

2. Click a section title to display a page showing the articles included in that section.
3. Select an article from the list of titles.
4. Click Home or the browser Back button to return to the portal homepage.

Before you can use the Company News pagelet or the Top Stories pagelet, you must add them to your portal's homepage.

Personalizing the Company News Pagelet

Usage	Use the Personalize Company News page to select optional section titles, change the section titles' order of appearance, and set the number of articles to display.
Object Name	EO_PE_USR_PREF
Navigation	Click the Customize button (pencil icon) in the Company News pagelet's title bar.

Personalize Company News pagelet

Select Select the category titles that you want to appear in your homepage by selecting their check boxes.

Number of Articles to Display Select the number of articles to display for each news category. You may display up to five articles.

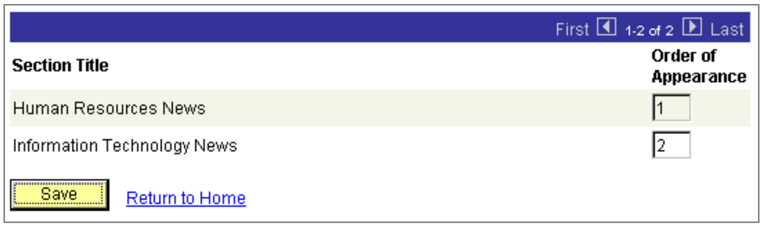
Note. The number selected applies to all non-required news sections within this publication.

Change Display Order Click this button to change the sections' order of appearance.

Save Click to save your settings.

Order Display Page

Usage	Use the Order Display page to set the order in which the section titles will appear.
Object Name	EO_PE_USRDSP_ORD_DD
Navigation	Click the Change Display Order button on the Personalize Company News pagelet.



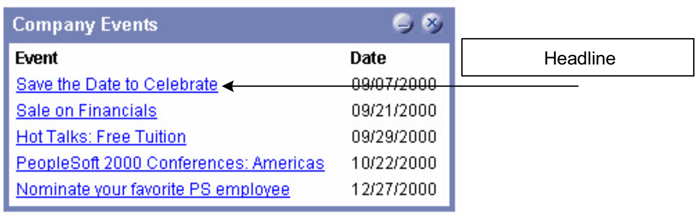
Order Display page

Order of Appearance	Enter a number in each text box to arrange the order of the section titles. The section title with the lowest number will appear first.
Save	Click to save your settings.

CHAPTER 6

Using the Company Events Pagelet

The Company Events pagelet displays a list of event articles. As the following screen illustration shows, titles of articles appear as links. The viewer clicks an article's title to read or print the article.



Company Events pagelet

This chapter describes, by user role, the tasks involved in creating a Company Events article, managing articles, and viewing articles. These are the user roles:

- content author
- content publisher
- component administrator
- content viewer

In contrast with the roles for the Company News pagelet, the component administrator and content publisher for the Company Events pagelet are assumed to be the same person.

Overview of Publication Process

The following is an overview of the tasks involved when you create, manage, and view a Company Events article:

1. The content author writes and submits the article.
2. The content publisher reviews and assigns a status to the article.

   Depending on its status, the article could require additional revisions, it could be accepted for publication, or it could be rejected.

3. Content viewers (company employees) who belong to the applicable viewer roles view the published headlines within the pagelet. When a viewer clicks on a headline, the article appears.

Setting Up Roles (Component Administrator)

Usage	For the component administrator, use the Maintain Roles List page to specify which roles may view Company News, Company Events, and External News. The component administrator specifies valid roles; content authors use this list to select who can view company events.
Object Name	EO_PE_ROLE_TBL
Navigation	**Home, Menu**, **Portal Administration**, **Pagelet Administration**, **Roles**
Prerequisites	If you have already performed this task for the Company News or External News pagelets, you only need to confirm that the list applies to Company Events.
Access Requirements	None

Maintain Roles List page

Role Name

Enter a role name in a blank **Role Name** field. You can also select from a list of role names:

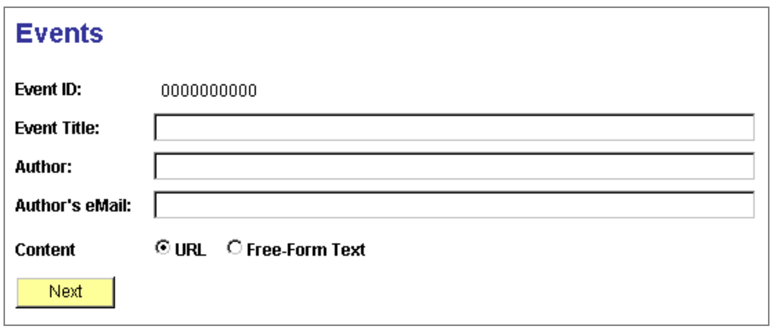
1. Click .

2. Click **Lookup** to display a list of names.

3. Click on a name in the list. You return to the Maintain Roles List page and the role name appears in the text box.

Preparing an Article for Submission and Assigning Viewer Roles (Content Author)

Usage	For the content author, use the Events page to create and submit articles and to assign viewer roles. Of course, prior to using this page, the content author has already written the article. Moreover, the article is in one of the following formats: text file, HTML file, or web page.
Object Name	EO_PE_EVT_TBL1
Navigation	**Home, Menu, Submit Portal Content, Company Events**
Prerequisites	None
Access Requirements	Click the Add a New Value link on the Company Events - Find an Existing Value page.



Events page

Event ID The ID of the event article, which is auto-generated.

Event Title Enter the title of the event.

Author Enter the author's name.

Author's email Enter the author's email address.

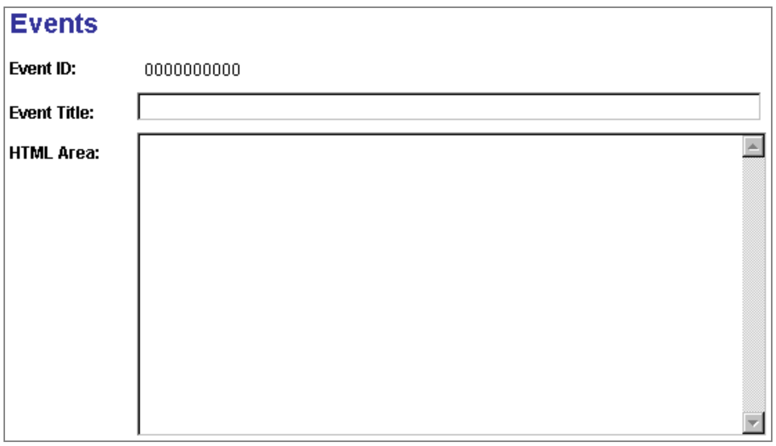
URL (Uniform Resource Locator) Select **URL** to display the article in the context of an originating web site.

Free-Form Text Select **Free Form Text** to supply the article text in free-form or HTML.

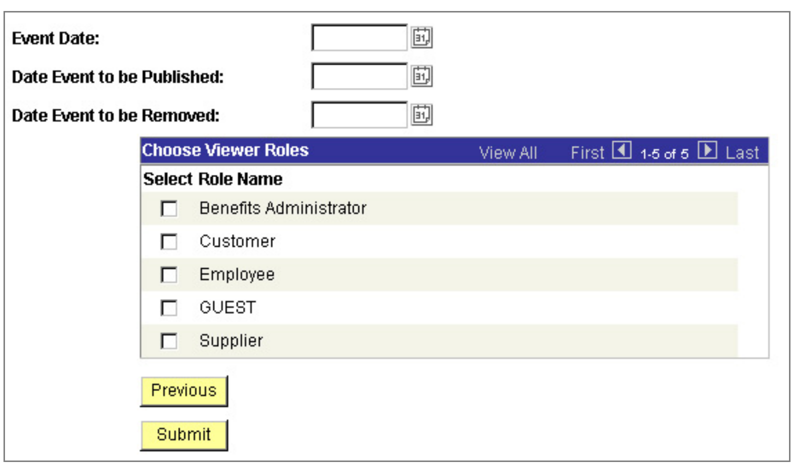
Click the **Next** button to continue to the Events Detail page.

Events Detail Page

Usage	Use the Events Detail page to provide the source URL or text of the article.
Object Name	EO_PE_EVT_TBL2
Navigation	Click the Next button on the Events page to access the Events Detail page.
Prerequisites	None
Access Requirements	None



Events Detail page (1 of 2)



Events Detail page (2 of 2)

If you selected *URL* in the Event page Content field, a text box appears for entering the URL. If you selected *Free-Form Text* for the Content, a larger text box appears into which you can paste the article content from a text file or an HTML file.

Event ID
The ID of the event article.

Event Title
The title is copied from the previous page (the Events page).

HTML Area or **URL**
If the **HTML Area** field appears, enter either the HTML code or the text of the article. Likewise, if the **URL** field appears, enter the URL of the article's original source.

To copy and place the HTML code or text of the article in the **HTML Area** field:

1. Open the source file.
2. Select the text, then copy it (Ctrl+C).
3. Return to the Article window.
4. Click the HTML Area window, then paste (Ctrl+V).

Event Date
Enter the date the event will occur, if applicable.

Date Event to be Published
Enter the article's publication date.

Date Event to be Removed
Enter the article's removal date.

Select Role Name
Select the viewer roles that will be allowed to view to the article.

Previous
Click the **Previous** button to access the Events page.

Submit
Click the **Submit** button to submit the article.

Reviewing Articles and Assigning Status (Content Publisher)

Usage	For the content publisher, use the Manage Events page to review articles, modify them if necessary, and to assign a status, such as *Published, Removed,* or *Reworked.*
Object Name	EO_PE_EVT_PUB
Navigation	**Home, Menu, Portal Administration, Pagelet Administration, Company Events, Manage Events**
Prerequisites	None
Access Requirements	None

Manage Events page

Filter By

Select one of the following values from the drop-down list box: ***All, Pending, Published, Rework.***

Sort By

Select one of the following values from the drop-down list box: ***Author, Event Dt*** (event date), ***Published Dt*** (published date), ***Status, Title.***

Click the **Fetch** button to list the articles according to the filter and sort values that you specified.

Select

Select this check box to select the associated event title.

Click to review the article. You may modify article attributes such as the text, dates, or the viewer roles. Click **Submit** to save the changes, and use the browser **Back** button to return to this page.

Event Date

Enter the date when the event will occur.

Click the **Calendar** button to display the calendar window. From the calendar window, you can select the date of the event.

Author

Enter the author's name.

Publish Status

Enter the article's current status. All new articles have a ***Pending*** status.

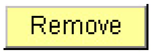
Date Event to be Published

Enter the publication date of the article.

Click the **Calendar** button to display the calendar window. From the calendar window, you can select the date of the article's publication.

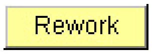
Click the **Publish** button to publish the article.

When you have changed the article's status to *Publish,* the article becomes available to viewers with the appropriate permissions.



Click the **Remove** button to remove the article.

When you have given the article the status of *Remove,* the author is notified by email that the article has been rejected. The article still remains in the database.

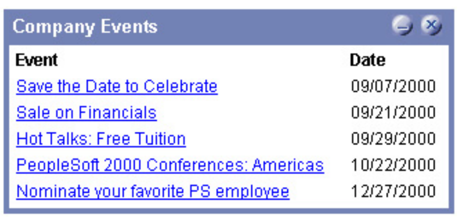


Click the **Rework** button if the article needs to be reworked.

When you mark an article with the status of *Rework,* the author is notified by email so that changes can be made and the article can be resubmitted.

Viewing Event Articles (Content Viewer)

As the following screen illustration shows, the Company Events pagelet appears on your portal homepage as a small box-like structure. It displays two columns: the headlines of event articles are listed in the first column; the event dates appear in the second column. Each headline appears as a link.



Event	Date
Save the Date to Celebrate	09/07/2000
Sale on Financials	09/21/2000
Hot Talks: Free Tuition	09/29/2000
PeopleSoft 2000 Conferences: Americas	10/22/2000
Nominate your favorite PS employee	12/27/2000

Company Events pagelet

To access an event article, click its headline. The text of the event article appears, or the system uses the URL of the original source display the article. The current window is replaced by the new content.

CHAPTER 7

Working With News Feeds From the Internet

PeopleSoft Portal Solutions serve as your starting point for news and information on a variety of topics. In fact, you can think of PeopleSoft Portal Solutions as one comprehensive mechanism for gathering content relevant to your business. In addition to accessing information within PeopleSoft, you can find news feeds from the most prestigious news sites on the internet. Whether you're curious about what's happening in your neighborhood or in some other part of the world, you should be able to find something that covers your interests.

PeopleSoft Portal Solutions provide a variety of news-related pagelets. These include:

- External News Pagelet: Displays headlines for a variety of news categories that you can personalize. Versions include:
  - Worldwide News (Moreover): Topics collected by Moreover.com from a host of websites.
  - Worldwide News (iSyndicate Express): Topics collected by iSyndicate from a host of websites.
  - External news pagelets configured by the portal administrator: The configuration is based on other custom news feeds. The portal administrator can expand the existing news pagelets or configure a new one. The configuration also includes support for subscription-based news services from content partners. For example, PeopleSoft has delivered internal integration with iSyndicate’s Network program. To configure the portal to work with this integration, the portal administrator must follow instructions described in the section Configuring iSyndicate Network.
- RSS News: Enables you to configure your own news pagelet based on RSS news feeds from many available internet sources.
- Project Management News: Summarizes regularly changing articles on project management techniques. Provided by ProjectConnections.com

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PeopleSoft cannot guarantee that content providers will continue to support the integration of internet content. PeopleSoft will support the integration as long as it has a solid partnership with a vendor. Moreover, the vendor content descriptions in this chapter are subject to change. Customers should check the vendor's website for the latest content descriptions.

This chapter is written for two audiences: the portal user and the system administrator. Most of the chapter contains information for the portal user—that is, anyone who is interested in learning about news feeds from the internet. The last section, Administrator's Tasks: Configuring News Feeds, discusses the implementation of external news and is intended for the portal administrator.

Personalization

You can personalize content from the internet in the same way that you personalize other parts of the portal homepage. You can do the following:

- Include or exclude content. For example, you can display stock quotes, headlines, and sports news on your homepage, but forego weather and business news.
- Control the layout of selected content. If you want ready access to business news and stock quotes, you can place them near the top of your homepage. Moreover, you can move sports news to another column or near the bottom of the page.
- Personalize the pagelet itself. Many news feeds are available, but you'll most likely want to view headlines from only a few sources on your homepage.

How the Portal Displays Content From the Internet

Content from the internet appears in the portal in the following ways:

- You click a link to view the content of another website. This is the click-through method. For example, when you click the link to a news story, you access the source's website, where the full article appears.
- A pagelet pulls content (such as stock quotes or weather) from another website, and the content appears on your homepage.

Content Providers of News Feeds

Two types of content providers supply news feeds:

- Content providers of free news feeds.
- Content providers of subscription-based news services.

Content Providers of Free News Feeds

The following table shows the content providers of free news feeds:

Content Provider	***Sample News Sources***	***Sample News Feeds***
Moreover	About.com, Bloomberg, Business Week, CBS MarketWatch, CNBC, CNN, ESPN, Excite, Financial Times, UPI, USA Today, Wall Street Journal	Aggregated across news sources: Top stories, Top business stories, Economics, Europe, Asia-Pacific, Transportation, Utilities, E-commerce, Telecomm., Sports: Golf, Arts & culture.
iSyndicate (Express Program)	About.com, FoxNews, Time, CNBC.com, PR Newswire, Business 2.0, UPI, US News, CNET, Wired News, CBS Sports Line	Divided by news source: Top news, US news, World news, Politics, eBusiness, Investing, Technology, Culture, Golf, Football.
Project Connections	Project Connections	Articles and tips on project management techniques.
Various websites that provide RSS-formatted news	Motley Fool, Wired, Stockcharts.com, Salon.com	Business, Finance, Technology, Reference, Arts, Lifesytles, Recreation, Shopping, and so on.

These content providers:

- Provide an out-of-the-box solution. PeopleSoft has created pagelets that access the large number of news feeds that these companies offer. You can select and view these news feeds without additional implementation.
- Provide free content. These news feeds are accessible using the click-through method and are free of charge.

Subscription-Based News Services

PeopleSoft has also teamed with content providers to offer subscription-based content. These providers offer advanced products and services not necessarily available from free sources, such as:

- Premium content from key sources such as Reuters.
- In-depth services such as customized news feeds. You may wish to provide particular users or groups with industry-focused topics.
- More control over look and feel. Content can be rendered in a manner consistent with the rest of your website. In addition, users need not see the banners and advertisements often associated with free news.
- More control over access. Your organization may not provide users with internet access. However, a content provider may allow for news to be downloaded to an internal server. As a result, information from the internet is nevertheless accessible.

The following table shows the available news sources:

Content Provider	***Notable News Sources***	***Other Content***
iSyndicate: Network Program	AP, News USA, Financial Times, Merrill Lynch, InfoSpace	Weather (AccuWeather), Stock quotes (Stockpoint), White & Yellow pages (InfoSpace), CityGuide (InfoSpace)

PeopleSoft is actively working to expand offerings so that you get the content you need to effectively run your business.

For more information about our content provider partners, refer to “Introducing the Content/Solution Providers”.

Viewing External News

In the following screen illustration, the name of the external news pagelet is Worldwide News and the content provider (as shown in parentheses) is Moreover. Individual news providers are separated into categories. Within each category, the most recent news headlines appear along with the news source.

An external news pagelet: Worldwide News

Each news category and each headline appears as a link. Click a headline to view the full article. The article appears on the original news source's website. Websites that require a subscription account are marked with . Websites that provide news for free but require a login or registration are marked with .

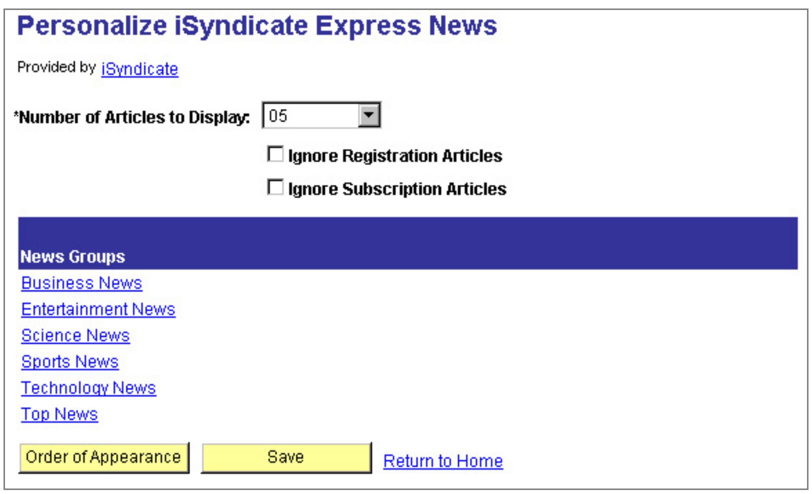
As the following screen illustration shows, when you click a news category, a page appears with the list of all news headlines within that category.

A news category page: Top stories

You can click each headline to view the full article.

Personalizing an External News Pagelet

Usage	Use an external news pagelet’s personalization page to select the news categories that you want to view. You can set the number of headlines that appear for each category. You can also select the news categories that you want to view.
Object Name	EO_PE_EXTNEWS_PREF
Navigation	Click the Customize button in the top bar of an external news pagelet.



Personalize iSyndicate Express News page

You can personalize the external news pagelets based on the two content providers, Moreover and iSyndicate. The sample personalization page shown is based on iSyndicate.

iSyndicate Click this link to access the iSyndicate website.

Number of Articles to Display From this drop-down list box, select one of the following values: ***01, 02, 03, 04, 05, 06, 07.*** The value that you select specifies the number of headlines to display for each category on the pagelet.

Ignore Registration Articles Select this field to hide headlines from any news source that requires user registration on its website.

Ignore Subscription Articles Select this field to hide headlines from any news source that is not free.

News Groups News categories have been collected into news groups for organization and easy access. Click a news group to view its list of categories. The categories within that news group appear.

Any category that has been added to the system in the last month is marked with a green star. A category that you have already activated has its **Active** check box selected. Select (or clear) the **Active** check boxes of any other categories that should be included in (or removed from) the pagelet.

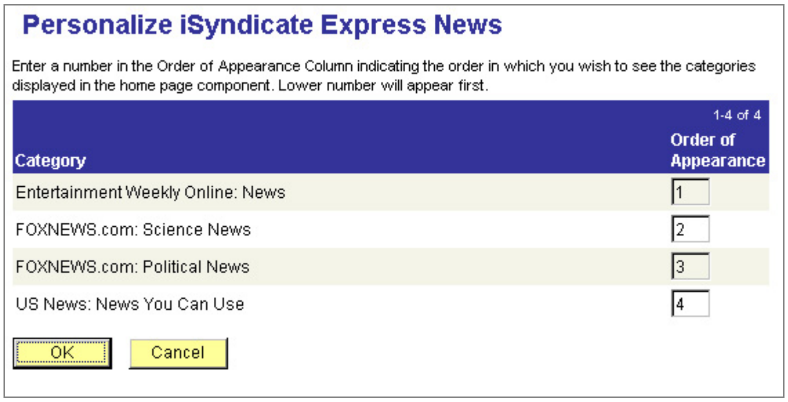
Click the **OK** button to return to the Personalize Worldwide News page.

Click the **Order of Appearance** button to access the page where you can specify the order in which categories appear.

Return to Home Click this link to return to your homepage.

Setting the Order of Categories

Usage	Use the Category Specification page of an external news pagelet to specify the order in which categories appear.
Object Name	EO_PE_EXTNEWS_ORDR
Navigation	Click the Order of Appearance button on the Personalization page to access this page, which has no distinguishing name.



A category specification page: Personalize iSyndicate Express News

Order of Appearance	Enter a number in each **Order of Appearance** field. The category with the lowest number will appear first.
	Click this button to return to the personalization page.
	Click this button to cancel your entries.

RSS News Pagelet

Rich Site Summary (RSS) is a pseudo-standard XML format that is suitable for listing news headlines. Developed by Netscape, it has been quickly adopted by other organizations that wish to provide users with a sampling of the content available on their website. It includes the following features:

- News feed title, a link back to the source website, and an optional image or logo.
- Headlines and links to the associated articles on the source website.
- Optional search capability against content on the source website.

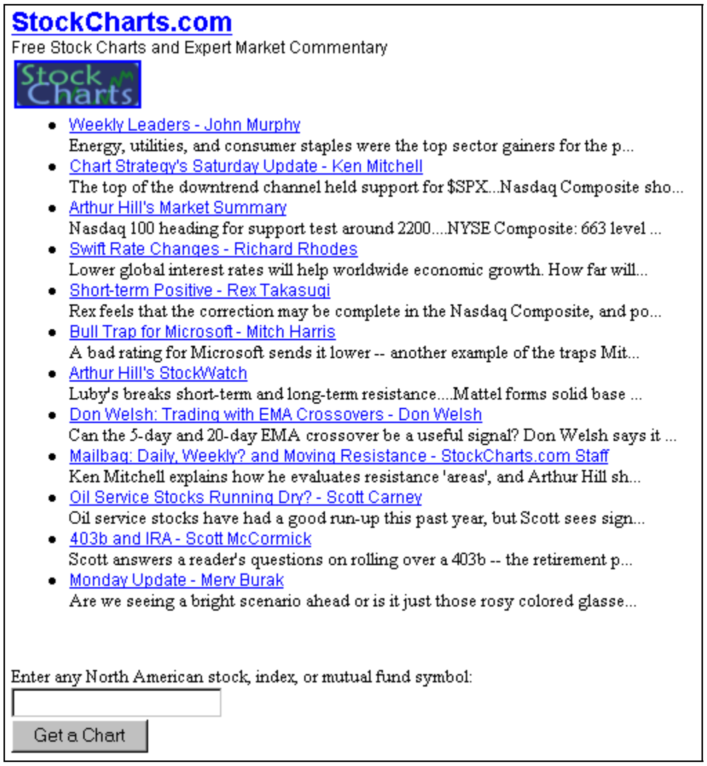
As shown in the following illustration, the RSS News pagelet is similar in appearance and function to the External News pagelet (which is typically titled "Worldwide News"). Individual news providers are separated into categories. Within each category, the most recent news headlines appear.

RSS News pagelet

Each news category and each headline appear as a link. Click a headline to view the full article. The article appears on the original news source website.

If a search capability is supplied by the source website, then you can enter keywords and click the button. The search results appear on the source website.

As the following screen illustration shows, when you click a news category, a page appears with the list of all the news headlines within that category. Because there is more space on the page for information than on the pagelet, any logo, article descriptions, and search box supplied by the RSS feed appear.



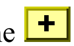
List of news headlines within a category

Click the title or image to access the source website. Click a headline to view the full article. The search box operates in the same manner as it does when it appears on the pagelet.

Personalizing the RSS News Pagelet

Usage	Use the RSS News pagelet's personalization page to specify pagelet options and the URLs for the news categories that you want to view.
Object Name	EO_PE_RSS_NEWS
Navigation	Click the Customize button in the top bar of the RSS News pagelet.

A personalization page: Personalize RSS News

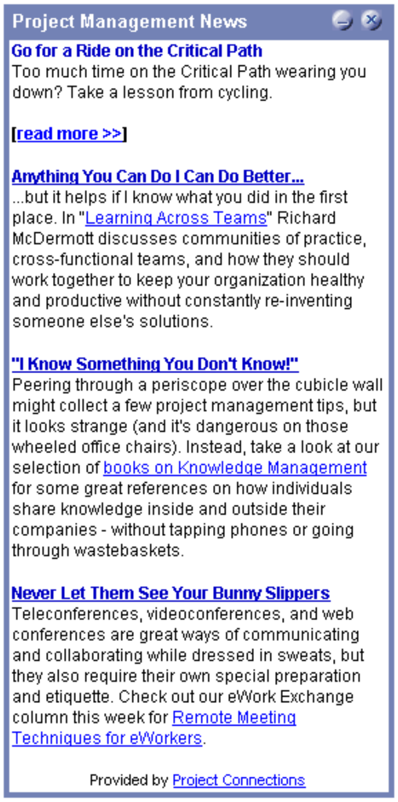
Number of Articles to Display	Specify the number of headlines to display for each category on the pagelet.
Display Article Summary	Select this check box to display any article summary in the pagelet. Note that this will increase the height of the pagelet. If this check box is clear, any supplied article summary will appear under the pointer when the cursor hovers over the link.
Display Image	Select this check box to display an image or logo for the RSS feed, if any is supplied.
Display Searchbox if Present	Select this check box to display a search box, if any is supplied. This enables you to search for articles containing the specified keywords at the source website.
URL	In each **URL** field, enter the URL for the RSS news feed. You can specify more than one URL by clicking the  button.
	Click the **Save** button to save your preferences.
Return to Home	Click this link to return to your homepage.

Project Management News Pagelet

PeopleSoft has partnered with ProjectConnections.com to provide a valuable resource for project managers and team members. This pagelet enables them to learn new techniques for handling project challenges and avoiding typical problems.

The Project Management News pagelet displays the most recent articles from the ProjectConnections.com site. The articles are updated approximately once a week.

Click a headline or link to view the full article or other project management resources at the ProjectConnections.com site.



Project Management News pagelet

Administrator's Tasks: Configuring News Feeds

This section is for the system administrator. It discusses how to set up and configure news feeds and covers the following tasks:

1. Scheduling External News Feeds.
2. Adding a News Feed.
   a. Setting Up an External News Pagelet.
   b. Registering an External News Pagelet.
   c. Creating and Maintaining News Providers.
   d. Maintaining News Groups.
   e. Maintaining a News Category.
   f. Setting up Roles.
3. Maintaining External News.

4. Configuring iSyndicate Network.

   Because each company can subscribe to different news feeds from iSyndicate Network, it does not come pre-configured. Configuring iSyndicate Network outlines the steps necessary to configure your news feeds. Although similar to the process of adding a news feed, the configuration is specific to iSyndicate Network.

The delivered external news pagelet is pre-configured to gather free content from partners such as Moreover.com and iSyndicate. Administrative setup involves running a batch program that gathers the news periodically (for example, on an hourly basis). In addition, PeopleSoft Portal Solutions offer features that assist each organization to customize news feeds and integrate subscription-based news. For example, you can deactivate any new news categories gathered by the batch program if the news is not appropriate for your users. You can then view the categories and decide which ones should be made available to the rest of the organization. With this feature, you can also allow employees to see only business-related news by deactivating all consumer-related topics.

Additional features let you do the following tasks:

- Create custom news pagelets for specialized news feeds and distribution to selected groups. As a result, you can add customized news feeds about competitors and display them within an existing external news pagelet or within a newly created pagelet.
- Focus the audience on a specific news feed or category. For example, you can enable managers to view competitive intelligence.

Scheduling External News Feeds

PeopleSoft delivers most of the setup for free news providers such as Moreover and iSyndicate Express. The main administrative task that you need to perform so that users can access external news is to schedule a batch process to run. This process loads current news headlines. The load is necessary because news headlines are cached locally in the database. This prevents unnecessary trips to the news server and reduces network traffic.

External News Pagelet Setup Page

Usage	Use the External News Pagelet setup page to set up an external news pagelet.
Object Name	EO_PE_NEWSCOM_SET
Navigation	**Home, Menu, Portal Administration, Pagelet Administration, External News, Pagelets**
Prerequisites	None
Access Requirements	Click the Add a New Value link on the Find an Existing Value page. Enter a name in the Run Control ID field of the Add a New Value page. Then click the Add button.

Schedule News Feed page

Report Manager Click this link to access the Report Manager page.

For more information, refer to Using Report Manager in the *PeopleTools PeopleBook.*

Process Monitor Click this link to access the Process Monitor page.

For more information, refer to Process Monitor in the *PeopleTools PeopleBook.*

Click the **Run/Schedule** button to activate the process. (The Process Request page appears.)

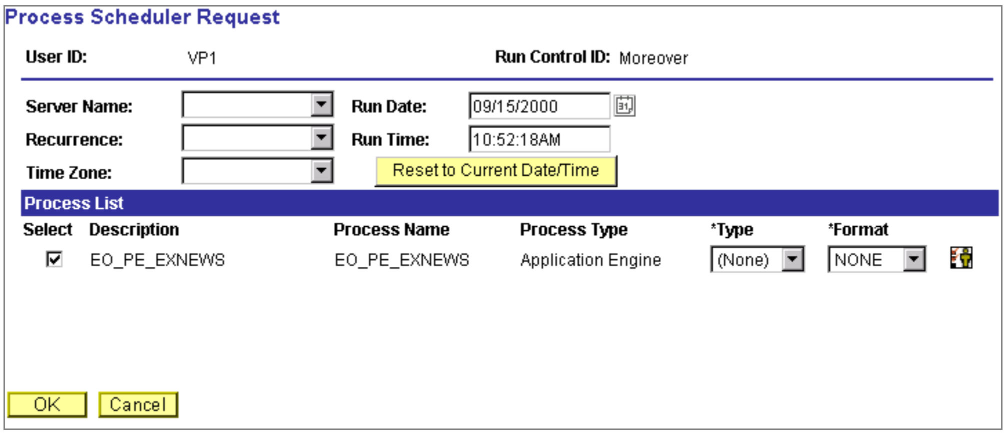
Provider In each **Provider** field, use the drop-down list box to select a news provider. Selecting a provider (defined on the News Provider Maintenance page) will associate this process with loading news from the provider Query URL(s) previously defined. For the content provider Moreover, you need to select only ***Moreover.***

You can select more than one provider by clicking the + button. For iSyndicate Express, PeopleSoft has predefined several news providers, such as ***iSyndicate Express Top News 1, iSyndicate Express Top News 2,*** and ***iSyndicate Express Business 1.*** You should add all names that begin with "iSyndicate Express".

Save Click the **Save** button to save this process definition.

Process Scheduler Request Page

Usage	Use the Process Scheduler Request page to specify parameters for how a process should run.
Object Name	PRCSRQSTDLG
Access Requirements	Click the Run/Schedule button on the Schedule News Feed page.



Process Scheduler Request page

Your user ID and the run control ID that you specified appear at the top of the page. You can now specify the parameters of how this process should run.

The Process Scheduler Request page is discussed extensively in the *PeopleSoft Cube Manager PeopleBook:* For more information, refer to Setting Up Process Scheduler.

Server Name Select the server where the process should run.

Recurrence If you want to schedule the process to run periodically, select the frequency. We recommend that you run the process ***Hourly.***

Run Date Enter the date on which you want the process to run, or click the **Calendar** button to select a date.

Run Time Enter the time at which you want the process to run.

Reset to Current Date/Time Click the **Reset to Current Date/Time** button to initiate the process as soon as possible.

Process List

The **Description, Process Name, Process Type, Type,** and **Format** appear already populated with information from the Schedule News Feed page.

Select	Make sure that the **Select** check box is selected. Otherwise, the Application Engine program that loads the data will not run.
OK	Click the **OK** button to save the settings and schedule the process to run. The Schedule News Feed page appears.
Cancel	Click the **Cancel** button to cancel the process run.

To view the status of the process, click the Process Monitor link on the Schedule News Feed page.

Setting Up an External News Pagelet

Although PeopleSoft delivers free news feeds from Moreover and iSyndicate Express that are already configured, you may want to add a news feed or create a customized external news pagelet. The steps for both tasks are similar, and the following sections describe them.

Overview

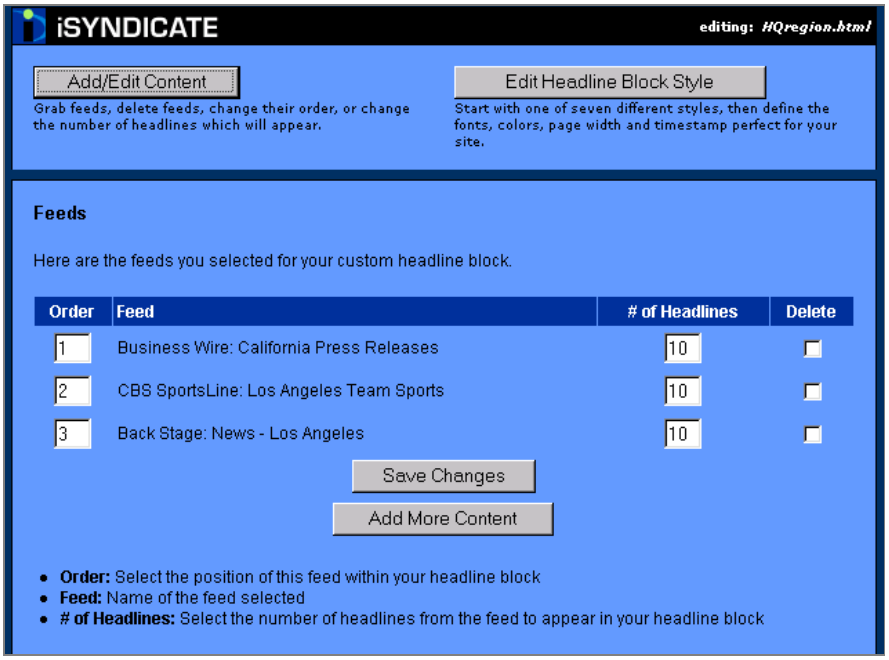
In the following sections, we show an example of how to create your own external news pagelet. No software development is required; you simply need to set up the proper information on the external news administrative pages. Let’s assume that you have a free account at iSyndicate Express and you'd like to create a dedicated pagelet for regional news not preconfigured by PeopleSoft. The first thing that you need to do is to create a headline block using iSyndicate's Headline Manager page.

Accessing iSyndicate's Headline Manager Page

To access the Headline Manager page:

1. Launch your browser and access the iSyndicate Express website (http://affiliate.isyndicate.com).
2. Log on to an existing iSyndicate Express account or create a new one by filling out the online form.

   Follow the online instructions to complete the form.
3. Click the Headline Manager link to create or edit a headline block.
4. Click the Add/Edit Content button to access the following page:



iSyndicate page

Creating a Headline Block

Let’s say that your organization headquarters is located in Los Angeles, California. You create a headline block called “HQregion.html” and select news that is related to that region. When selecting news feeds to populate this block, you must ensure that you've set the number of headlines for each feed to 10 (the maximum).

When you select the URL that you will use to access this headline block, it’s best to select iSyndicate’s XML format. In this case, the format would be something like the following: http://headlines.isyndicate.com/pages/<myAccount>/HQregion.xml.

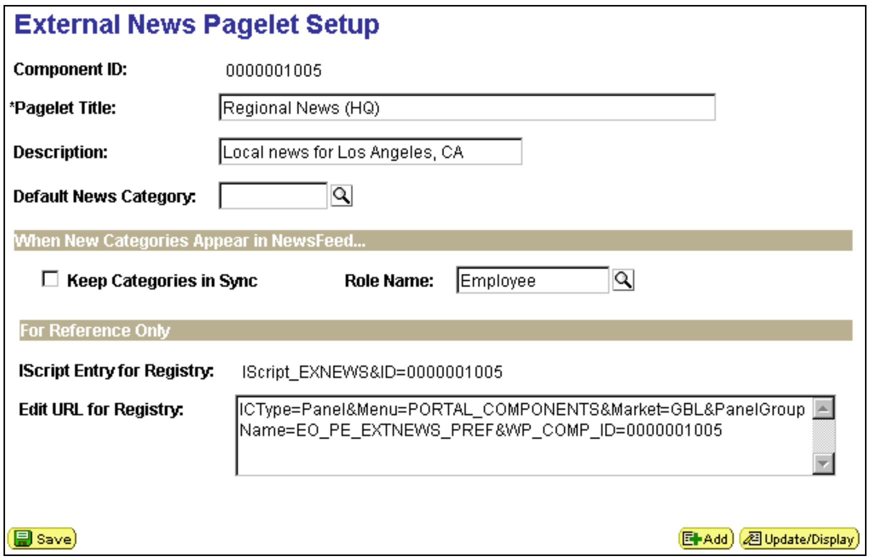
Creating and Maintaining an External News Pagelet

If you want to create a new external news pagelet with its own news groups and categories, you need to define some high-level information for the external news pagelet. In our example of creating a news feed for regional news, the content is provided by iSyndicate Express. Because there is already a pagelet that is dedicated to that company, you could add your news feed to that pagelet.

However, if you wish to create a dedicated pagelet, you should define the information on the External News Pagelet Setup page. You then use its ID number as you continue through subsequent administrative pages. This associates the data that you provide on all the following pages with this instance of the pagelet.

External News Pagelet Setup Page

Usage	Use the External News Pagelet Setup page to set up an external news pagelet.
Object Name	EO_PE_NEWSCOM_SET
Navigation	**Home, Menu, Portal Administration, Pagelet Administration, External News, Pagelets**



External News Pagelet Setup page

The **Component ID** appears at the top of the page.

Pagelet Title	Enter the title of the publication. You must apply this name when you register the pagelet in the portal registry.
Description	Enter a description for the publication title.
Default News Category	Enter the code for the default news category that users will see when no preference has been set. You cannot select a code until the categories for this pagelet are defined, which you'll do later in the process. You then must return to this page and specify the code for the default news category.

When New Categories Appear in NewsFeed

The fields in this group box apply to news that is loaded through the batch process.

Keep Categories in Sync	Select or clear this check box. Your setting specifies whether new categories loaded by the batch process are ignored or stored in the database. Because Moreover is the only content provider that provides this information automatically, this check box should usually be clear.
Role Name	Use this drop-down list box to select the default role name that should be associated with new categories loaded automatically by the batch process. Currently, only Moreover provides this information automatically, so this field can be left blank.

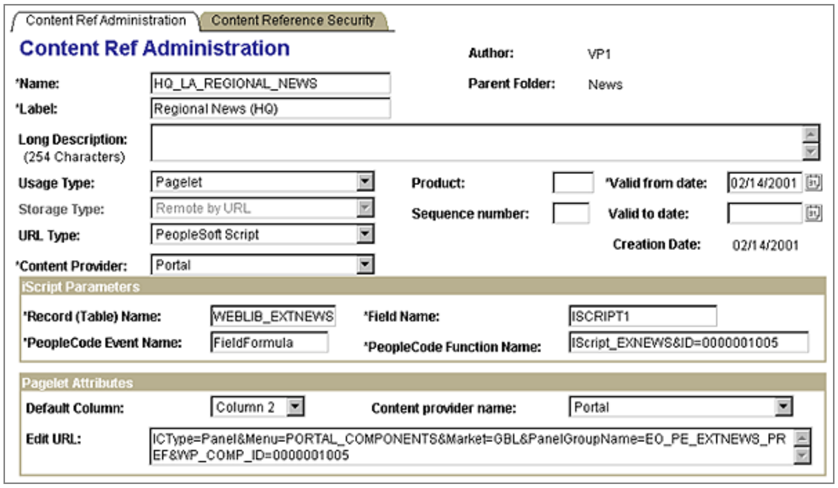
For Reference Only

In this group box, information about the registry appears after you click the **Save** button. This is provided so that you can more easily copy and paste the information when you register the pagelet in the portal registry.

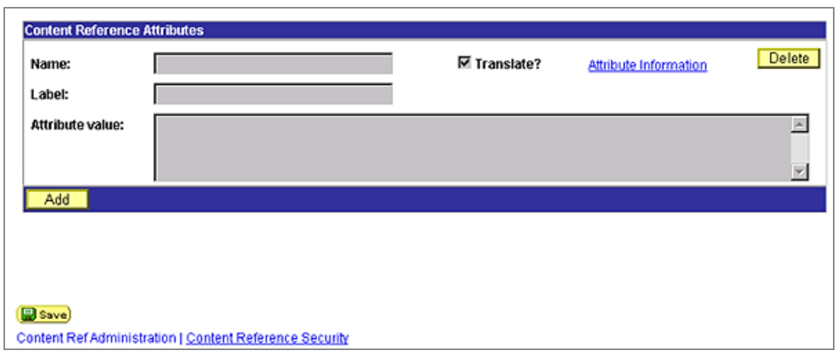
IScript Entry for Registry	The IScript entry is auto-generated. Enter this value in the PeopleCode Function Name field.
Edit URL for Registry	The Edit URL entry is auto-generated. Enter this value in the Edit URL field.

Registering a Separate External News Pagelet

Usage	Use the Content Reference Administration page to register a pagelet. (The content administrator completes entries and selections on the Content Reference Administration page to register a publication.)
Object Name	PORTAL_CREF_ADM
Navigation	**Home, Menu, Portal Administration, Structure and Content, Base Portal Data, Pagelets, News, Add Content Reference**
Prerequisites	Define an external news pagelet and know the component ID.
Access Requirements	None



Content Reference Administration page (1 of 2)



Content Reference Administration page (2 of 2)

After you have created the external news pagelet information, the new pagelet needs to be registered in the portal. You'll recall that in our example of creating a news feed for regional news, the content is provided by iSyndicate Express. Because there is already a pagelet that is dedicated to that company, you could add your news feed to that pagelet. Therefore, in this case, you would not need to register a pagelet.

Name	Enter a unique name for the pagelet. It should be all uppercase letters where words are separated by an underscore character.
Label	Enter the name of the publication. We recommend that you enter the same title that you specified on the External News Pagelet Setup page.
Long Description	Enter a description of the publication. Optional entry.
Usage Type	Click the drop down arrow, select ***Pagelet,*** and then wait for the page to refresh.

Product	Leave blank.
Valid from date	This field defaults to today's date. You can enter a future date for the pagelet registry to begin, or click the calendar button to select a date.
Storage Type	No entry required.
Sequence Number	This is an optional entry to specify in what order this pagelet selection appears on the Personalize Content page.
Valid to date	Enter the last day for the pagelet to be registered, or click the calendar button to select a date.
URL Type	Click the drop down arrow, select ***PeopleSoft Script,*** and then wait for the page to refresh.
Content Provider	Click the drop down arrow, and then select ***Portal.***

iScript Parameters

Record (Table) Name	Enter WEBLIB_EXTNEWS.
Field Name	Enter ISCRIPT1.
PeopleCode Event Name	Enter FieldFormula.
PeopleCode Function Name	Enter IScript_EXNEWS&ID=##########.

Note. ########## is the component ID assigned when the external news pagelet was created.

Pagelet Attributes

Default Column	Click the drop down arrow, and then select ***Column 2,*** or whichever column you prefer.
Content provider name	Click the drop down arrow, and then select ***Portal.***
Edit URL	Enter the following:

ICType=Panel&Menu=PORTAL_COMPONENTS&Market=GBL&PanelGroupName=EO_PE_EXTNEWS_PREF&WP_COMP_ID=##########.

Note. ########## is the external news pagelet component ID.

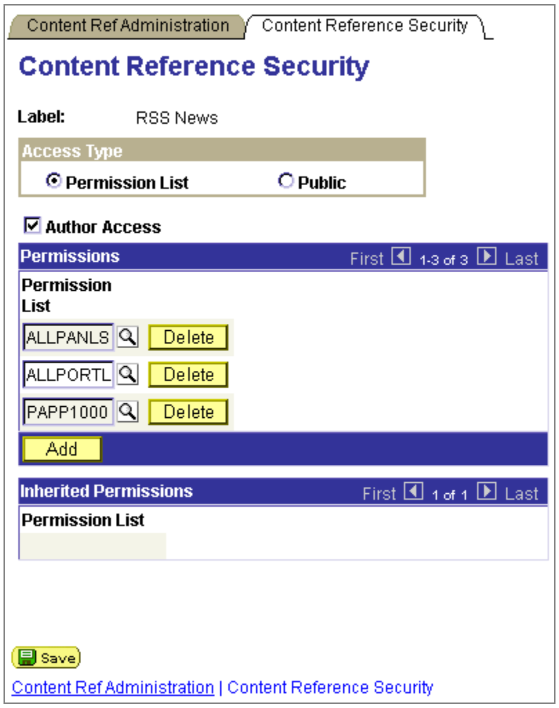
Content Reference Attributes

Attribute name	Leave blank.
Attribute value	Leave blank.

The next step is to set the pagelet security. Complete the steps outlined in the following section, Setting Security.

Setting Security

Usage	Use the Content Reference Security page for public viewing.
Object Name	PORTAL_CREF_SEC
Navigation	**Home, Menu, Portal Administration, Structure and Content, Base Portal Data, Pagelets, News.** The Content Reference page appears, and the name of the pagelet appears in the Label field. Click the Edit link that corresponds to your pagelet: the Content Ref Administration page appears. Click the Content Reference Security tab.
Prerequisites	None
Access Requirements	None



Content Reference Security page

The **Save** button appears only when you select **Public** in the **Access Type** group box.

Access Type	Select **Public.** If you want to restrict access to certain users, select **Permission List.** Then specify the appropriate permission lists in the **Permissions** group box. Click the **Add** button to add more than one permission list.
Author Access	Select this check box if the author will have access to the pagelet.

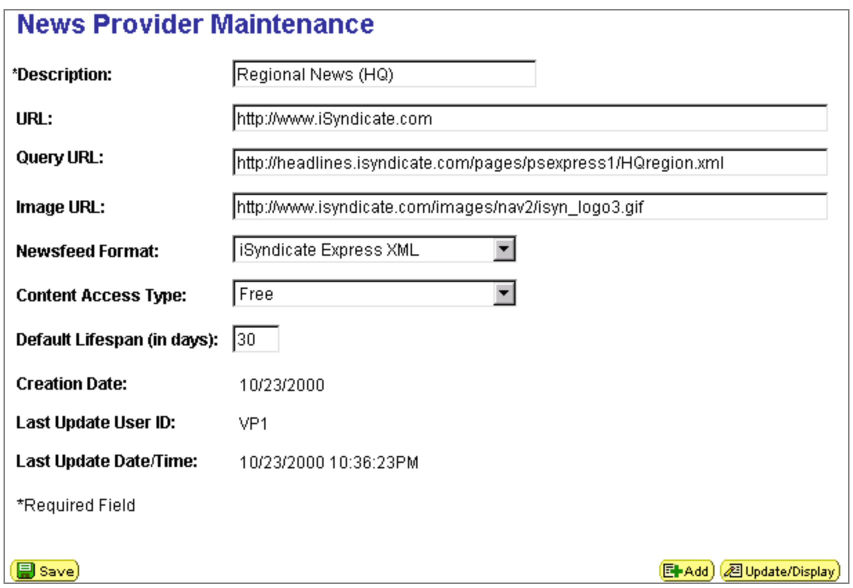
Creating and Maintaining News Providers

When you access web-based news feeds, you must enter information about the news provider, such as its name, website, and so on. You use the News Provider Maintenance page to log this information.

We use the term "provider" to refer not only to the company but to the URL that will be used to access the news. We make this distinction because a company, such as iSyndicate, may have different URLs to access different news feeds. In fact, this mechanism is used for the preconfigured data for iSyndicate Express, where there are dozens of different URLs used for various topical news feeds.

News Provider Maintenance Page

Usage	Use the News Provider Maintenance page to maintain data for a news provider. This essentially corresponds to a unique URL used to retrieve the news feed.
Object Name	EO_PE_PROV_PG
Navigation	**Home, Menu, Portal Administration, Pagelet Administration, External News, Providers**
Prerequisites	None
Access Requirements	Click the Add a New Value link on the News Providers Find an Existing Value page.



News Provider Maintenance page

Description Enter the name or description of the news provider.

URL Enter the URL for the homepage of the source website. This URL will be used to display a link.

Query URL Enter the URL given by the source website to retrieve data for this news feed.

Image URL	Enter a URL for a logo or image to display for the source website.
Newsfeed Format	Select the value of the newsfeed format from the available options: ***Moreover XML, RSS/XML, Unknown,*** or ***iSyndicate Express XML.*** This value will be used by the Application Engine (AE) loading process to determine how to parse the data.
Content Access Type	Select the type of content access from the available options: ***Company Subscription, Free, Registration required,*** or ***User Subscription.*** Selecting one of the other options will allow you to enter a **User ID** and **Password.**
Default Lifespan (in days)	Enter the number of days that most articles will be valid. After the specified time, articles may be purged from the database. Note that individual articles may override this entry. The recommended life span is 30 days.
Creation Date	An auto-generated field that displays when the news provider entry was created. This field is provided for reference.
Last Update User ID	An auto-generated field that displays the user ID of the last person who modified the record. This field is provided for reference.
Last Update Date/Time	An auto-generated field that displays the date and time of the last modification. This field is provided for reference.

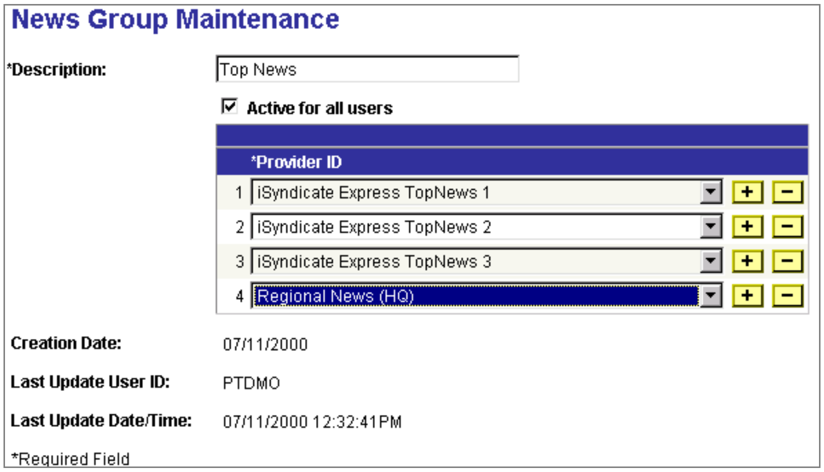
Maintaining News Groups

There are many available news categories that can be accessed by your pagelet. Having so many choices can be daunting, especially when you are personalizing your category selections for the pagelet. To make this easier, we have added an organizational layer called “news groups” on top of categories.

When you create a new pagelet, you need to define the high-level groups that will be used to classify the categories. For example, you may want to create a few broad groups, such as Top News, Business, and Lifestyles. On the other hand, you may want to create more groups by breaking Lifestyles into Entertainment, Sports, Travel, and so on.

News Group Maintenance Page

Usage	Use the News Group Maintenance page to maintain data for news groups.
Object Name	EO_PE_NEWSGROUP_PG
Navigation	**Home, Menu, Portal Administration, Pagelet Administration, External News, Groups**



News Group Maintenance page

Description — Enter the name for the news group. This will be displayed on the pagelet's personalization page.

Active for all users — Generally, you can leave this check box selected. It allows you to disable user access to all categories within a news group. For example, if you don't want employees to see Lifestyle-type news, you could clear this check box here rather than in each individual category.

Provider ID — Select the appropriate provider(s) associated with this news group. Essentially, this associates the applicable query URLs with this news group.

Creation Date — The Creation Date is auto-generated and provided for reference.

Last Update User ID — An auto-generated field that displays the user ID of the last person who modified the record. This field is provided for reference.

Last Update Date/Time — An auto-generated field that displays the date and time of the last modification. This field is provided for reference.

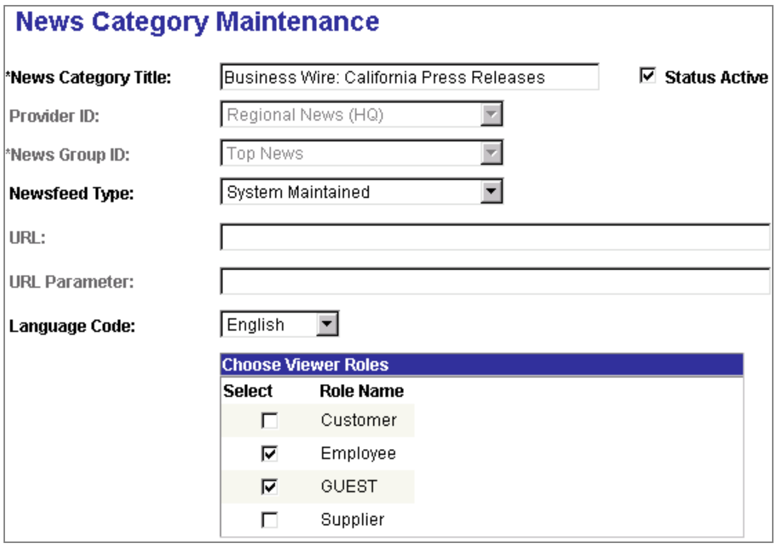
Maintaining a News Category

The final step in setting up a new web-based news feed is to assign the category or categories that are loaded. You use the News Category Maintenance page to define the name and associate the category with a news provider (primarily for its Query URL) and with a news group previously configured. You will not need to set up data for articles, because those will be loaded when you run the process discussed in Scheduling External News Feeds.

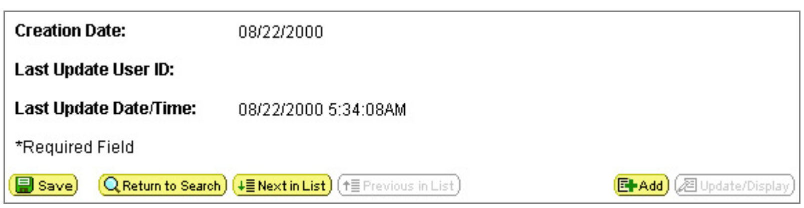
When you define the news category, you can also specify the user roles that will have permission to view the category and its articles. For example, the number of employees who will access the news category may be charged a subscription fee for news about competitors. You can restrict this subscription to executives or to the marketing department.

News Category Maintenance Page

Usage	Use the News Category Maintenance page to maintain data for news categories appearing in the external news pagelet.
Object Name	EO_PE_CATEG_PG
Navigation	**Home, Menu, Portal Administration, Pagelet Administration, External News, Categories**



News Category Maintenance page (1 of 2)



News Category Maintenance page (2 of 2)

News Category Title Enter the name of the news category. For some news providers (such as iSyndicate Express), the name must exactly match the name that the provider uses.

Status Active Select this check box if the news category is active.

Provider ID Select the associated news provider (that is, the URL used to download the news).

News Group ID Select the associated news group under which the user should see this category when personalizing the pagelet.

Newsfeed Type	Select one of the following methods used to load the news category***: Direct Download, SQL Server to XML Load,*** or ***System Maintained.*** The delivered categories from Moreover and iSyndicate Express are set to ***System Maintained*** because an Application Engine program will download and cache articles.
URL	Enter a URL in this field. With this entry, you specify a URL that overrides the one provided in the news provider. This field is optional.
URL Parameter	With this entry, you specify a URL that can be appended to the query URL provided in the news provider. This field is optional.
Language Code	Select the language for the news category.
Choose Viewer Roles	Select the check boxes for the appropriate roles that will have permission to view the news category. Users who do not belong to any selected role will not be able to access the category in the personalization page or view the articles within this category. (The list is a subset of all PeopleSoft roles, defined on the Maintain Roles List page. To access this page, select Homepage, Portal Administration, Pagelet Administration, Roles.)
Creation Date	Displays the date the news category was created. This field is provided for reference.
Last Update User ID	Displays the user ID of the last person who modified the record. This field is provided for reference.
Last Update Date/Time	Displays the date and time of the last modification. This field is provided for reference.

Setting up Roles

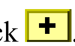
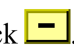
Usage	Use the Maintain Roles List to specify which roles may view Company News, Company Events, and External News. (The administrator specifies valid roles from which authors, who will be able to view external content, will select.)
Object Name	EO_PE_ROLE_TBL
Navigation	**Home, Menu**, **Portal Administration**, **Pagelet Administration**, **Roles**

Maintain Roles List page

Role Name

Enter a role name in a blank **Role Name** field, or select a role name.

To select from a list of role names:

1. Click .
2. Click **Lookup** to display a list of names.
3. Click on a name in the list. You return to the Maintain Roles List page and the role name appears in the field.
4. To add additional text boxes, click .
5. To delete a text box/role name, click .

Save

Click the **Save** button when you have specified all role names.

Maintaining External News

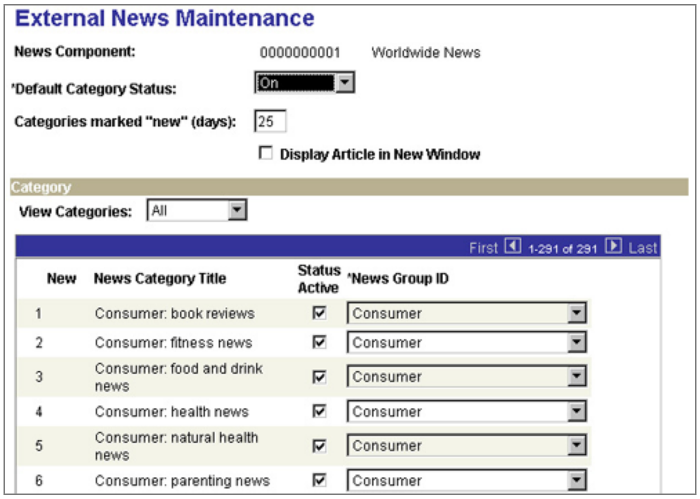
Use the External News Maintenance page to set some general options for the external news pagelet. For example, you can determine whether news articles should be displayed in the current browser window (the default) or within a new window.

Because there are typically many news categories, the External News Maintenance page also provides a central location for you to administer the news categories. You can view all categories or just those that have been imported automatically (for example, from Moreover). You can then determine if they are appropriate for your users.

External News Maintenance Page

Usage	Use the External News Maintenance page to set general options for external news and to administer multiple categories from one location.
Object Name	EO_PE_CATEG_ADMIN

Navigation	**Home, Menu, Portal Administration, Pagelet Administration, External News, Manage External News**
Prerequisites	None
Access Requirements	On the External News Admin Find an Existing Value page, select *Component ID* or *Pagelet Title* for your search criteria. Click the Search button. Depending on the search criteria you specified, click the Component ID link or the Pagelet Title link of your pagelet.



External News Maintenance page

News Component

This field displays the number and name of the external news pagelet that you are administering. To modify settings for another news pagelet, click the **Return to Search** button at the bottom of the page.

Default Category Status

This setting applies only to those news providers whose categories are automatically loaded (such as Moreover). The setting that you specify determines whether the default active status for new categories should be ***On*** or ***Off.*** You can then change them individually at a later time.

Categories marked "new" (days)

New categories are marked on the external news pagelet personalization page to assist the user in determining whether to activate them within the pagelet. Set the number of days that new categories should be marked.

Display Article in New Window

Select whether to have news articles appear in the same window (clear the check box) or in a new browser window (select the check box). The default (and recommended setting) is to have the news articles appear within the same window.

Category

View Categories	Use this drop-down list box to filter the list of categories shown. For example, you can view only categories that have been marked inactive or new.
New	Displays an icon if the category has been created within the number of days specified in the **Categories marked "new" (days)** field.
News Category Title	Displays the news category title.
Status Active	Select this check box to make news categories accessible to users. To make them inaccessible, clear the check box. This task can be done individually on the News Category Maintenance page.
News Group ID	Select values from this drop-down list box to modify the news group for a category. This task can be done individually on the News Category Maintenance page.

Configuring iSyndicate Network

This section describes the setup of iSyndicate Network news feeds. The iSyndicate Network program offers premium news content for a fee. It offers the following advantages over the free iSyndicate Express content, which is available out-of-the-box with the PeopleSoft Portal Solutions:

- High-quality content from key news sources such as UPI and the Associated Press (AP).
- Direct server load from iSyndicate. Organizations that restrict internet-access to employees can load the news onto one server, so employees can access news from an internal source.
- More control over the content. The output can be displayed with your own look and feel.

Rather than accessing the internet directly for each news feed and article, iSyndicate Network makes use of a utility called Internet Content Download Server (ICDS). This utility manages the downloading and formatting of news. Articles can then be accessed from a server within the organization firewall.

Overview: Setting Up iSyndicate Network

Setting up iSyndicate Network involves the following tasks:

1. Configuring ICDS.
2. Web-enabling the ICDS output directory.
3. Setting up an external news pagelet.
4. Adding News Providers.

5. Creating a news group.
6. Creating a news category.
7. Registering an external news pagelet.
8. Running the iSyndicate Network Feed.

Configuring ICDS

Follow the directions from iSyndicate to download, install, and configure the ICDS utility. For integration with PeopleSoft Portal Solutions, it's important to note the ICDS output directory that contains the headline/index and article files. This will be used during the setup.

There are some additional steps that are PeopleSoft-related. Specifically, you need to install files provided by PeopleSoft to facilitate the integration with ICDS. You will also configure a new external news pagelet to process and display iSyndicate Network. This configuration follows the steps described previously in this chapter and includes instructions specific to iSyndicate Network.

Installing ICDS

To install ICDS:

1. Download ICDS22 client from iSyndicate: http://www.isyndicate.com/icds.

   Login using the user ID and password supplied by iSyndicate for installation.

   Make sure that you download the appropriate version, using the WITH JVM download.

2. Run the appropriate install script. For Windows, use the install.exe file to install ICDS. For other platforms, follow the installation instructions of the ICDS client installation.

3. While you install ICDS, you'll be prompted to enter the ICDS user name and password. Use your company account provided by iSyndicate.

4. When the installation is complete, copy the file provided in your Portal Solutions installation into the ICDS22 directory structure:

   - Template.conf

   The file is located in <PS_HOME>\SCRIPTS.

5. Copy the following files provided in your Portal Solutions installation from <PS_HOME>\SCRIPTS into the ICDS22/template directory:

   - Jcds-template.conf
   - Jcds-headline.tmpl
   - Html-article.tmpl

6. Copy the file <PS_HOME>\SCRIPTS\ICDS.BAT to <PS_HOME>.

7. In the ICDS 2.2 directory, run the script or batch file called runtemplate. This activates the templates supplied by PeopleSoft for use with iSyndicate Network.

8. In the ICDS 2.2 directory, run the script or batch file called runicds. This loads the news from a server at iSyndicate. You will want to run this script periodically, such as twice per day.

   You should see the resulting articles in the output directory of the ICDS22 directory.

If you don't install ICDS22 into the default directory (C:/program files/icds22), you may not see the output directory. You'll then need to make the following modifications into the template.conf file:

<templateBlock outputFile="d:/program files/icds22/output/h/$feedId.xml"

<templateBlock outputFile="d:/program files/icds22/output/a/$feedId/$shortDate/$resourceId/index.html"

---

9. Web-enable the ICDS Output Directory. The portal will issue an HTTP request to load headlines and articles from ICDS. Therefore, the server where the ICDS resides must be web-enabled. It doesn't need to reside outside a corporate firewall. Essentially, a web server needs to be running on that machine, and the ICDS output directory must be web-accessible. If you are using the Apache web server, add the following line into the httpd.conf file. Usually, you can find this file in C:\Program Files\Apache Group\Apache\conf\httpd.conf:

   Alias /output/ "C:/Program files/icds22/output/"

   For example, let's assume you installed ICDS to the directory \Program Files\ICDS22. The output directory is usually \Program Files\ICDS22\output. If you are using the Apache web server, you could add an alias to the configuration file (which might be in \Program Files\Apache Group\Apache\conf\httpd.conf) such as:

```
#

# Aliases: Add here as many aliases as you need (with no limit).

# The format is: Alias fakename realname

#

# Note that if you include a trailing / on fakename then the

# server will require it to be present in the URL.  So "/icons"

# isn't aliased in this example, only "/icons/"..

#

Alias /icons/ "C:/Program Files/Apache Group/Apache/icons/"
```

```
Alias /output/ "C:/Program Files/ICDS22/output/"
```

10. Shut down the Apache server and restart.

Setting Up an External News Pagelet for iSyndicate Network

PeopleSoft delivers a pre-configured External News pagelet for iSyndicate Network. You can use this entry and modify values to suit your needs, or you can add other entries if you want to create more than one pagelet related to this provider.

To set up an external news pagelet for iSyndicate Network, use the External News Pagelet Setup page.

For more information about the External News Pagelet Setup page, refer to the section Setting Up an External News Pagelet.

You can modify some of the field values of the External News Pagelet Setup page:

Title	Currently, the convention is to give this the same name as the Label in the content reference, which is the name that appears in the pagelet title bar.
Default News Category	Although initially blank, this field should be set after you define news categories for iSyndicate Network. This is the news category that will appear before a user personalizes the pagelet.
Role Name	This is the default role for news categories that are automatically added. This doesn't apply to iSyndicate Network.

In the For Reference Only group box, information about the registry appears after you click the Save button. This is provided so that you can copy and paste the information when you register the pagelet in the portal registry.

You need to note the following fields:

Iscript Entry for Registry	The IScript entry is auto-generated. Enter this value in the PeopleCode Function Name field.
Edit URL for Registry	The Edit URL entry is auto-generated. Enter this value in the Edit URL field.

Adding News Providers

Setting up news providers for iSyndicate Network is similar to setting up news providers for other external news. This section covers information specific to iSyndicate Network.

To set up news providers, use the News Provider Maintenance page.

For more information about the News Provider Maintenance page, refer to the section News Provider Maintenance Page.

For iSyndicate Network, you need to modify the settings for the following fields:

Description	Enter the name or description of the news provider. Because there are pre-defined news providers for iSyndicate Express, it's best to note "ICDS" or "iSyndicate Network" in the description.
Query URL	Enter the URL given by the source website to retrieve headline data for this news feed. The first part of the URL will be the web-enabled ICDS output directory. Usually, headlines are stored in the "h" subdirectory.
Newsfeed Format	Select *iSyndicate Network XML*. This value will be used by the AE loading process to determine how to parse the data.
Content Access Type	Select *Company Subscription.*
Default Lifespan (in days)	The recommended life span is 30 days.

PeopleSoft delivers a pre-configured External News pagelet for iSyndicate Network. You can use this entry and modify values to suit your needs, or you can add other entries if you want to create more than one pagelet related to this provider.

Setting up an External News Group

Setting up an external news group for iSyndicate Network is similar to setting up news groups for other external news.

For more information about the News Group Maintenance page, refer to the section News Group Maintenance Page.

For the Provider ID field, select the appropriate provider(s) associated with iSyndicate Network that you want to include in this news group. Essentially, this associates the applicable query URLs with this news group.

Maintaining News Categories

To maintain news categories, use the News Category Maintenance page.

For more information about the News Category Maintenance page, refer to the section News Category Maintenance Page.

The following fields apply to iSyndicate Network:

News Category Title	Enter the name of the news category. The name must exactly match the name used in the headline index file for the <serviceName>. The headline index file is the one you specified in the News Provider page for the Query URL.
Provider ID	Select the associated news provider (that is, the URL used to download the news).
News Group ID	Select the associated news group in which the user should see this category when personalizing the pagelet.
Newsfeed Type	Select *System Maintained.* This means an Application Engine program will download and cache articles.

Content Reference Administration

Setting up a content reference for the pagelet that displays news from iSyndicate Network is similar to setting up a content reference for other external news.

To set up a content reference, you use the Content Ref Administration page. This section discusses the Content Ref Administration page in relation to the specific settings required for iSyndicate Network.

The Content Ref page is discussed extensively in the *PeopleTools Portal Technology PeopleBook:* For more information about this page, refer to the chapter Using Portal Administration Features.

The following fields apply to the set up of iSyndicate Network:

Name	Enter a unique name for this pagelet. This is a required field.
Label	Enter the label that you want to appear in the pagelet title bar, such as “iSyndicate Network News.”
Long Description	Enter iSyndicate Network.
Usage Type	Select *Pagelet* from the drop down list box.
URL Type	Select *Peoplesoft Script* from the drop down list box.
Content Provider	Select *Portal* from the drop down list box.

Record (table)name	Enter WEBLIB_EXTNEWS.
Field Name	Enter ISCRIPT1.
Peoplecode Event Name	Enter FieldFormula.
Peoplecode Function Name	Enter IScript_EXNEWS&ID=0000000003 if you are using the pre-defined pagelet entry for iSyndicate Network in the External News Setup page.
Content Provider Name	Select ***Portal*** from the drop down list box.
Edit URL	Enter ICType=Panel&Menu=PORTAL_COMPONENTS&Market=GBL&PanelGroupName=EO_PE_EXTNEWS_PREF&WP_COMP_ID=0000000003 if you are using the pre-defined pagelet entry for iSyndicate Network in the External News Setup page.

Click the Content Reference Security tab to specify the roles that have access to this pagelet. Your pricing structure with iSyndicate may require confining access to a particular group of users.

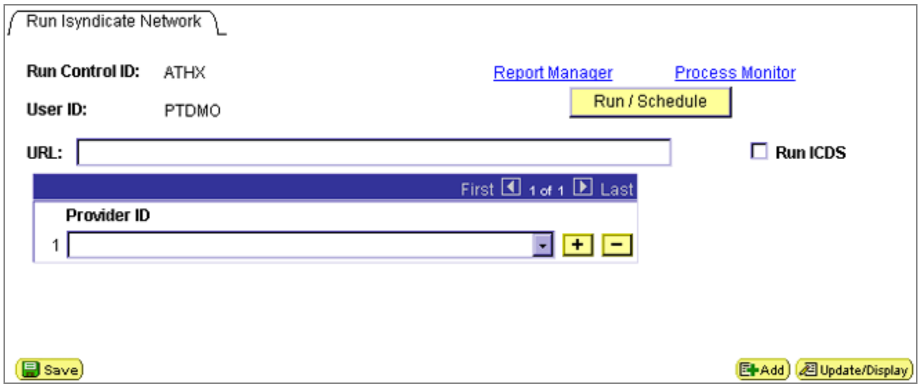
Running the iSyndicate Network Batch Process

Headline information is loaded using an Application Engine program. Caching this data prevents the system from accessing the ICDS server too often.

The Application Engine program used for iSyndicate Network differs from the program used for other external news pagelets. As a result, it uses a different page for scheduling the process.

The Run iSyndicate Network Page

Usage	You use the Run iSyndicate Network page to run a batch process to periodically load headline information.
Object Name	RUN_EO_PE_NETWR
Navigation	**Home, Menu, Portal Administration, Pagelet Administration, Pagelet Administration, External News, Run iSyndicate Network Feed**
Prerequisites	None
Access Requirements	Click the Add a New Value link on the Find an Existing Value page, enter a Run Control ID in the Run control ID field, and click the Add button.



Run Isyndicate Network page

The **Run Control ID** and **User ID** appear at the top of the page.

Report Manager Click this link to access Report Manager.

For more information, refer to Using Report Manager in the *PeopleTools PeopleBook.*

Process Monitor Click this link to access Process Monitor.

For more information, refer to Process Monitor in the *PeopleTools PeopleBook.*

Click the **Run/Schedule** button to run the process.

URL Enter the appropriate URL for the ICDS output directory. In the example shown previously, this would be http://icdsserver/output/. It must include the "http://" and "/" after the output directory, because other directories will be appended to this to construct a URL.

Run ICDS Select the **Run ICDS** check box if you would like to invoke ICDS from within the Application Engine program. If you are running ICDS using your own scheduling utility, then you should leave the checkbox clear.

Provider ID Select the ICDS-related Provider IDs from this drop-down list box. Click the  button to add as many Provider IDs as you have news feeds from iSyndicate Network.

CHAPTER 8

Using Content From the Internet

In addition to news headlines, PeopleSoft Portal Solutions provide a wide array of information from the internet. Depending on how you personalize your portal's homepage, you'll see content ranging from stock quotes and weather reports to entertainment and lifestyles. Of course, you could get such information independent of PeopleSoft Portal Solutions. Nevertheless, the inclusion of internet content provides you with more convenience and quick access to the information you need.

For more information about the content providers, refer to "Introducing the Content/Solution Providers".

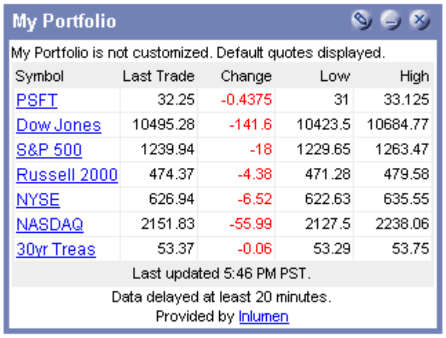
PeopleSoft cannot guarantee that content providers will continue to support the integration of internet content. PeopleSoft will support the integration as long as it has a solid partnership with a vendor. Moreover, the vendor content descriptions in this chapter are subject to change. Customers should check the vendor's website for the latest content descriptions.

Most of this chapter contains information for anyone who is interested in using content from the internet. However, the last three sections are intended for the portal administrator: these sections discuss how to setup specific pagelets (such as Weather Magnet) and how to create and register HTML-based pagelets.

My Portfolio

Peoplesoft Portal Solutions offer pagelets related to financial content. A popular type of financial content is stock quotes. Additional financial pagelets are available and described in Non-News Content from iSyndicate Express.

The following graphic shows the My Portfolio pagelet with content from Inlumen. As with many web-based stock quotes, the quotes are delayed at least 20 minutes due to Securities and Exchange Commission (SEC) regulations.



My Portfolio

My Portfolio is not customized. Default quotes displayed.

Symbol	Last Trade	Change	Low	High
PSFT	32.25	-0.4375	31	33.125
Dow Jones	10495.28	-141.6	10423.5	10684.77
S&P 500	1239.94	-18	1229.65	1263.47
Russell 2000	474.37	-4.38	471.28	479.58
NYSE	626.94	-6.52	622.63	635.55
NASDAQ	2151.83	-55.99	2127.5	2238.06
30yr Treas	53.37	-0.06	53.29	53.75

Last updated 5:46 PM PST.

Data delayed at least 20 minutes.
Provided by Inlumen

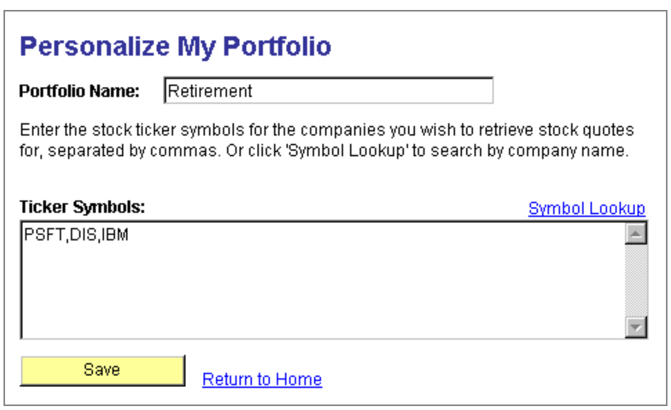
My Portfolio pagelet

The My Portfolio pagelet displays your stock quotes of choice and includes the price at which the stock was last traded, the change in price since the day's opening price, and the day's highest and lowest prices.

The default URL used to access Inlumen does not access all ticker symbols. For more information about how to activate full-featured data access, refer to the section Administrator's Task: Setting Up My Portfolio.

Personalize My Portfolio Page

Usage	Use the Personalize My Portfolio page to specify the stock quotes that appear.
Object Name	EO_PE_STOCK_PREF
Navigation	Click the Customize button in the top bar of the Stock Quotes pagelet.



Personalize My Portfolio page

Portfolio Name Optional. Enter the name to be displayed for your stock portfolio.

Ticker Symbols Enter the stock ticker symbols for which you'd like to retrieve stock quotes. Separate the ticker symbols with a comma.

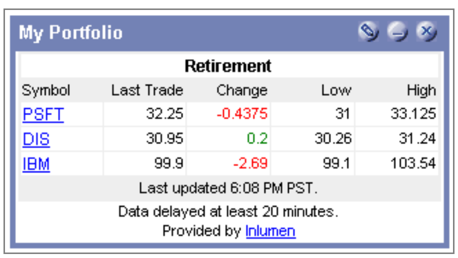
Symbol Lookup Click the **Symbol Lookup** link to search for a ticker symbol by company name.

Save Click the **Save** button to save your entries.

Return to Home Click the **Return to Home** link to return to your portal homepage.

Displaying Specific Stock Quotes

The following screen illustration shows the My Portfolio pagelet in its personalized version.



My Portfolio pagelet (personalized)

When you view your stock pagelet for the first time, default symbols appear. You can, of course, personalize the list of stock ticker symbols that you plan to monitor.

To personalize stock ticker symbols:

1. Click the Customize button in the top bar of the pagelet to access the My Portfolio page.

2. Enter the name of your stock portfolio in the Portfolio Name text box.

   The name of your portfolio will appear on the pagelet. You may also leave this field blank. The pagelet will automatically remove the space where the heading would otherwise reside.

3. Enter the ticker symbols in the text box, separated by commas.

   If you don't know the ticker symbols:

   a. Click the Symbol Lookup link to find the symbols by company name. This displays the Stock Symbol Lookup page.

b. Enter the name of the company that you wish to search for. You can also enter the first few letters of the name.

c. Click the Lookup button.

A list of symbols appears, sorted alphabetically by company name. If you don't see the symbol you're looking for, you can click the Previous or Next links at the bottom of the list to scroll through the search results list.

d. Click the ticker symbol of the company that you want to add to your portfolio.

You now return to the Personalize My Portfolio page, and the symbol is added in the Ticker Symbols field.

4. Click the Save button.

The Save Confirmation page appears.

5. Click the OK button to return to the homepage.

Accessing Stock Information

On the My Portfolio pagelet, you see the stock quotes that you have specified. You see the last traded price of the stocks, the change in price since the day's opening price, and the day's highest and lowest prices.

When you refresh the homepage, the system retrieves stock quotes only if they haven't been retrieved within the past fifteen minutes. Moreover, all time stamps, including the time listed at the bottom of the pagelet, reflect the server time, including the server's time zone.

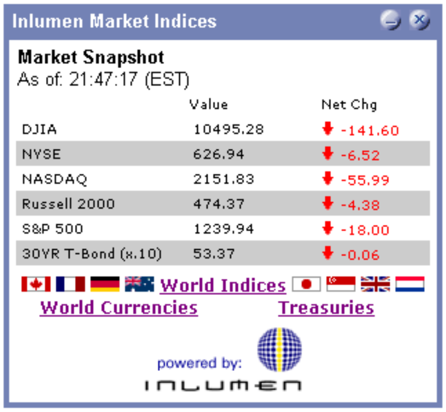
When you move the cursor over any stock symbol, the name of the company appears, along with the time the stock quote was last updated. In addition, when you click a symbol, you access a page that contains detailed information about the company's stock.

The More Detailed Stock Information link appears at the bottom of the page. When you click this link, you access the source's website, where you'll find additional information about the selected stock symbol.

Inlumen Market Indices Pagelet

The Inlumen Market Indices pagelet provides a summary of market activity. You can see key market indices at a glance. You can also use the links at the bottom of the pagelet to access other key information, such as:

- Market indices for other international exchanges.
- Currency exchange rates.
- Fixed income securities.



Inlumen Market Indices pagelet

Personalization is not available for this pagelet.

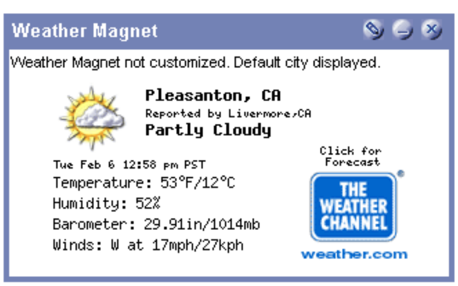
Weather Reports

At first glance, weather reports may not seem relevant to business. Nevertheless, they're useful to business travelers. The Weather.com Weather Magnet and AccuWeather provide weather reports for any domestic or international location.

Weather Magnet

Weather Magnet provides up-to-the-minute weather information from weather.com (The Weather Channel) right on your homepage.

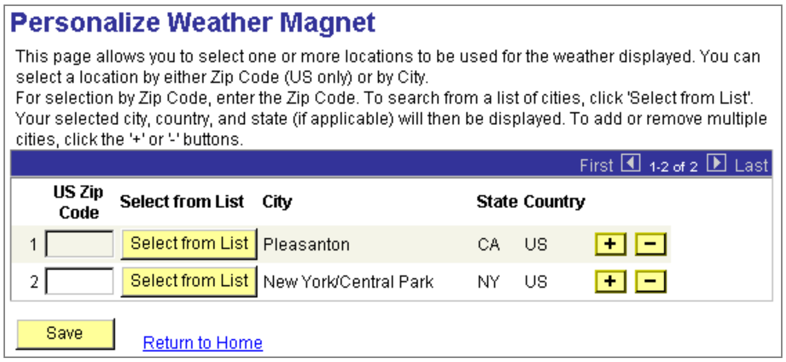
You can personalize the Weather Magnet pagelet to display the forecast for one or more cities of your choice. For a city in the U.S., you can specify the city by providing the U.S. zip code. Otherwise, you can specify the city by selecting from a list of locations. In the following screen illustration, the Weather Magnet pagelet has been personalized to display the forecast for Pleasanton, California.



Weather Magnet pagelet

Personalizing the Weather Magnet Pagelet

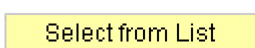
Usage	Use the Personalize Weather Magnet page to specify the location(s) for the weather forecast.
Object Name	EO_PE_WEATHMG_PREF
Navigation	Click the Customize button at the top bar of the Weather Magnet pagelet.



Personalize Weather Magnet page

The Personalize Weather Magnet page consists of two regions. The first allows you to select a city by zip code (U.S. only) or by city. The following fields appear:

US Zip Code Enter a U.S. zip code and move to another field or button.



Click the **Select from List** button to select (alternatively) a city by name using the Lookup Location ID page.

The second region displays the selected city or cities and consists of the following fields:

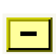
City The city name.

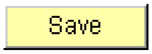
State The state name (when applicable).

Country The country name.

After you select a city by zip code or by location name, the city, country, and state (when applicable) will appear in the second region.


You can add more cities for which to display weather by clicking the **Add** button.


You can remove cities from the display by clicking the **Delete** button. (Cities will be fully removed from the list after you click the **Save** button.)

	Click the **Save** button to save your settings. Cities appear on the pagelet in the order displayed in the list.
Return to Home	Click the **Return to Home** link to return to your homepage without making changes.

Selecting a City Associated With a U.S. Zip Code

To set the Weather Magnet pagelet with a U.S. zip code:

1. Click the Customize button in the top bar of the Weather Magnet pagelet.

   The Personalize Weather Magnet page appears.

2. Enter a U.S. zip code in the US Zip Code text box and click another field or button.

   The screen is refreshed, and the Personalize Weather Magnet page reappears. A new city name—based on the U.S. zip code you entered—appears in the **City** field. Moreover, the names of the associated state and country appear in the **State** and **Country** fields, as appropriate.

3. Click the Save button.

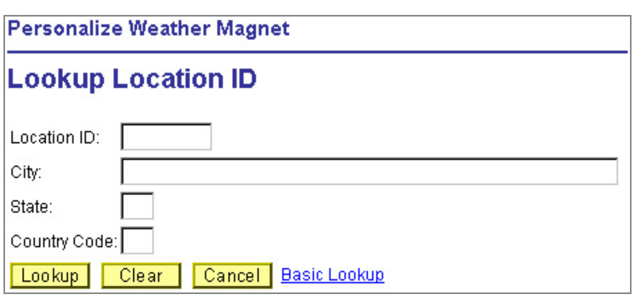
   A confirmation page appears, announcing that your settings have been saved.

4. Click the OK button on the confirmation page.

The Weather Magnet pagelet appears in your homepage with the current forecast for the city or cities that you've specified.

Selecting a City by Name

Usage	Use the Lookup Location ID page to specify a location for the Weather Magnet pagelet.
Object Name	EO_PE_WEATHCACH
Navigation	Click the Select from List button on the Personalize Weather Magnet page.



Lookup Location ID page

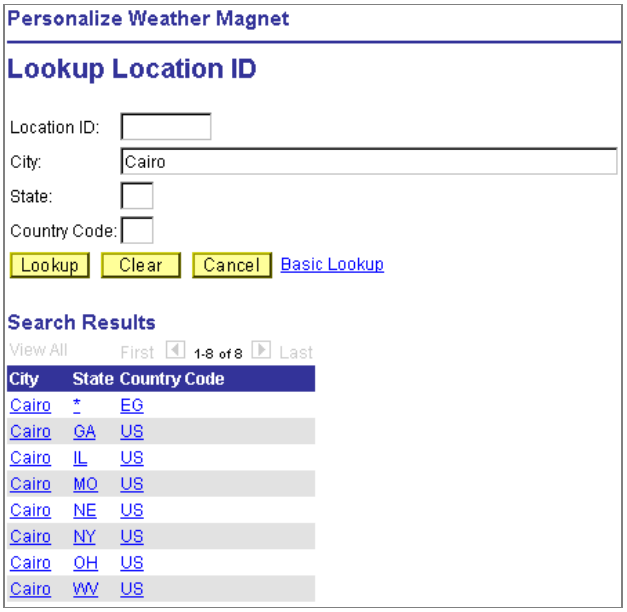
On the Lookup Location ID page, you can enter data in one or all of the following fields: **Location ID, City, State,** and **Country Code.**

Location ID	Enter the Location ID.
City	Enter the city name.
State	Enter the two-letter state abbreviation.
Country Code	Enter the two-letter country code.

The following buttons appear at the bottom of the page:

Lookup	Click the **Lookup** button to start the location search.
Clear	Click the **Clear** button to clear the fields.
Cancel	Click the **Cancel** button to return to the Personalize Weather Magnet page.
Basic Lookup	Click this link to access the basic version of the Lookup Location ID page. On this page, you can select one of the following values for your location search: ***City, Country Code, Location ID,*** or ***State.***

The search engine finds all the cities that fit your criteria and displays a search results list. In the following screen illustration, the search results list displays all cities named Cairo.



Search Results list

To complete the selection process:

1. Click a city name, the two-letter abbreviation for the state, or the two-letter country code from the Search Results list.

   The Personalize Weather Magnet page appears. In the Current Location region, the name of the city appears in the City field. In addition, the names of the state and country appear in their respective fields.

2. Click the Save button to save your settings.

3. Click the OK button on the confirmation page.

The Weather Magnet pagelet appears in your homepage with the current forecast for the city or cities that you've specified.

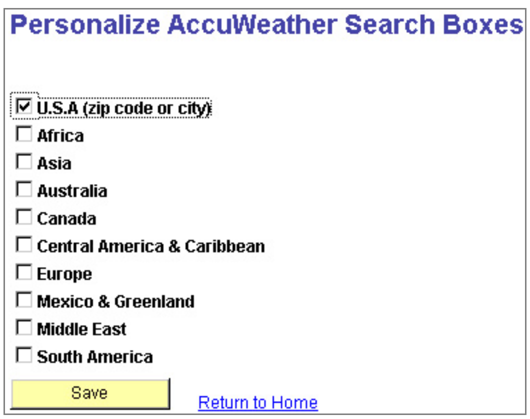
AccuWeather

You can also access weather information from AccuWeather. In the following screen illustration, the AccuWeather pagelet is personalized to display the forecast for any location in the U.S. Unlike Weather Magnet, the weather report does not appear within the pagelet. However, this pagelet does enable you to readily search for weather in a desired region.

AccuWeather pagelet

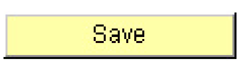
Personalizing the AccuWeather Pagelet

Usage	Use the Personalize AccuWeather Search Boxes page to specify the location for the weather forecast.
Object Name	EO_PE_ACCUWEA_OPT
Navigation	Click the Customize button in the top bar of the AccuWeather pagelet to access this page.



Personalize AccuWeather Search Boxes page

Each location name appears with a check box. To specify the location for the weather forecast, select the location's check box.



Click the **Save** button to save your settings.

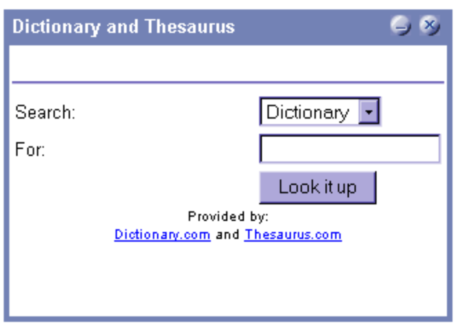
Return to Home Click the **Return to Home** link to return to your portal's homepage.

In the following screen illustration, the AccuWeather pagelet has been personalized to display location selections for Canada and the Middle East.

AccuWeather pagelet (personalized for Canada and the Middle East)

Dictionary and Thesaurus

For your convenience, you can look up definitions, synonyms, and antonyms of words directly from the portal. The Dictionary and Thesaurus pagelet provides access to a web-based dictionary and thesaurus. In addition, if you want to improve your vocabulary, you'll find this pagelet to be a handy tool: it displays a different word each day.



Dictionary and Thesaurus pagelet

Search	Select either ***Dictionary*** or ***Thesaurus.***
For	Enter the word you want to look up.
Look it up	Click the **Look it up** button. The system displays the results on a new page.

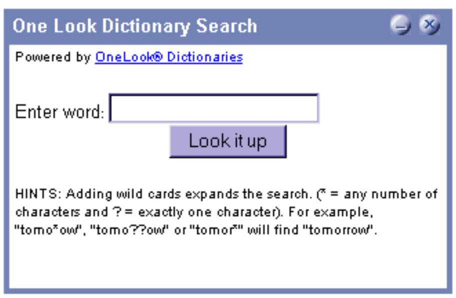
Online Dictionary Search

There are many dictionaries available on the internet. To simplify your dictionary search, PeopleSoft Portal Solutions provide the search box of OneLook Dictionaries, an innovative dictionary search engine. Instead of searching a single dictionary, the OneLook search engine points to many web-based dictionaries. As a result, it can offer you the following advantages:

- A wider breadth of definitions than just one dictionary contains.
- Multiple definitions when a word is located in several dictionaries.
- A strong likelihood of locating obscure words.
- Specialized dictionaries in the arts, business, computers, law, and medicine, among other fields.
- Searches in foreign language dictionaries.

Using the Dictionary Pagelet

As the following graphic shows, the Dictionary pagelet has a simple, easy-to-use interface.



Dictionary pagelet

Enter word	Enter the word whose definition you want.
Look it up	Click the **Look it up** button. The system displays definitions of the word in a search results list.

Non-News Content from iSyndicate Express

There are numerous non-news pagelets available, such as city guides, yellow pages, restaurant guides, and finance search boxes. Whether they're consumer-oriented or business-related, these pagelets provide convenience and quick access to information within the portal.

This section describes various pagelets. They are either registered or non-registered pagelets. Many of them have been collected from numerous internet companies and are available from iSyndicate Express. You can easily locate and register additional features from iSyndicate Express and other providers to expand the pagelets within the portal.

For more information about how to register a pagelet, system administrators should refer to the section Administrator's Task: Creating and Registering HTML-based Pagelets.

Registered Pagelets

The following sections describe the registered pagelets.

Audio

WebRadio.com

WebRadio.com webcasts live radio programming of over 200 radio stations from more than 100 cities to listeners over the internet worldwide, 24 hours a day, seven days a week. Powered by Emblaze®, WebRadio.com provides a multimedia experience without the need for a download or separate plug-in application.

WWW.COM: A Radio Player

WWW.COM offers a vast collection of songs and more than 230 music stations—all available at your fingertips. Whether you favor rock, waltz, or rap, you're likely to find your favorites at WWW.COM.

Search Boxes/General Interest

AccuWeather Search Box

AccuWeather offers complete and accurate forecasts and information. AccuWeather has a wide array of content that you can customize to meet your specific needs and requirements. You can search by zip code or city/state.

CNET Shopper Search Box

CNET Shopper.com is an independent source of information for users that provides a comprehensive, organized resource for determining where to buy computer products on the internet. CNET Shopper.com offers instant information on product availability and direct links to product detail pages.

eHow How To Search Boxes

eHow offers thousands of staff-written, step-by-step project solutions. Whether you’re trying to find out how to change the oil in your car, make Cajun hot sauce, negotiate a raise, or even throw a knuckleball, you can rely on eHow for answers. Coupled with simple instructions, eHow.com offers printable shopping lists and direct links and directions to relevant shopping opportunities. As a result, you can order the goods or services you need to complete your task.

InfoSpace Business Search Boxes

By Category

Search for a business by category (similar to yellow pages).

By Name

Search for a business by name (similar to business white pages).

Companies Online

Search for companies online.

InfoSpace Finance Search Boxes

Stock Quotes

Receive stock quotes from InfoSpace.

Mutual Funds

See a mutual fund summary by InfoSpace.

Stock Charts

Access the stock charts from InfoSpace.

InfoSpace Public Records Search Boxes

Phone & Address

Search for phone numbers and addresses from InfoSpace (similar to residential white pages).

Email

Search for email addresses by username, domain name, or location.

InfoSpace Reference Search Boxes

Maps & Driving Directions

Search for maps and driving directions.

iSyndicate Meta Search Engine

Mamma.com, the developer of a meta search engine for the internet, powers the iSyndicate search engine. As a result, you have access to internet meta search capabilities directly from your homepage.

Scour: Search Box

The Scour search box points the way to downloadable audio, video, and image files, including MP3 audio.

Search Boxes/Financial & Real Estate

ClearStation's A List

ClearStation's A-List, updated throughout each market day, culls the most promising stocks from ClearStation's Tag & Bag screening software and ClearStation's Community. Consider this to be a list of outstanding performers ripe for inclusion in your portfolio or watch list. It's one-stop shopping for daily investment ideas.

CNBC.com Quote Box and Symbol Search Box

Get stock quotes from CNBC.com with its Quote Box and Symbol Search.

EDGAR Online Search Box

EDGAR Online is a commercial provider of Securities and Exchange Commission (SEC) filings and related business intelligence services on the internet. SEC filings are a vital resource for individual investors, professional investors, and other "knowledge workers" who need the competitive information to succeed in today's business environment.

Halfbrain.com's Investing & Stocks Calculators

Halfbrain's Investing & Stocks Calculators can help you plan your investments and determine your long-range financial goals.

Hoover's Company Search Box

Hoover's Online: The Business Network was built to serve the needs of people behind desks. The result is a comprehensive source of business information.

iOwn Home Listings Search Box

iOwn is the leading online provider of mortgages and home ownership products and services. iOwn offers consumers easy-to-use tools and calculators, innovative services such as RateShopper, and comprehensive, unbiased advice.

Search Boxes/Entertainment & Dining

Hotgames.com Search Box

Hotgames.com is a site for gamers who like to stay informed about the latest and most popular game demos, reviews, hints, cheats, and more.

RollingStone.com Music Search Box

The Rolling Stone Network is a large collection of rock and pop multimedia on the web. You can search by artist, song, or album.

ShowTimes Search Box from Hollywood Online

Search for movies and show times in your area with the ShowTimes National Movies Listings search box from Hollywood Online.

ZAGAT.COM Search Boxes

ZAGAT.COM offers detailed ratings and reviews of over 30,000 restaurants, maps and driving instructions, and the opportunity to vote on any restaurant in the world.

Favorite Restaurants

Find your favorite restaurant in any city.

Restaurant Search Box

Search for a restaurant by city and/or name.

Search Boxes/Health

CiteLine Search Box

CiteLine indexes quality sites of interest to professionals in the pharmaceutical and healthcare industries. Every topic from R&D combinatorial chemistry to medical economics is covered, with sites carefully screened by the subject specialists on the editorial team.

Daily Features/Work Strategies

Herman Miller Button

Articles provided by Herman Miller will help you work smarter and achieve your agendas at home with helpful insights on telecommuting, optimizing your live/work space, and using effective work strategies.

Non-registered Pagelets

This section describes the non-registered pagelets.

For more information about how to register a pagelet, system administrators should refer to the section Register and Save Pagelet.

Audio

theDial: A Radio Player

No downloads are necessary for theDial: it’s launched using a simple JavaScript program. Moreover, the Dial Player's interactive GO! button takes listeners directly to more information about what they're hearing. In addition, the interactive HISTORY button displays the links and song/title/artist information for the previous hour of listening. For high-speed connections, Windows Media Player powers theDial Player. Real Audio Player handles low-speed connections.

Search Boxes/General Interest

APBnews.com Neighborhood CrimeCheck

Crime can happen anywhere. You can be a victim in the safest community. What are your odds of becoming a crime victim? Where do you face the least and most risk? The APB/Neighborhood CrimeCheck rating will tell you.

Fish4Cars

Fish4Cars is a database of used cars in the United Kingdom and offers users the opportunity to buy and sell cars, motorbikes, vans, trucks, caravans, and boats. It's supported by road tests and comparison and lifestyle searches. It also includes finance and insurance advice as well as news and features.

Fish4It

Fish4It is a business directory for the United Kingdom. Use this directory to locate any kind of product or service throughout the UK.

Fish4Jobs

Fish4Jobs is a database of jobs in the United Kingdom with opportunities in all of the main recruitment categories. It's supported with career and employment advice as well as news on the job market.

Fish4News&Sports

Fish4News&Sport is a regional news portal for the United Kingdom with access to more than 800 regional newspapers grouped across more than 100 regional websites.

For Sale

A business for sale can be your business opportunity. Search for what's on the market now. This site is powered by bizsell.com.

Company Research Search

Find company snap illustrations, stock screens, price charts, and SEC filings.

InfoSpace Classified Ads Search Boxes

Apartment Search

Search for apartments. Powered by ApartmentGuide.com.

New and Used Automobile Search

Find your next car with this search box.

New and Used Boat Search

Find your next boat with this search box.

Employment Search

Free employment search from InfoSpace (powered by Careerpath.com).

InfoSpace Collectibles Search Boxes

Collectible Items

Find your favorite collectibles with this search box.

Collectible Toys

Search for your favorite toys.

Dolls & Plush

Find that special doll with this search box.

Furniture

Using this search box, you can find the furniture that you need.

Jewelry/Wearables

Use this search box to find jewelry and fine wearables.

Sports Collectibles

Find a special sports collectible with this search box.

InfoSpace Government Search Boxes

By Branch

Search for government services by branch.

By Location

Search for government services by location.

InfoSpace Public Records Search Boxes

Reverse Lookup by Address

You know the address but you don't know who it's coming from. Fortunately, you can track the sender using the reverse-lookup feature. This search works for the U.S. and Canada only.

Reverse Lookupbox by Phone

You can track a phone number using the reverse-lookup feature (for the U.S., Canada, and Caribbean only).

Reverse Lookupbox by Email

If you know the email address but don't know who or where it's coming from, you can track it using the reverse-lookup feature.

Near Address

Search for businesses near a specific address.

InfoSpace Reference Search Boxes

Net Search

Free internet search from InfoSpace.

Schools & Colleges

Research schools (Grades K–12) and colleges across the country. Search by type, city/state, name, or mascot.

theGlobe.com Club Searches

theGlobe.com aggregates users around common themes of interest by providing community services. The company offers a network of email clubs called “globeclubs,” as well as state-of-the-art website building tools.

Topica Search Box

Topica is a free internet service that enables you to find, manage, and participate in email lists. By adding this search box to your site, you enable visitors to search a large email list directory.

WetFeet Searches

WetFeet.com is a provider of inside information on companies, industries, and career advice. This award-winning research service tells you what it's really like to work for thousands of companies in more than 30 industries, helping you to make better career decisions.

Search Boxes/Financial & Real Estate

BestCalls.com Search Box

BestCalls.com tracks the earnings conference call schedules of thousands of publicly traded companies. You can search by company name or stock symbol.

BestRate.com Mortgage Rates Search Box

BestRate.com enables consumers to shop for rates from over 700 mortgage companies nationwide. Other features include calculators, market update, and a reference desk.

ClearStation Quotes Search Box

With ClearStation Quotes, you can access the ClearStation comprehensive information set of price data, graphs, technical indicators, and company information. You can enter multiple stock symbols, separated by a comma or space, to view a number of graph sets on one screen.

Fish4Homes

Fish4Homes is a database of homes to buy and rent in the United Kingdom. It is supported by advice on buying and selling a home, as well as property news, features, and mortgage information. It also includes location details and maps.

InsiderTrader's Search Boxes

InsiderTrader.com provides insider data and commentary that investors need. Free insider data, portfolio alerts, and research are updated daily. An in-depth, online newsletter is also available to subscribers. A new Institutional Services section distributes four quarters of institutional holdings (Form 13F) data.

Mortgage 101 Interest Rate Search Box

Mortgage 101 is an award-winning national consumer resource containing interactive calculators, informative documents, useful tools, and current interest rates. Over 550 mortgage companies post daily interest rates that can be searched by consumers. Consumers can also pre-qualify and apply for a mortgage loan online at Mortgage 101.

Stockpoint Stock Quote Search Box

Stockpoint is an internet provider of financial information and stock analysis tools. Stockpoint levels the playing field for the individual investor by providing access to a full range of investment information.

Wall Street & Technology Search Box

Wall Street & Technology power this search box.

worldlyinvestor.com Search Box

worldlyinvestor.com interprets the world for individual investors. Each proprietary article delivers an idea from one of its financial reporters, columnists, and analysts. Investors gain information to help them make more informed investment decisions.

Zacks Search Box

Zacks Investment Research, Inc. is a provider of investment research and fundamental data to financial websites, universities, software companies, pager services, and institutions. Zacks provides all of the data critical to the online individual investor.

Search Boxes/Entertainment & Dining

Event Searches from WhatsGoingOn.com

WhatsGoingOn.com is a new media travel company that seeks to reveal and revel in the most culturally focused aspects of travel. WhatsGoingOn.com has extensive, timely information about events and festivals worldwide. This 100% original content has been used to create a huge database of upcoming events. WhatsGoingOn.com is aimed at a young, intelligent, and adventurous audience of travelers who can find entertainment, plan their trips, and book their travel tickets on the site.

RollingStone.com This Day in Rock Button

A feature of the Rolling Stone Network, This Day in Rock provides new information daily.

InfoSpace Entertainment Search Boxes

Art and Culture

Check for upcoming events in the fine arts, including plays, art exhibits, music, and dance. Search across the U.S. and Canada. Powered by CultureFinder.com.

Celebrities

Keep up-to-date on your favorite celebrities.

Concerts

Search for upcoming shows by artist and location.

Daily Horoscopes

What's in the stars for you today? The daily horoscopes will tell you.

Search Boxes/Commerce

AutoWorld.com Search Box

AutoWorld.Com is a guide for automotive needs. It provides free online vehicle pricing along with many other consumer services.

PriceGrabber.com Search Box

PriceGrabber.com provides value-added information on computer products, compares prices among online retailers, determines the true value of a product offering before you buy, and assures you of getting the very best deal.

PC World Online Search Box

PC World Online is a definitive source on the web for expert computer information on what to buy and how to use it. PC World Online is directed toward and used primarily by business managers—company owners, operations directors, sales managers, manufacturing supervisors, and financial managers—who view PCs as an integral strategic tool for business.

Search Boxes/Travel

InfoHub Tour Search Boxes

InfoHub.Com provides comprehensive information on unique adventure, art, learning, and sporting vacations around the world.

Horoscopes/Readings

Astrology.com Horoscopes

Astrology.com offers daily and comprehensive horoscopes.

Tarot and I-Ching Readings by Visionary Networks

Tarot and I-Ching readings are popular with many audiences. Visionary Networks' Tarot Magic and The Oracle of Changes offer fun and insightful content.

Free Daily Horoscopes from Women.com

What's in the stars for you? Get a fix on your day with free daily horoscopes from Astronet. Astrologer Jeanne Avery provides insight and guidance for daily living.

Daily Features/Calculators

E-Loan Mortgage Center

E-Loan, Inc. is a multilender internet mortgage company that offers a variety of loan products to users over the web. By eliminating the need for an agent, E-Loan has helped revolutionize the mortgage industry by drastically reducing the transaction costs associated with obtaining a home loan.

Halfbrain.com Education Calculators

Halfbrain Education Calculators can help with planning monthly and quarterly expense budgets for college students as well as with saving for college and grade point average (GPA) tracking.

Halfbrain.com Fun & Entertainment Calculators

Calculate how to become a millionaire with the Halfbrain Fun & Entertainment Calculator.

Halfbrain.com Health & Fitness Calculators

Halfbrain Health & Fitness Calculators can help you get in shape with a runner’s log, calorie burning plan, and baby vaccination schedule.

Halfbrain.com House & Home Calculators

Use the Halfbrain House & Home Calculators to help you with many house-related tasks, such as event planning and calculating recipes.

Halfbrain.com Measurement and Conversion Calculators

Halfbrain Measurement Conversion Calculators will help you to convert a variety of units of measure.

Halfbrain.com My Kids Calculators

Halfbrain My Kids Calculators help you track your children's growth.

Halfbrain.com Personal Finance Calculators

Halfbrain Personal Finance Calculators help users manage everything from debt consolidation to retirement planning.

Halfbrain.com Sports Calculators

Determine your golf handicap with the Halfbrain Sports Calculator.

Daily Features/Fun

BitMagic's daily and weekly content uses Flash technology and is delivered to users using a thumbnail and pop-up window on an affiliate's website. Whenever a user clicks the thumbnail image of the BitMagic content, the pop-up window is activated and the content is immediately available for viewing.

FREE Bingo Games from Women.com

Play FREE Bingo games for fun or for cash and prizes, 24 hours a day, 7 days a week.

Entertaindom: eBreak

Entertaindom.com features cutting-edge entertainment that includes short films, original programming, and animation as well as everything you need to know about Hollywood's hottest celebrities, movies, and music.

Ask dr tech ® Daily Comic Strip

An edgy, entertaining slant on the frustrating glitches we all face as computer users. With a clenched jaw, you may see yourself in this comic strip. Is your life a constant error message? Beware.

Daily Features/Insurance Quotes

InsWeb Insurance Quotes

Think you can save? Get free, no-obligation insurance quotes from leading companies.

Daily Features/Kids

Zeeks.com Daily Fun and Games Buttons

Zeeks.com is a destination website that provides a safe environment for kids (K–12) to use a safe search engine, send email, conduct online chat, or play one of over 150 online games. Moreover, kids can produce a multimedia project, keep a personal calendar, or visit the community kids area. Kids will also be linked to free games, puzzles, mazes, brain teasers, daily educational information, and more.

Daily Features/Music

Firstlook Charts

FirstLook.com is a way to discover and hear new music quickly—from new music by big-time established stars to independent bands that are just moving out of their parent's garages. Sampling music is just one click away.

Daily Features/New Media & Computers

Compu-KISS® Radio With Sandy Berger

Sandy Berger's Compu-KISS® program (“The Computer World...Keeping It Short and Simple”) is designed to translate the complex technical terminology used in the computer world into simple, everyday language that people can understand. Topics covered on the program include software and hardware products, popular internet sites, current events in technology, and even an occasional look into the future of our growing computer culture.

Wired newzgizmo

Culture and technology cybernews from Wired magazine, updated daily and packaged in an exciting, animated "newzgizmo." Full streaming multimedia for your site with no need for plug-ins or downloads.

Daily Features/Sports

One Minute Video Golf Lesson

Add streaming video content with this RealVideo series of golf lessons. Professional golf instructor Peter Anderson, of the Myrtle Beach Golf School, guides you through the lessons.

Administrator's Task: Setting Up Weather Magnet

To set up Weather Magnet, you’ll have to perform these tasks:

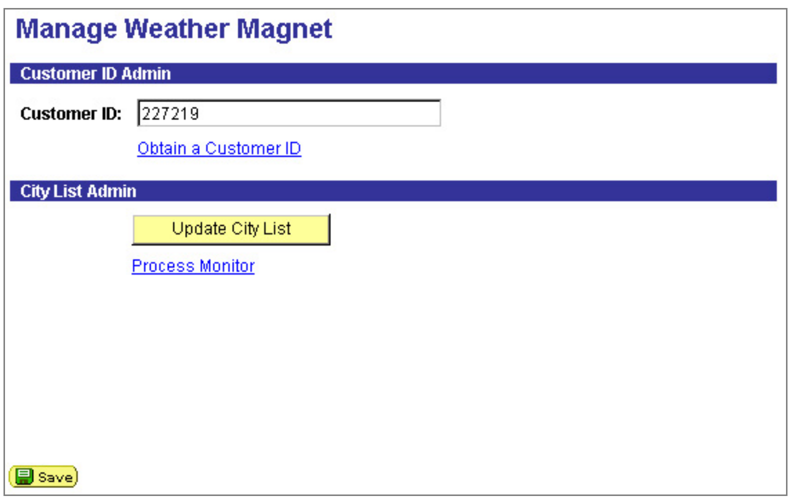
- Enter a customer ID on the Manage Weather Magnet page.
- Fill the location tables with an updated list of cities.

The customer ID is provided by weather.com. It enables weather.com to identify the traffic generated by your organization's portal. If you don't have a customer ID, you can create a new account by filling out an online form at the weather.com site. To access this online form, click the Obtain a Customer ID link on the Manage Weather Magnet page.

You must populate the location tables with an updated list of cities. PeopleSoft delivers an initial list of world cities. However, you should periodically perform the task again to update outdated information and access new cities in the database. You can also use the Process Scheduler to perform this task automatically on a scheduled basis.

Using the Manage Weather Magnet Page

Usage	Use the Manage Weather Magnet page to set up Weather Magnet for your portal.
Object Name	EO_PE_WEATHMAG_ADM
Navigation	**Home, Menu, Portal Administration, Pagelet Administration, Weather Magnet**



Manage Weather Magnet page

Customer ID Admin (customer ID administration)

Customer ID Enter your customer ID in this text box.

Obtain a Customer ID Click this link to create a new account at the weather.com site.

City List Admin (city list administration)

Click the **Update City List** button to schedule the process of retrieving and storing a complete list of locations provided by weather.com.

Process Monitor	Click this link to access the Process Scheduler.
	Click the **Save** button to save your settings.

Obtaining a Customer ID

To obtain a customer ID:

1. Access the Manage Weather Magnet page.
2. Click the Obtain a Customer ID link.

   The weather.com site appears in a new browser window.
3. Read the license agreement.
4. Click the Accept button.
5. Click the Continue button.
6. Click the Sign-Up button.

   An online form appears.
7. Enter information in the required fields of the online form.
8. Click the Continue button.

   A confirmation page appears. It announces that your account has been created.

To continue the registration:

1. Click the Continue button.

   A drop-down list box appears. It contains a list of regions.
2. Select a region from the drop-down list box.
3. Click the Select Region button.

   A drop-down list box appears. It contains a list of countries.
4. Select a country from the drop-down list box.
5. Click the Select Country button.

   A drop-down list box appears. It contains a list of cities.
6. Select a city from the drop-down list box.

7. Click the Select City button.

The information that you supply for region, country, and city will not be used for your portal. Instead, when users customize the portal, they will specify the information for region, country, and city. However, you must supply the information in order to complete the registration.

When you click the Select City button, a product registration form appears.

8. Enter your organization's homepage URL in the Page URL field.
9. Enter your organization's name in the Company Name field.
10. Select your organization's category from the Site Category drop-down list box.
11. Click the Continue button.

A page appears with a message that announces the successful completion of your registration. In addition, HTML code appears, which you must include in the HTML programming of your site.

Your customer ID is embedded within the HTML code. Look for `&code=xxxxxx` (where `xxxxxx` represents the customer ID) near the top of the code. Use `xxxxxx` as the Customer ID you enter on the Manage Weather Magnet page.

PeopleSoft is currently working with weather.com to simplify this process.

Setting Up Weather Magnet

To set up Weather Magnet for your portal:

1. Access the Manage Weather Magnet page.
2. Enter your customer ID in the Customer ID text box.
3. Click the Update City List button.

You have now scheduled a process in which a complete list of locations is downloaded from the weather.com site. You can monitor the status of this process by clicking the Process Monitor link. If the process is queued but not running, be sure a process scheduler is running.

Administrator's Task: Setting Up My Portfolio

The default URL used to access Inlumen is intended for demonstration and evaluation purposes. The URL does not have access to all stock ticker symbols. You can contact Inlumen to activate the “PeopleSoft Portfolio," which provides access to a broader offering. Free stock quotes are available until a limit is reached.

For more information about how to activate the Inlumen PeopleSoft Portfolio, refer to “Introducing the Content/Solution Providers”.

To set up My Portfolio for access to a broader offering:

1. Contact Inlumen and obtain your own URL for the PeopleSoft Portfolio.
2. In the portal's Menu pagelet, navigate to PeopleTools, Utilities, Use, URL Maintenance.
3. Click Search on the URL Maintenance Find an Existing Value page.
4. Click the link for INLUMEN STOCK SERVER.
5. Change its URL from the default (http://www.peoplesoft.newsalert.com/) to your own URL obtained from Inlumen.
6. Click Save.

Administrator's Task: Creating and Registering HTML-based Pagelets

This section describes one method for creating and registering homepage pagelets with PeopleSoft Portal Solutions.

One of the powerful features of PeopleSoft Portal Solutions enables you to create a homepage pagelet based on HTML or JavaScript. Instead of using PeopleTools, you can use a utility page—designed specifically for PeopleSoft Portal Solutions—that transforms your HTML or JavaScript code into a pagelet.

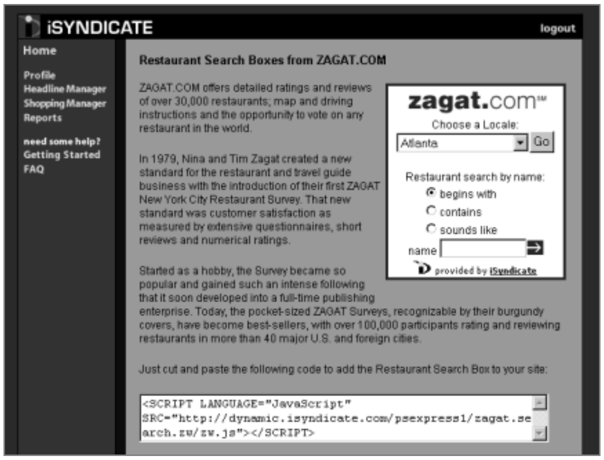
For more information about other ways of developing pagelets, refer to the chapter Developing Pagelets in the *PeopleTools Portal Technology PeopleBook.*

Creating an HTML-Based Pagelet

Obtaining the HTML Code

As an example of creating a homepage pagelet, we’ll use the Zagat Restaurant search box (from iSyndicate Express) as the pagelet that we’d like to include in the portal.

In the following screen illustration, HTML code (which references a JavaScript program) is supplied by iSyndicate Express. The HTML code appears in the text box located near the bottom of the page.



HTML code for the Zagat restaurant search box

To obtain the HTML code, you simply cut it from the text box. (Eventually, you'll paste it onto a utility page.)

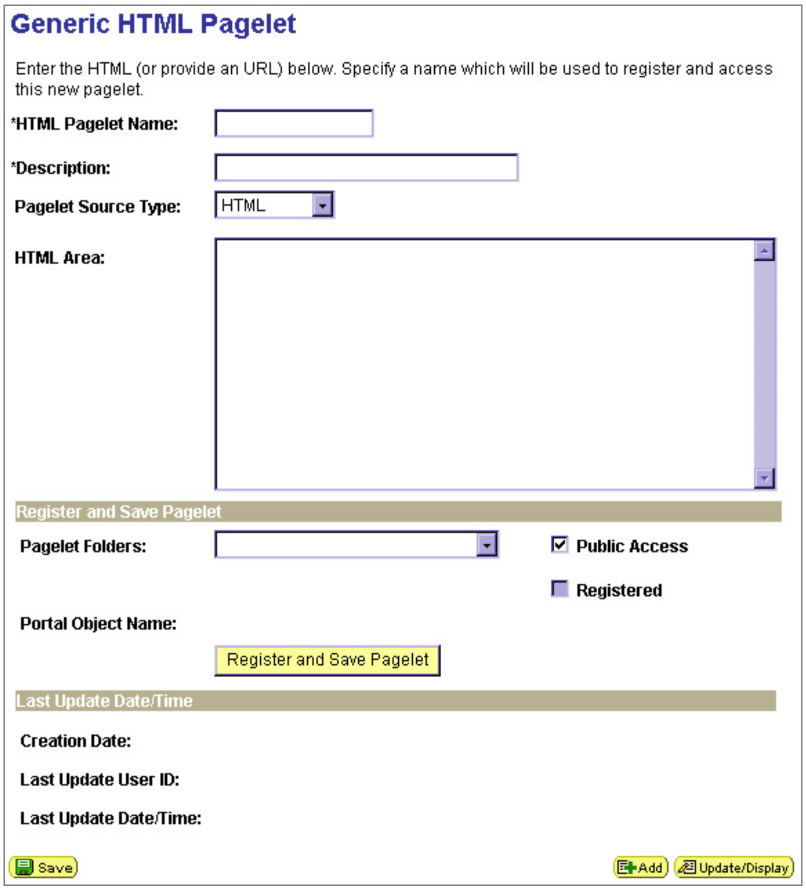
As the following screen illustration shows, when the HTML code is integrated with PeopleSoft Portal Solutions, a homepage pagelet for the Zagat restaurant search box is created.

Zagat Guide pagelet

Creating the Homepage Pagelet

Usage	Use the Generic HTML Pagelet page to save the homepage pagelet's HTML code in the portal's database. You can also register the HTML pagelet from the Register and Save Pagelet group box. The name specified for the HTML pagelet is used to register the pagelet.
Object Name	EO_PE_HTML_PAGELET

Navigation	**Home, Menu, Portal Administration, Pagelet Administration, HTML Pagelets**
Prerequisites	None
Access Requirements	Click the Add a New Value link on the Find an Existing Value page. Enter an HTML pagelet name in the HTML Pagelet Name field of the Add a New Value page. Then click the Add button.



Generic HTML Pagelet page

HTML Pagelet Name Enter a name to identify the pagelet. This is the pagelet label that will appear in its title bar.

Description Enter a description of the pagelet.

Pagelet Source Type You can select the following pagelet source types: ***HTML, HTML Obj, JavaScript,*** and ***Unknown.*** For our example of creating the Zagat Restaurant Search pagelet, select ***HTML*** from this drop-down list box.

HTML Area To bring the HTML code into the portal, paste it inside the **HTML Area** field.

Register and Save Pagelet

Pagelet Folders

Use the **Pagelet Folders** drop-down list box to select the appropriate pagelet folder.

Public Access

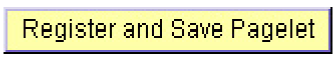
Select this check box to specify that the pagelet will have public access. When deselected, the security is defaulted to only the user who registers the pagelet. Pagelet security can then be modified by accessing the content reference.

Registered

If the pagelet has already been registered, this field appears with a check mark.

Portal Object Name

This is an auto-generated field: when the system displays a previously saved pagelet, the portal object name appears in this field.



Click the **Register and Save Pagelet** button to register and save the homepage pagelet.

Last Update Date/Time

Creation Date

When the system displays a previously saved pagelet, this field displays the date the pagelet was created.

Last Update User ID

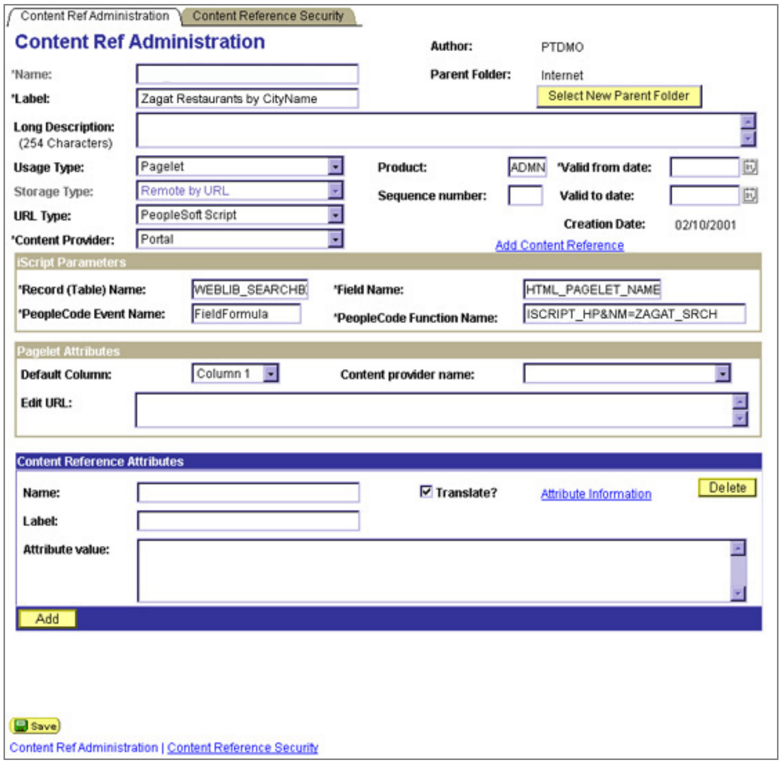
Displays the User ID of the user who last updated the pagelet.

Last Update Date/Time

Displays the date and time when the pagelet was last updated.

The Registered HTML Pagelet

As the following screen illustration shows, when you register the HTML pagelet, an associated entry is created in the Content Ref Administration page.



Content Ref Administration page

The pagelet's description that we entered on the utility page now appears in the **Label** field of the Content Ref Administration page.

For more information about the Content Ref Administration page, refer to the chapter Using Portal Administration Features in the *PeopleTools Portal Technology PeopleBook.*

Creating a JavaScript-Based Pagelet

As with HTML code, JavaScript programs can be turned into pagelets. You can set the Generic HTML Pagelet page to reference a URL where the JavaScript code is located. You can also store the JavaScript code in the HTML Area field.

To create a JavaScript-based pagelet:

1. Access the Generic HTML Pagelet page.
2. Enter the pagelet's name in the HTML Pagelet Name field.
3. Select ***JavaScript*** from the Pagelet Source Type drop-down list box.

4. If you're referencing a URL where the JavaScript code is located, enter the URL in the URL field.

5. If you've written JavaScript code or obtained it from the source's website, paste the code in the HTML Area field.

6. Register the pagelet using the registry method for HTML-based pagelets.

CHAPTER 9

Introducing the Content/Solution Providers

PeopleSoft Portal Solutions have *pre-integrated* and delivered several content and service solutions from internet content providers. Each of these third-party solution providers offers PeopleSoft customers basic content and services out of the box to help support web business objectives (that is, a basic service plan). In addition, there exists an opportunity to receive expanded, customized business-oriented portal content and services through a separate agreement with each respective third-party solution provider (that is, an expanded service plan).

Each agreement:

- Requires a separate contract (between the PeopleSoft customer and the third-party solution provider).
- Requires additional costs (to the PeopleSoft customer).

Offerings from content/solution providers are subject to change. For current information, please email the respective contact or visit the associated website.

In what follows, you'll learn about each content/solution providers Basic and Expanded Services.

For more information about each supplier's services, you can visit the *Supplier Directory* at www.peoplesoftmarketplace.com and select ***Portal*** from the Solution Area drop-down list box.

Moreover

Basic Service	*Expanded Service*
Value Proposition Moreover powers PeopleSoft Portal Solutions with up-to-the-minute news and information that organizations use to: • Provide comprehensive breaking headlines on any of 300 key topics and industries from over 1800 web sources. • Access new information that takes search engines between 24 hours and two weeks to find. • Increase portal usage with fresh, valuable content.	**Value Proposition** Moreover provides the customized information companies need to: • Monitor, anticipate, and outmaneuver the competition. • Track client and partner developments. • Close sales with instant, relevant knowledge about prospects. • Anticipate changing market conditions. • Save thousands of research hours, organization-wide.
Features The Moreover Basic Service, pre-integrated into the PeopleSoft Portal, provides comprehensive coverage on 300 key topics. The following features are included: • Headline feeds of the latest news extracted from our basic database of general sources, with links to the full text articles. • Each feed precisely targeted to one of 300 news categories. • Automatic updates delivered continuously—providing immediate access to critical information. • Fast, seamless integration as part of PeopleSoft8. • Custom control of look and feel.	**Features** Moreover gives the PeopleSoft Portal the power of a customized, one-stop web intelligence resource. The following features are included: • Customized topics—monitor coverage on your organization, competition, industry, or any other topic that affects your business. • Premium Sources—expand coverage to thousands of qualified industry and specialized publications, including the power to track any custom-selected source on the web. • Early Warning Sources—thousands of discussion boards and newsgroups enable you to track opinion, rumor, and buzz on the web. • Fast, Effortless Upgrade—Estimated integration time for PeopleSoft8 clients is approximately 72 hours from contract.
Cost Delivered with PeopleSoft Portal Solutions.	**Cost** Fees for Expanded Service start at $30,000 per year (per organization). Prices subject to change.

For more information, send email to psinfo@moreover.com, or visit www.moreover.com/site/products/index.html.

iSyndicate

Express Service (Basic Service)	***Network Service (Expanded Service)***
Value Proposition The iSyndicate Express Service is an embedded click-away content solution for Peoplesoft Portal Customers.	**Value Proposition** The iSyndicate Intelligent Syndication Network (ISN) is the essential syndication layer that enables large enterprise customers to seamlessly collect, filter, distribute, and manage digital information.
Features The iSyndicate Express Service, pre-integrated into the PeopleSoft Portal, powers the PeopleSoft Portal with: • 175 of the 'best' Express news feed/categories distributed among 11 news groups. • An integrated click-away content solution. • Pre-defined content categories available out of the box. • Headlines of the latest news extracted from 500 general sources, with links to the full text articles. • Limited flexibility for managing and customizing content.	**Features** The ISN solution empowers Peoplesoft portal customers with a content solution that includes the following features: • Flexibility: ISN delivers content in an XML or HTML format locally to client-side servers, enabling you to index and archive content. • Targeted and Customized Content: ISN provides a strong filtering feature through keywords and profiles, providing highly targeted information to your users about their respective accounts, competitors, and vertical markets. • Depth of Content: iSyndicate offers subscription-based content solutions from 1,200 of the most recognized content providers accounting for over 4,000 content products. • Scalability: Virtually unlimited of numbers of information/content sources and numbers of subscribers.
Cost Delivered with PeopleSoft Portal Solutions.	**Cost** Portal Solution Packages are priced between $1,500-$5,000 per month per organization. Prices are subject to change.

For more information, send email to info@isyndicate.com, or visit http://sales.isyndicate.com/peoplesoft/join.html.

ProjectConnections.com

Basic Service	***Expanded Service***
Value Proposition ProjectConnections.com powers the PeopleSoft portal with practical resources that enable project managers and team members to do the following: • Easily locate tools, assistance, and resources for daily project work. • Learn new techniques for handling project challenges and avoiding typical problems. • Solve project issues quickly to save time and money.	**Value Proposition** ProjectConnections.com powers your business by providing these features: • In-depth answers to critical project management questions. • Downloadable templates to help you get your job done.
Features The ProjectConnections.com Basic Service, pre-integrated into the PeopleSoft Portal, provides valuable know-how on a wide range of project management subjects, from scheduling and risk management to teambuilding and tools. The Basic Service dynamically highlights four (4) important project management resources available at www.projectconnections.com, including: • Practical papers, presentations, and periodicals, and links to our experts' favorite websites on every subject. • A comprehensive bookstore and product and services buyers guide. • A searchable tools directory to help you find the management software that best meets your needs. • Discussion forums where you can ask questions of peers and experts online anytime.	**Features** ProjectConnections.com provides additional premium information and services, including the following features: • A knowledge base of answers to project management "burning questions." • Downloadable templates and checklists that cover every stage of your project. • A rich archive of columns by ProjectConnections.com expert contributors.

Basic Service	*Expanded Service*
Cost Delivered with PeopleSoft Portal Solutions.	**Cost** Fees for Expanded Service start at $14.95 per month or $149 per year (per user). Prices subject to change.

For more information, send email to info@projectconnections.com, or visit www.projectconnections.com.

Inlumen

Basic Service	*Expanded Service*
Value Proposition Inlumen powers the PeopleSoft portal with real-time news and market data from 3,000 news sources from around the world along with key market statistics. This “actionable content” enables your employees to make quick and better informed decisions. Value is delivered through stock quotes, real-time news, trade journals/publications, local newspapers, etc.	**Value Proposition** The Inlumen content solutions power your business by enabling your organization and your employees to quickly personalize massive amounts of information to support more informed and better decisions in your business. Inlumen delivers “actionable content” through a unique combination of personalization, applications, and filter development.

Basic Service	***Expanded Service***
Features The Inlumen Basic Service, pre-integrated into the PeopleSoft portal, provides: • Market snapshot of the NYSE, Nasdaq, and S&P 500. • Most Active Stocks. • World Indices and Currencies. • *PeopleSoft Portfolio*: Stock quotes so your employees can track competitors, suppliers, partners, and their own holdings. This service is provided free for the first 25,000 quotes or headlines, or 2,500 full text stories in any one month. Fees start at $50 per month once threshold is surpassed. Prices subject to change. **Note.** To enable *PeopleSoft Portfolio*, please see the contact information below. Planned for future release: • Pre-built custom filters drawing from 3,000 sources in real-time such as the latest Human Resources stories, the latest eBusiness stories, and top industry headlines. • Linking to full text stories for these filters.	**Features** The Inlumen Expanded Service provides the following features: • Alerts: email and wireless on *any* internal or external content. • International and Domestic Content: 3,000 sources including premium content such as Knight-Ridder, Associated Press, Dow Jones, and the Wall Street Journal. • Personalization: your employees can personalize their own news and market information. • Custom filters built for you. • Dow Jones, AP, and Reuters delivery if client has existing contract in place. • Ability to manage easily internal news in any format—in real time and with personalization. • Content from *virtually any website* in the world can be added immediately. • Global Market Data from most major worldwide exchanges, as well as commodity, mutual fund, and fixed income data. • Effortless Upgrade—Estimated integration time for PeopleSoft customer is measured in days.
Cost Delivered with PeopleSoft Portal Solutions.	**Cost** Fees for Expanded Service start at $12000 per year (per organization). Prices subject to change.

For more information, send email to peoplesoft@inlumen.com. You can also visit www.inlumen.com to obtain more information.

Oblix Publisher Pagelet

The Oblix Publisher Pagelet provides customers with a portal interface to the Oblix Publisher application.

You must own or purchase Oblix Publisher to obtain and activate this pagelet.

This pagelet can be used alone or it can be used in any portal application, such as PeopleSoft Portal Solutions. It provides the user with a place to add a search string, select search criteria, and launch the search. The search results are rendered in the Oblix Publisher application, where the user can view organizational charts, table views, and customized views of employee and contractor information. Oblix Publisher puts directories and organization charts online and provides your employees with powerful tools for searching, locating, and viewing. The end result is efficiency.

Features

The pagelet contains the following fields and buttons:

- Search string (any text string that you would like to search for in the Lightweight Directory Access Protocol [LDAP] directory managed by Oblix).
- Search Comparison Operator (a drop down list of operators, such as "contains", >, "sounds like," and so on).
- Searchable Attribute (a drop down list of searchable attributes, as defined in the Oblix Service Center application).
- Search Results Format (a radio button option of table format or J-Card format).
- Search Button.
- Advanced Search Button.

The pagelet is available as an HTML file (*.htm).

For more information about installing and using the Oblix Publisher Pagelet, please refer to the Oblix Publisher Pagelet documentation. To request the pagelet and associated documentation, send email to peoplesoft@oblix.com.

CHAPTER 10

Submitting and Managing Menu Items

The Menu Item feature of PeopleSoft portals enables portal users to contribute information to their organization's intranet while leaving the registration of the process to the portal administrator.

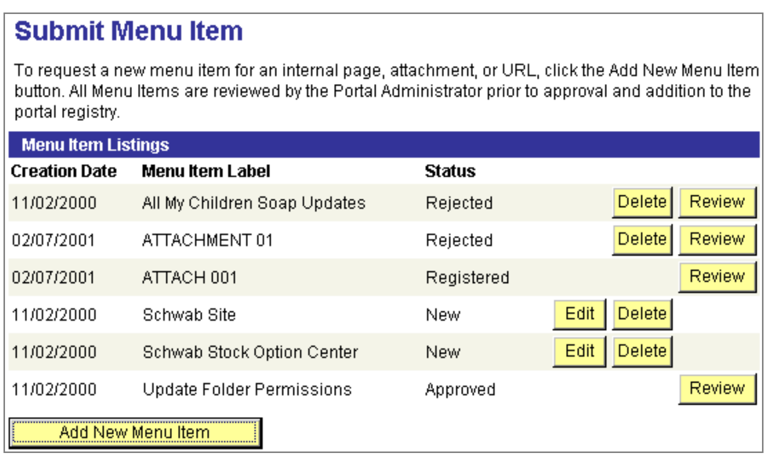
The Menu Item feature provides two-part functionality—one part for the portal user and another for the portal administrator. The portal user can submit a menu item for a file attachment, a URL, or a PeopleSoft URL. The portal administrator reviews the item and then notifies the portal user if the item has been registered or rejected or if it needs to be reworked.

This chapter explains these processes:

- How the portal user submits and edits a menu item.
- How the portal administrator assigns a status to a menu item, locates a place in the portal registry to register the item, gives the item security, and maintains the list of menu items.

Submitting a Menu Item

Usage	Use the Submit Menu Item page to review, edit, or delete existing items, or to access the Menu Item Form to submit a new item.
Object Name	EO_PE_REGSTRY_SRCH
Navigation	**Home, Submit Portal Content, Menu Items**



Submit Menu Item page

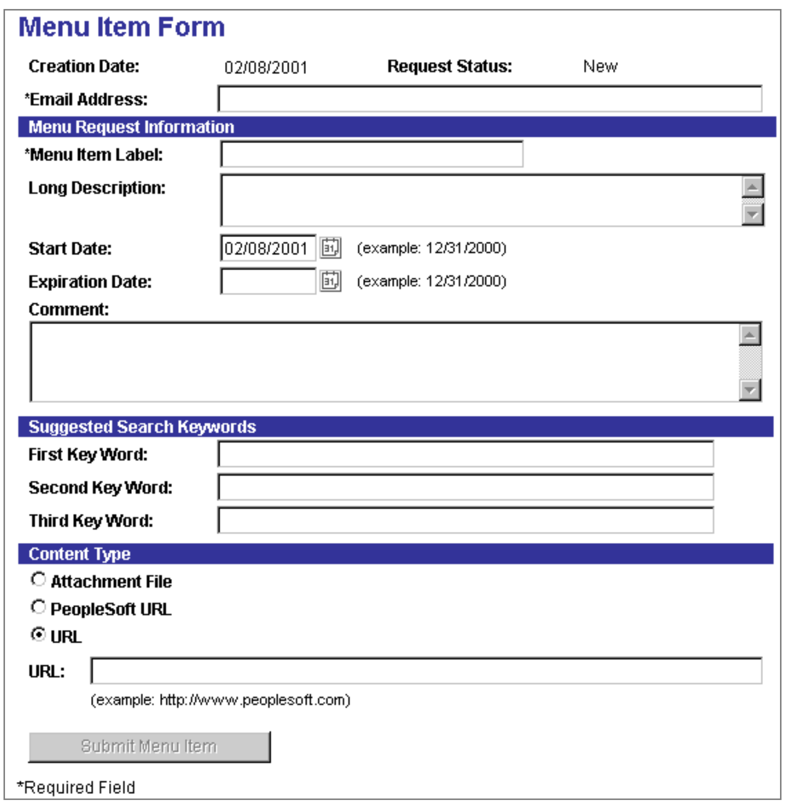
The **Menu Item Listings** group box displays menu items previously submitted by the user. The list also displays the **Creation Date, Menu Item Name,** and the **Status** for each item. In addition, you can click the following buttons for selected items:

Edit	Click to display the Menu Item Form for editing.
Delete	Click to delete the item.
Review	Click to view the Menu Item Form.

Click the **Add New Menu Item** button to request a new menu item.

Using the Menu Item Form

Usage	Use the Menu Item Form page to enter details of the menu item and to view an existing item form.
Object Name	EO_PE_SUBMIT_ADD
Navigation	**Home, Submit Portal Content, Menu Items, Add New Menu Item button**



Menu Item Form page

The **Creation Date** and **Request Status** appear at the top of the page.

Email Address	Enter the requestor's email address (if one is not entered by default or is incorrect). The portal administrator uses this address to notify the portal user of item status changes.
Menu Item Label	This is the Menu Name displayed in the portal.
Long Description	This is the text that will appear under the Menu Name in the portal.
Start Date	If the start date is later than today, enter a future date, or click the calendar icon to select a future date. The start date is the first day you would like the menu item available on the portal (for example, 12/01/2000)
Expiration Date	Enter an expiration date, or click the calendar icon to select a date. This date is the *last* day that you would like the menu item available on the portal (for example, 12/31/2000).
Comment	Enter comments, such as where you would like the content placed.
First Key Word, Second Key Word, Third Key Word	In the **Suggested Search Keywords** group box, you can enter keywords that will help users find the menu item at a later date.
Content type	In the **Content Type** group box, select the type of menu item that you are submitting**: Attachment File, PeopleSoft URL,** or **URL.**
Attachment File	1. Click **Add.** 2. Enter the location, or click **Browse** to locate the file. 3. Click **Upload** to upload the file to a staging area.

For more information, see Working with File Attachments.

PeopleSoft URL — The **PeopleSoft URL** is a request to register a PeopleSoft application page created in PeopleTools Application Designer.

1. Select a market. For example, GBL (global).
2. Enter a menu name. For example, DEFINE_GENERAL_OPTIONS.
3. Enter a component name. For example, EO_PE_INSTALLATION.

URL — Enter the address in the **URL** text box. Use the format given in the example on the page: http://www.peoplesoft.com

Submit Menu Item — Click to submit the menu item. A confirmation message appears.

The menu item is submitted to the portal administrator, whereupon it is reviewed and assigned one of four statuses:

Status	***Definition***
Registered	The item is accepted and registered in the portal registry.
Approved	The item is approved, but has not been registered yet.
Reworked	The item needs to be reworked before it can be registered.
Rejected	The item will not be registered.

If the portal administrator changes the status of an item to *Registered, Rework,* or *Rejected,* the requestor receives an email notification. If the item needs reworking, follow the steps in Resubmitting a Menu Item.

Resubmitting a Menu Item

If a menu item receives a *Reworked* status, the requestor can edit the content and then resubmit the menu item.

To resubmit a menu item:

1. From the Menu pagelet, click Submit Portal Content, Menu Items.

   This page displays a list of previous menu items with their statuses.

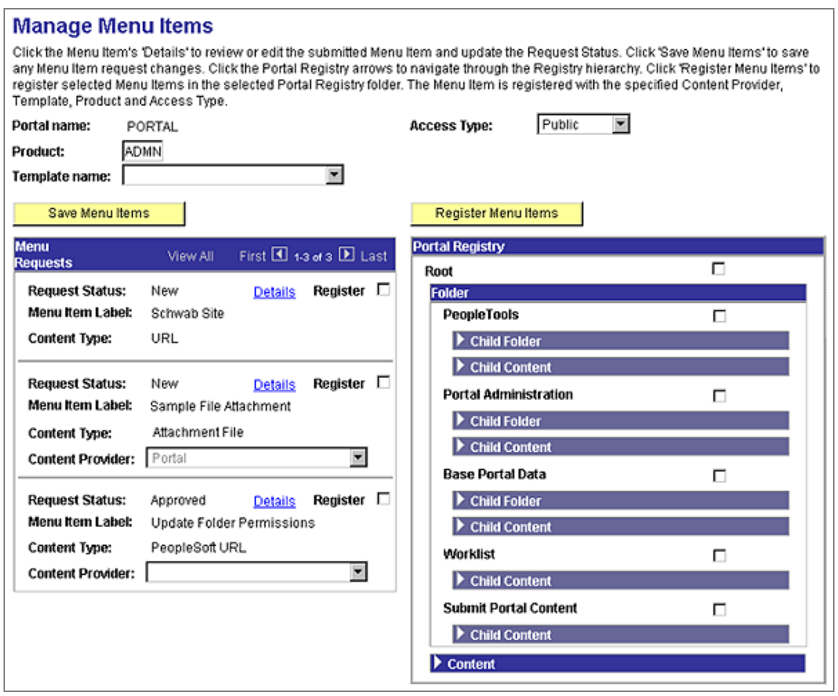
2. Find the menu item to be reworked.
3. Click Edit.
4. Read comments from the portal administrator, and then complete the necessary changes.

5. If necessary, add additional comments on the Menu Item Form.

6. Click Submit Menu Item to save changes and resubmit the item.

Managing Menu Items

Usage	Use the Manage Menu Items page to assign statuses to menu requests and to register menu requests in the portal registry.
Object Name	EO_PE_STG_REGISTR
Navigation	**Home, Portal Administration, Menu Items, Manage Menu Items**
Prerequisites	None
Access Requirements	None



Manage Menu Items page

Only the portal administrator has access to the Manage Menu Items page, to change the status of menu requests, edit Menu Request Forms, assign security, and select a place in the portal registry where the request is to be registered.

Portal name	Auto-generated name, based on the current portal the administrator is in.
Access Type	Select ***Permission*** or ***Public*** security access.

Conditional fields, if you select ***Permission:***

Author Access Select if you want the author to have access.

Permissions Type the name of the permission list, or click to look up and select a permission list.

Product Leave the default entry, ***ADMN,*** as is.

Template name Select a portal template name from the drop-down list box.

Save Menu Items Click the **Save Menu Items** button to save any changes to the menu item request.

Register Menu Items Click the **Register Menu Items** button to register selected menu items in the selected portal registry folder. The menu item is registered with the specified content provider, template, product, and access type.

Menu Requests

Request Status The status of the request. Statuses are ***New, Approved, Registered, Reworked,*** or ***Rejected.***

Details Click the **Details** link to view or edit the corresponding Menu Item Form.

Register Select this check box to select the request for registration.

Note. Selecting this check box does *not* register the request; it only *selects* the request for registration.

Menu Item Label The menu request name.

Content Type ***Attachment File, URL,*** or ***PeopleSoft URL.***

PeopleSoft URLs require a content provider, which you must specify before registering the menu item.

For more information about file attachments, see Working with File Attachments.

Content Provider If the content type is ***PeopleSoft URL,*** select a content provider from the drop-down list box.

File attachments require a content provider, but the Content Provider field always defaults to ***Portal.***

External URLs do *not* require a content provider.

Portal Registry

The Portal Registry group box displays the folder structure of the portal registry. You can drill down within the registry hierarchy to find and select where the menu requests will be registered.

Root To register menu items in the root directory, select the **Root** check box.

Child Folder To view the names of folders in a directory, click the **Child Folder** arrow.

To drill down in a child folder, select a registry item, then click .

Select a check box next to the desired location for the menu items.

Child Content To view the contents of a child folder, click the **Child Content** arrow.

Registering Menu Items

To register menu items:

1. From the portal homepage, click Portal Administration, Menu Items, Manage Menu Items.
2. In the Menu Requests group box, select one or more Register check boxes for new menu requests.
3. In the Portal Registry group box, select *one* check box to specify where the request(s) are to be registered.

   The Portal Registry region displays the folder structure of the portal. The structure is based on the root folder and its child folders (subfolders).

   a. To view the contents of a child folder, click a Child Folder arrow.

   b. To drill down in a child folder, select a registry item, then click .

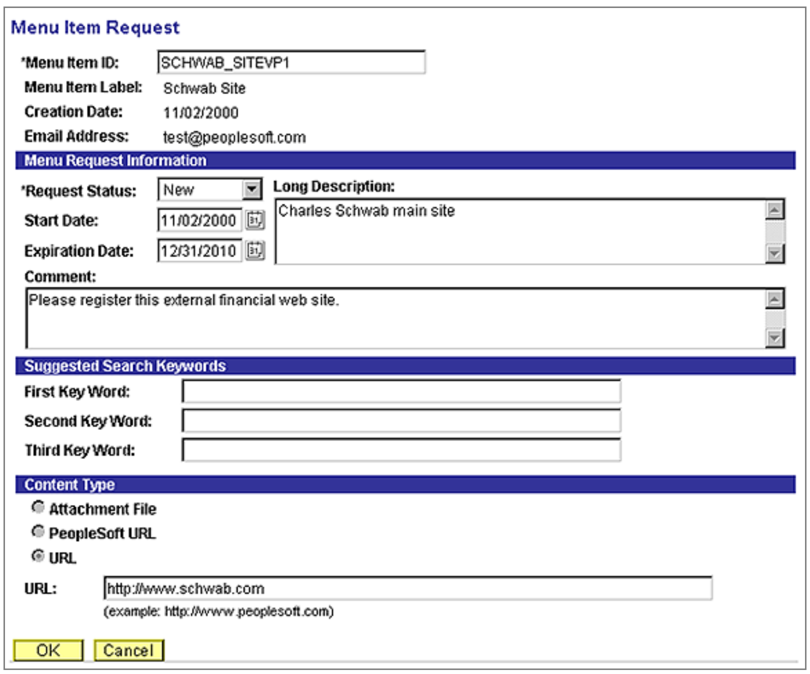
   c. To drill up in the registry, click .

d. To register menu items in the *root* directory, select the Root check box. To register menu items in a child folder, click the desired child folder arrow, and then select a check box next to the desired registry location.

4. Click the Register Menu Items button to register the request.

Changing Menu Item Status

Usage	Use the Menu Item Request page to change a menu item's status.
Object Name	EO_PE_STG_SEC
Navigation	Click the Details link on the Manage Menu Items page.
Access Requirements	Portal administrator only.



Menu Item Request page

The **Menu Item ID, Menu Item Label, Creation Date,** and **Email Address** appear at the top of the page.

Menu Request Information

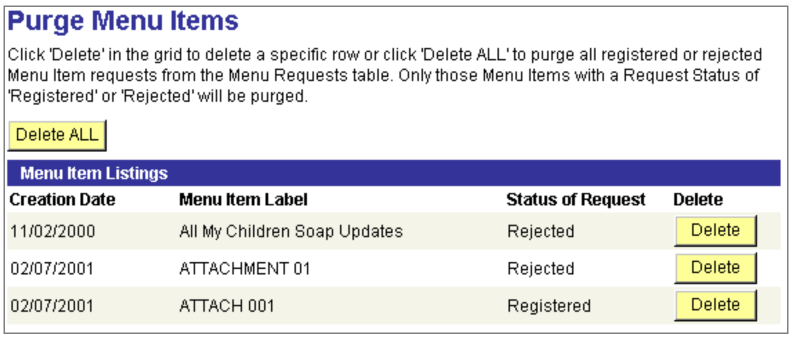
Request Status	Select ***Approved, Rejected,*** or ***Rework*** from the drop-down list box.
Start Date	If the start date is later than today, enter a future date, or click the calendar icon to select a future date

	.The start date is the first day on which you would like the menu item to be available on the portal (for example, 12/01/2000).
Expiration Date	Enter an expiration date, or click the calendar icon to select a date. This date is the *last* day on which you would like the menu item to be available on the portal (for example, 12/31/2000).
Long Description	Enter a longer description of the request, if necessary.
Comment	If appropriate, enter an explanation for the status assignment.
First Key Word, Second Key Word, Third Key Word	In the **Suggested Search Keywords** group box, you can enter keywords that will help users find the menu item at a later date.
Content type	In the **Content Type** group box, select the type of menu item that you are submitting**: Attachment File, PeopleSoft URL,** or **URL.**
Attachment File	1. Click **Add.** 2. Enter the location, or click **Browse** to locate the file. 3. Click **Upload** to upload the file to a staging area. For more information, see Working with File Attachments.
PeopleSoft URL	The **PeopleSoft URL** is a request to register a PeopleSoft application page created in PeopleTools Application Designer. 1. Select a market. For example, GBL (global). 2. Enter a menu name. For example, DEFINE_GENERAL_OPTIONS. 3. Enter a component name. For example, EO_PE_INSTALLATION.
URL	Enter the address in the **URL** text box. Use the format given in the example on the page: http://www.peoplesoft.com

When a request receives a status change of ***Registered, Rework,*** or ***Rejected,*** an email containing the status change is sent to the menu requestor.

Purge Menu Items Page

Usage	The portal administrator can use the Purge Menu Items page to remove registered and rejected requests from the Menu Request Listings.
Object Name	EO_PE_REQTBL_PURGE
Navigation	**Home, Portal Administration, Menu Items, Purge Menu Items**



Purge Menu Items page

Creation Date An auto-generated field that displays the date the request was created.

Menu Item Label An auto-generated field that displays the name of the menu item.

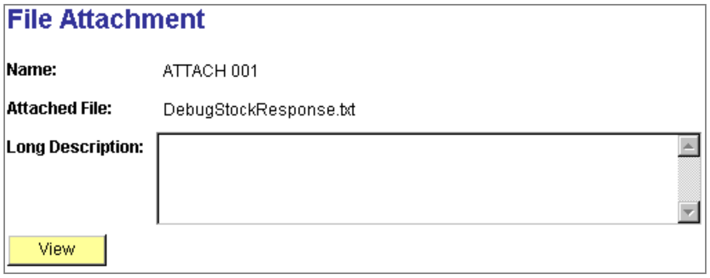
Status of Request An auto-generated field that displays the status of the request.

Click to delete the associated row.

Click to delete all menu items in the listing.

Working with File Attachments

Usage	Use the File Attachment page to view information about the attachment and to view the file itself.
Object Name	EO_PE_VIEW_ATTACH
Navigation	The location of the file attachment is determined by the portal administrator at the time of registration.



File Attachment page

Name Then name of the file attachment menu item.

Attached File The name of the attached file.

Long Description The long description of the menu item.

Click to view the file attachment in a new browser window.

If desired, print the attachment and/or select Save As from the browser File menu to save the attachment to your local drive.

CHAPTER 11

Understanding the Saved Searches Pagelet

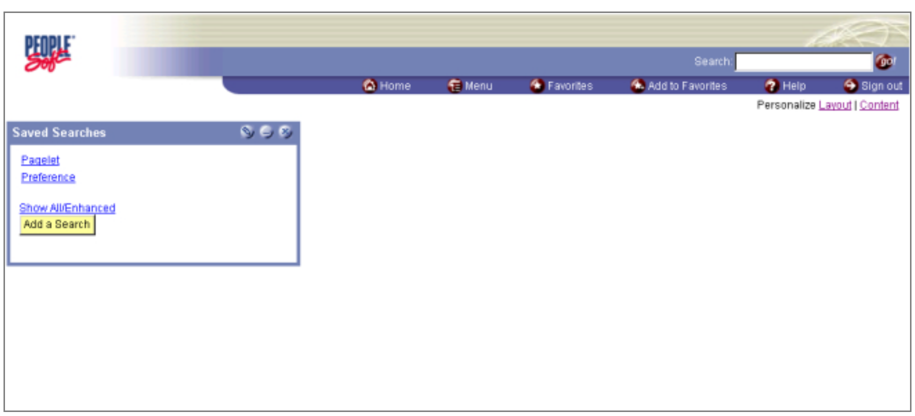
Using a search engine to find information is a popular method of portal navigation. With the Saved Searches pagelet, you can save the search keywords that you run frequently as saved search titles. When you click a title, the search engine searches through the content of the portal registry for entries that match the keyword.

In addition, the Saved Searches pagelet enables you to display your list of saved searches and add, edit, or delete the saved search titles.

This chapter is for two audiences: the portal user and the system administrator. Most of the chapter contains information for the portal user—that is, anyone who is interested in learning about and using the Saved Searches pagelet. The final section, “Administrative Setup,” discusses how to implement the Saved Searches pagelet and is intended for the portal’s system administrator.

Looking at the Saved Searches Pagelet

As the following screen illustration shows, the Saved Searches pagelet appears as a box-like object in the portal.



Saved Searches pagelet displayed in the portal

The Saved Searches pagelet consists of the following:

Click the **Customize** button to access the Personalize Saved Searches page, where you can select the number of saved searches to display on the pagelet.

Click the **Minimize** button to minimize the pagelet area.

Click the **Remove** button to remove the pagelet from the homepage.

Show All/Enhanced

Click the **Show All/Enhanced** link to see all of your saved searches. Saved searches are stored in alphabetical order.

Add a Search

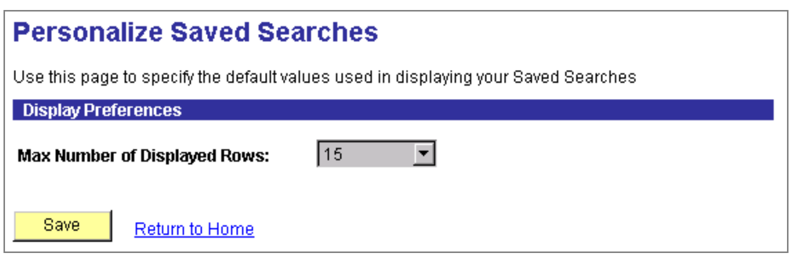
Click the **Add a Search** button to access the Saved Search Details page, where you can add a new saved search item or edit an existing one.

Saved Search Title

Click one of your saved search titles to invoke the search.

Setting Your Preferences

Usage	Use the Personalize Saved Searches page to change the display settings on the Saved Searches pagelet. Display settings can be adjusted with predefined user preferences.
Object Name	EO_PE_SRCHSV_PREF
Navigation	To access the Personalize Saved Searches page, click the Customize button in the title bar on the Saved Searches pagelet.



Personalize Saved Searches page

Max Number of Displayed Rows (maximum number of displayed rows)

Use this field to specify the total number of rows to be displayed. You can select ***5, 10, 15, 20,*** or ***25*** rows. If you don't select a value, all rows appear.

Click the **Save** button to save your preferences.

Return to Home

Click the **Return to Home** link to return to the homepage.

Viewing Your Saved Searches

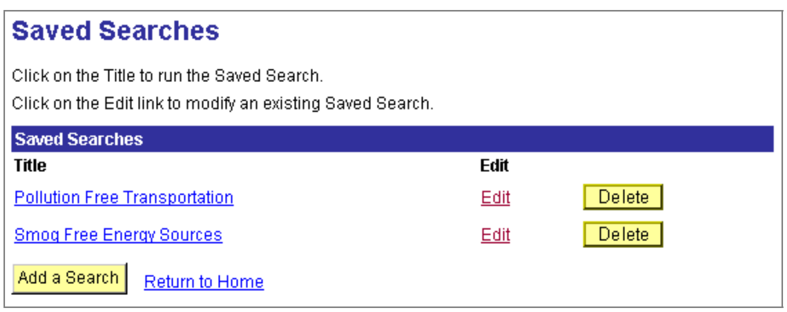
The number of saved search items shown on the homepage is determined as follows:

- If you didn't specify a preference on the Personalize Saved Searches page, all saved searches appear. Your saved search items are then sorted and displayed alphanumerically.
- If you've set your preference to limit the number of saved search items displayed, the saved search items are alphanumerically sorted in ascending order and only the first *n* items appear.

In addition, the Show All/Enhanced link appears when there are saved search items available. When you click this link, a summary of all saved searches appears. The Show All/Enhanced link does not appear if saved search items have not been saved.

Saved Searches Page: Enhanced Version

Usage	Use the enhanced version of the Saved Searches page to obtain a summary of all saved searches regardless of the limits set on the Personalize Saved Searches page. You can view all saved searches, run a saved search, and add, edit, or delete saved search items.
Object Name	EO_PE_SRCHSV_LIST
Navigation	To access the enhanced version of the Saved Searches page, click the Show/All Enhanced link on the Saved Searches pagelet.



Saved Searches page (enhanced version)

Title In each row, the saved search title appears as a link. Click the **Title** to activate the search.

Edit Click the **Edit** link to access the Saved Searches Detail page, where you can view the search keywords associated with the saved search item.

Delete Click the **Delete** button to delete the saved search item. The Delete Confirmation page then appears; click the Yes button to delete the saved search item from the database.

Add a Search Click the **Add a Search** button to access the Saved Searches Details page.

Saved Searches Detail Page

Usage	Use the Saved Searches Detail page to view or add the Saved Search title or keywords.
Object Name	EO_PE_SRCHSV_DTL
Navigation	Click the Add a Search button on the Saved Searches pagelet or Saved Searches page (enhanced version) to access this page.

Saved Searches Detail page

Title Enter the name of the saved search in the **Title** field. The saved search title is required.

Search Tips Click the **Search Tips** link to access a page that shows additional search criteria hints.

Search Keywords In the **Search Keywords** field, enter the keywords for the search. You can separate multiple keywords with a space and use quotation marks to search for a multiword phrase.

Click the **Save** button to save your entries.

Return to Home Click the **Return to Home** link to return to the homepage.

Configuring Administrative Setup for the Saved Searches

This section is for the portal administrator. It describes the tasks required for the pagelet's configuration and setup.

The content administrator should complete the following tasks:

- Ensure that the following pages are registered in the portal registry with a registered HTML template such as HOMEPAGE_DESIGNER_TEMPLATE, or any HTML (Hypertext Markup Language) template:
  - The enhanced version of the Saved Searches.
  - The Saved Search Details page.
  - The Personalize Saved Searches page.

  Do not register these pages with a frame template. Using an HTML template ensures that the proxy is automatic and the Return to Home link works.

- Enable public or permission list security for all registered content references.

In addition, the Saved Search link will work only when you install the Verity search engine and create the Search index.

For more information about how to create the search index catalog, see Building and Using Portal Search Indexes in the *PeopleTools Portal Technology PeopleBook.* For more information about the installation of the Verity search engine, see the *PeopleTools Installation and Upgrade PeopleBook.* For more information about creating additional search collection indices, refer to Building and Using Enterprise Portal Search Indexes in the *PeopleSoft Portals Application Fundamentals PeopleBook.*

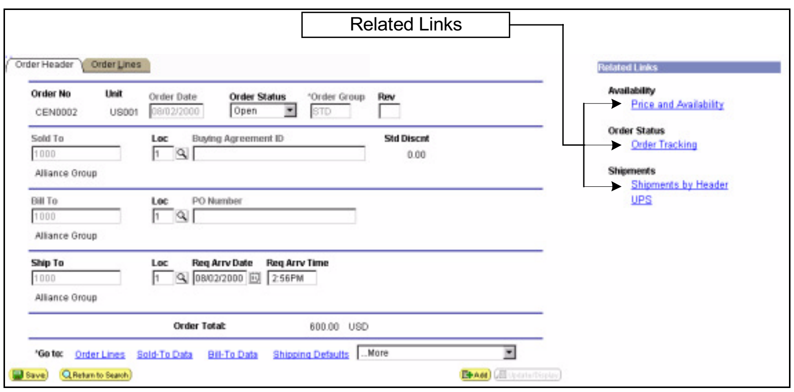
CHAPTER 12

Understanding Related Links

As you navigate through the portal, you'll sometimes encounter a page with links to other pages that feature related information. You can use these links to jump to the associated sites. As a result, related links extend your navigation to other reference sources with one click.

This chapter discusses how to use related links templates and is intended for developers and portal registry administrators.

Links to related information appear alongside the target page when the page is viewed in the portal. For example, in the illustration below the related links for a sales order entry page appear on the right side of the target page. These related links enable users to navigate to the UPS page or to information about pricing and availability.



Sales Order Header Page with related links

Using Related Links

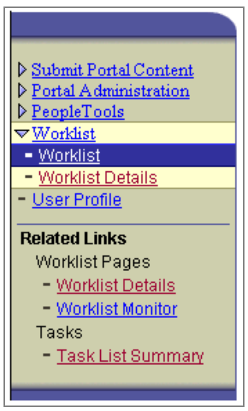
Related links appear for those target pages that fulfill the following criteria:

- The target page is registered as a content reference in the Portal registry.
- The target page's content reference uses a template that allows the display of related link information.
- The target page's content reference contains related link URL information.
- The user accessing the target page has permission to see at least one of the related links listed in the target page's content reference.

Related Link Templates

How the related links appear depends upon the related links template used for the target page in the Portal registry. PeopleSoft delivers two distinct templates that permit the display of related link information: PORTAL_RELATEDLINKS and PORTALLEFTNAVIGATION. Both of these templates display groups of Uniform Resource Locators (URLs) that are relevant to the target page. The template PORTAL_RELATEDLINK displays the related links in an information box to the right of the target page. The template PORTALLEFTNAVIGATION displays the related links beneath the Menu Navigation to the left of the target page.

When a user selects the target page, the system retrieves the related link template and the target page's associated related link information and displays them as hyperlinks. The system displays only those related links for which the user has access. If no related links are associated with the target page or the user does not have access to any of the related links associated with the target page, then the related links section of the template is hidden.



Sample display of the navigation menu and related links section of the PORTALLEFTNAVIGATION template

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In the PORTALLEFTNAVIGATION template, the menu navigation is always visible next to the target page, even if the related links section of the template does not appear.

This section describes how to implement the related link templates for an application page. The implementation consists of the following tasks:

- Accessing and modifying, if necessary, the related link template.
- Registering templates within the portal.

Accessing Related Link Templates

The following steps enable you to examine the HTML templates and create your own related link templates if needed. We recommend that you use the standard RELATEDLINK_TEMPLATE template where possible; you should create your own version of this template only if the GUI (graphical user interface) must differ from the delivered one. If you do create your own related link template for your applications, we suggest that you add your product line or product abbreviation as a suffix to the standard template name (for example, RELATEDLINK_xx, where xx is the product abbreviation).

You must have access to Application Designer to open the related link templates.

To examine HTML objects:

1. Launch PeopleTools and open Application Designer within your target page's database.
2. Select File, Open Object, HTML Object, Name “PORTAL_SELF_FRAME_DYN”.

   An HTML object for the related link template appears:

```
<html>

<head>

<title></title>

<meta http-equiv="Content-Type" content="text/html; charset=iso-8859-1">

</head>


<frameset rows="144,*">

   <FRAME name=UniversalHeader frameborder = no noresize src=>

      <IClientComponent Name="UniversalNavigation">

         <Source
Product="Portal">ICType=Script&amp;ICScriptProgramName=WEBLIB_PORTAL.PORTAL_HEAD
ER.FieldFormula.IScript_UniHeader_Frame&amp;isFrame=true</Source>

      </IClientComponent>

   <frameset cols="75%,*" frameborder="NO" border="0" framespacing="0" rows="*">

      <FRAME name=TargetContent  frameborder = no noresize src=>

         <TargetContent>X</TargetContent>

      <frame name="RELATED LINKS" scrolling="YES" src=>

         <iclientcomponent name="Related Links">

            <source
product="Portal">ICType=Panel&Menu=PORTAL_ADMIN&Market=GBL&PanelGroupName=PORTAL
_RLNK_1COL&target=relatedlinks</source>

         </iclientcomponent>
```

```
   </frameset>

   </frameset>

<noframes><body bgcolor="#FFFFFF">

</body></noframes>

</html>
```

The HTML section that starts with <iclientcomponent name="Related Links”> is the logic to call the component PORTAL_RLNK_1COL (the one-column wide component that displays the related groups and URLs). The section is placed directly after the target content’s display for the RELATEDLINKS_TEMPLATE template, so the related links appear to the right side of the Target Content’s display.

To create your own template that is similar to the related link templates:

1. Save the PORTAL_SELF_FRAME_DYN HTML object with a new name in Application Designer.

   Add your product line or product suffix to the end of the template name if it's a variation of those templates (for example, RELATEDLINK_xx_AP).

2. Save the WEBLIB_PORTAL.PORTAL_DYN_TEMP record FieldFormula Peoplecode Function Iscript_Portal_Self_Dyn in a new record/field of your own choosing in Application Designer.

   The iScript generates the HTML for the object created in the step above.

3. Create a component within your application database.

   For example, create a PeopleSoft component that displays the related links in the format in which you need them for your Web page. As a basis, you may want to clone the delivered components and pages PORTAL_RLNK_1COL or PORTAL_RLNK_3COL. Then adjust your cloned version to fix your needs. The delivered components are in the menu PORTAL_ADMIN. They can be found under the menu item labels “Tran Self Service Template” or “Tran Expert Template.” These components contain the pages used to display the Related Link URLs. The PORTAL_RLNK_1COL component allows for display of the Related Link URLs on the right side of the target page. The PORTAL_RLNK_3COL component allows for display of the Related Links URLs at the bottom of the target page.

   In addition to the Related Link display component and page, you need to create records and PeopleCode. Again, you may want to clone the delivered records and PeopleCode associated with the PORTAL_RLNK_1COL or PORTAL_RLNK_3COL components and pages. Then adjust your cloned records and code to fit your needs. Be aware that the delivered PORTAL_RLNK_1COL or PORTAL_RLNK_3COL pages share the same records and PeopleCode. Changing the code for one page affects the other page as well.

4. Add your new component to a menu.

5. Open your new HTML related link object created in step 1 in Application Designer. Find the following section:

```
<iclientcomponent name="Your Related Links">

            <source product="Your
Portal">ICType=Panel&Menu=YOUR_MENU_NAME&Market=GBL&PanelGroupName=YOUR_PANELGRO
UP_NAME&target="Your Related Links Frame Name"</source>

         </iclientcomponent>
```

6. Replace the data with your new related link title, portal name, menu name, and component name.

7. Save your HTML related Link object.

8. Open your new record/field PeopleCode containing the IScript_Portal_Self_Dyn and modify it to call your new HTML related link object name.

9. Save your new record/field PeopleCode and exit Application Designer.

10. Grant security to your new IScript and pages in Maintain Security, Permission lists, Web Libraries or Pages.

For more information about granting permission list security to Web libraries and pages, refer to Working with Permission Lists in the *PeopleTools Security PeopleBook.*

Registering Templates Within the Portal

Once you have created your own templates, you must add them to the portal registry before you can use them. The RELATEDLINK_TEMPLATE and the PORTALLEFTNAVIGATION template are already registered in the Portal.

To register your template within the portal registry:

1. Launch your browser and log on to your portal database.

2. From the Menu pagelet, click Portal Administration.

3. Click Structure and Content.

4. Click Base Portal Data in the Folders section of the Structure and Content page.

5. Click Templates in the Folders section of the Structure and Content page.

6. Click Add Content Reference in the Content Reference section of the Structure and Content page.

7. Enter the name, label, and long description.

8. For Usage Type, select *Frame Template.*

9. For Storage Type, select *Remote by URL.*

10. For URL Type, select *PeopleSoft Script.*

11. For Record (Table) Name, enter your new record (for example, WEBLIB_PORTAL).

12. For Fieldname, enter your field name *PORTAL_DYN_TEMP.*

13. For PeopleCode Event Name, *FieldFormula* is the default value.

14. For PeopleCode Function name, enter your new PeopleCode Function name (for example, *Iscript_Portal_Self_Dyn*).

15. Click the Content Reference Security Tab.

16. Select the Access Type of *Public.*

17. Click Save.

Your template is now registered as a dynamic, frame-based template.

Related Link URLs

Related link URLs can be PeopleSoft internal links, such as iPages, or iScripts. In addition, they can also be external URLs, such as external web sites or intranet pages. Both, however, are grouped by related group labels in whatever order the application developer or customer sees fit. For example, a stock option target page could appear with a related group of brokerages associated with it. In this case, the target page would display the links to the web sites of Charles Schwab, Etrade, or any of the preferred partners that the organization has selected to exercise stock options.

Likewise, the sales order entry page within Order Management could have related links to show order status, product availability, or shipping status, as well as links to the Fed Ex or UPS sites, where users can look up tracking information for those carriers. Any combination of internal or external links can be included as related links.

The internal related links can be located in the same or different databases from the portal database or target page database. For example, suppose your portal database, PA (Portal Solutions) is separate from your ERP (Enterprise Resource Planning) and HRMS (Human Resources Management System) databases. Suppose you want to allow a target page (Annual Review) located in the HRMS database to display related links for the HRMS database (Absence History page), the ERP database (Expense Reporting page), and the PA database (Worklist page). All of these pages should be registered in the Portal database (PA) as Content References. This means that you would have registry entries for each of the pages as follows:

- An entry for Annual Review with the content provider “HRMS.” The Content Reference for this target page must specify one of the related link templates as its Template Name, and must list each of the other pages as related links.

For more information, refer to Adding Related Links to a Content Reference.

- An entry for Absence History with the content provider “HRMS.”
- An entry for Expense Reporting with the content provider “ERP.”
- An entry for Worklist with the content provider “Portal.”

Securing Related Links

Security access to a related link is given by registering the related link as a separate content reference and assigning permission list(s) to it. If a related link is not separately registered, then it is treated as having a *Public* access type. A *Public* access type does not enforce any *Portal* security. (Security outside the Portal may still be encountered; that is, users will not be able to successfully access PeopleSoft components for which they have not been granted security using PeopleTools, Maintain Security.)

Adding Related Links to a Content Reference

This section describes how to add Related Links to a content reference target page. This entails entering the related link groups and individual related links that should appear for a target page. You need to identify the following data:

- The portal registry location (that is, the parent folder and content reference name) for the target page for which you want to add related links.
- The Label names for each of the related groups used to organize the related links (for example, Brokerages, Benefits Providers).
- The list of internal or external related links that should appear under each related link group.
- The displayed label name for each related link URL (for example, Item Definition, Charles Schwab).
- The content provider for each related link. (This only applies if the related link content reference is registered and contains a specified content provider.)
- The Related Link URL value.
  - For Related Links that are iPages, the Related Link URL is a URL QueryString. The menu, market, and component names of the target page determine the QueryString value. This value has the following format

```
ICType=Panel&Menu=<menuname>&Market=<marketname>&PanelGroupName=<componentna
me>
```

For example, if the Menu is DEFINE_GENERAL_OPTIONS, the Market is GBL, and the Component is COUNTRY_DEFN, then the Related Link URL is as follows.

```
ICType=Panel&Menu=DEFINE_GENERAL_OPTIONS&Market=GBL&PanelGroupName=COUNTRY_D
EFN
```

- For non-registered external URLs, and registered external URLs without a specified Content Provider, the Related Link URL is the absolute URL (for example, the http://www.schwab.com).
- For registered external URLs with a specified Content Provider, the Related Link URL is the remaining portion of the absolute URL not specified by the Content Provider.

For example, if the absolute URL is http://peoplesoft.com/hrms/benefits/401k.html, and the content provider's portal URL text is http://peoplesoft.com/hrms/, then the related link URL will be benefits/401k.html.

Every content reference entry can optionally associate one or more attributes in a Name/Value format. The special attribute name RELLINK is used to specify that this attribute is to be used for related links. The related link group labels, URL labels, the content provider, and the URLs are saved as the content reference attribute value. The attribute value is a long character string that stores the related link group label, URL labels, content provider, and URLs in an XML-type format with start and ending field tags surrounding the actual data values.

When you edit a related link attribute value, a special page appears to enable you to enter related link information. As a result, the system generates the appropriate XML-formatted string and stores it as the attribute value for the RELLINK attribute name.

An XML-type format is used to store the RELLINK information to simplify parsing the string into its individual elements. It's not a true XML format, and no Document Type Definitions (DTDs) are provided. The data is stored in a format similar to XML: the starting and ending tags enable the data values to be easily determined and provide great flexibility if the structure needs to change in the future.

The order in which the related groups were entered on the content reference page is kept on the related link display. However, when URLs are displayed with the target content page, the URLs that are entered within a related group are sorted in ascending order based on the URL label.

You must have access to the Portal Administration Component to access Content Registry.

To add related links:

1. Launch your browser and log on to the portal database.
2. From the Menu Pagelet, click Portal Administration.

3. Click Structure and Content.

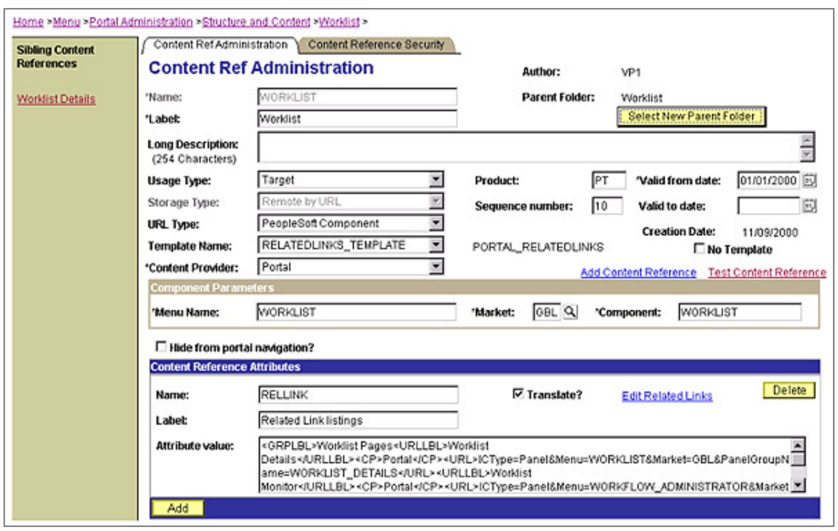
4. In the Folders section of the Structure and Content page, navigate through the folder hierarchy to the folder that contains the target page to which you want to add Related Links.

If your target page is not registered in the portal, select the Folder where you want it to reside. Click Add Content Reference. On the Content Ref Administration page, add the name, label, description, usage type, and so on to register the page.

For more information about registering target pages as content references, see Using Portal Administration Features in the *PeopleTools Portal Technology PeopleBook.*

---

5. Click the Edit link for the Content Reference target page that will contain the Related Links. The Content Ref Administration page appears.



Content Ref Administration page

6. In the Content Ref Administration page, change the Template Name to a template that allows display of Related links. This will be PORTALLEFTNAVIGATION, RELATEDLINKS_TEMPLATE, or your own newly created Related Link template.

The Template Name field for the target page's content reference can be left blank and Related Links will still appear if the higher level default template is a template that allows for the display of Related Links. The system associates a template with a target page by looking first at the target page's content reference. If this value is blank, the system uses the default template specified for the target page's Content Provider. If the target page's Content Provider's default template is blank, then the system uses the default template specified for the Portal Definition. The default templates for the Content Provider and Portal Definition are set in Portal Administration, General Settings.

---

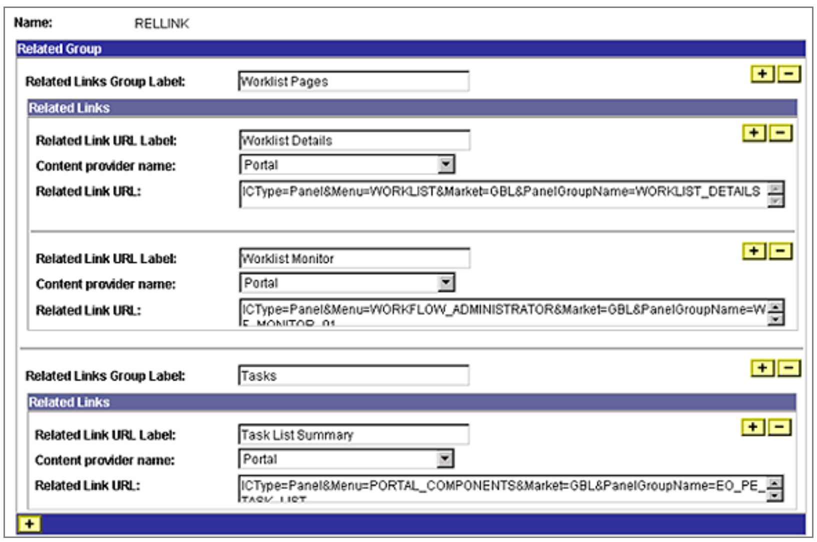
7. In the Content Reference Attributes section of the Content Ref Administration page, enter *RELLINK* in the Name field.

8. Tab out of the Name field. The text link that displayed *Attribute Information* should now display *Edit Related links.*

9. Make sure the Translate? Field is selected for the *RELLINK* attribute.

10. Enter an attribute label.

11. Click Edit Related Links. The Related Link page appears.



Related Link page

12. Enter the first related group label, the first URL's content provider, the URL label, and the URL.

Enter a content provider only if the related Link URL is registered in the portal with a specified content provider. If an external related link is not registered in the portal or does not have a content provider, leave the content provider field blank.

---

13. Click  to insert another URL row, if you have multiple URLs for this first related group.

14. If you have more than one related group that should appear for the target page, click the  button in the Related Group group box to insert additional related group rows.

15. Enter the first URL's information for the new related group. Repeatedly click the  button if you need additional URLs for the related group.

16. Click the OK button when you've finished with each related group.

17. The Content Ref Administration page appears with an XML-type formatted string in the Attributes Value field.

The generated XML-type formatted string contains all the related link data and stores it in the PORTAL_ATTR_VAL field of the PSPRSMATTRVAL record for this content reference specified by the PORTAL_OBJNAME. The following code shows an example of the generated XML-type formatted string.

```
<GRPLBL>Worklist Pages<URLLBL>Worklist
Details</URLLBL><CP>Portal</CP><URL>ICType=Panel&Menu=WORKLIST&Market=GBL&PanelG
roupName=WORKLIST_DETAILS</URL><URLLBL>Worklist
Monitor</URLLBL><CP>Portal</CP><URL>ICType=Panel&Menu=WORKFLOW_ADMINISTRATOR&Mar
ket=GBL&PanelGroupName=WF_MONITOR_01</URL></GRPLBL><GRPLBL>Tasks<URLLBL>Task
List
Summary</URLLBL><CP>Portal</CP><URL>ICType=Panel&Menu=PORTAL_COMPONENTS&Market=G
BL&PanelGroupName=EO_PE_TASK_LIST</URL></GRPLBL>
```

18. Click Save to retain your added Related Links.
19. Click Test Content Reference to view how the page will appear to users through normal navigation. The Content Reference page appears as a target page. The target page is wrapped in the Related Links template that you specified for this page.
20. Click on each of the hyperlinks under the templates Related Link section. Make sure that each Related Link URL takes you to the correct destination. Use the browser's back button to test successive links.
21. To test the display of this Content Reference page from the normal navigation, click Menu, then navigate through the menu hierarchy to this Content Reference target page.

Only those Related Link URLs that the user has security access to are displayed alongside the target page. Security access to a Related Link URL is given by registering the Related Link URL as a separate content reference and associating permission list(s) to it. If the related link is not separately registered, then it is treated as having a *Public* access type. If a Related Link Group has no URLs underneath it to which the user has security access, the Related Link Group is hidden. If the user does not have access to any of the related links associated with the target page, then the related links section of the template is hidden.

Troubleshooting Related Links

If your target page does not display any related links, here are some things to check:

Q. Are the application and portal databases registered as content providers?

Check for data entry errors.

Q. Are the templates registered in Application Designer with the correct names?

If not, register the templates. Check for data entry errors.

Q. Is the related link template name that is specified for the target page correct?

Check whether the PORTAL_TEMPL_NAME value in PSPRSMDEFN displays a correct related link template.

Q. Was the RELLINK string saved on the target page in the content registry?

Check to determine that an XML string appears in the RELLINK attribute value field. Delete and Re-add the RELLINK attribute for all the Related Link information.

Q. Did you assign security in the registry to the user for the content references listed as Related Link URLs?

If not, assign security using the Content Reference Security tab in the Content Reference Administration page for registered Related Link URL.

C H A P T E R 1 3

Creating Web Magazines

Web Magazine is an online publishing feature. It enables non-technical users to create and publish collections of content—such as a department newsletter, a policy handbook, or even a mini-website—through a graphical format. As a result, Web Magazine provides a way to communicate information to people in the organization who have access to the PeopleSoft portal. Moreover, you can easily update and distribute web-based information. Moving communications from printed materials to web publications greatly reduces printing costs without sacrificing graphical quality.

Web Magazine includes the Web Magazines pagelet, which displays a list of publications. The pagelet includes access to back issues. When the user makes a selection, a colorful cover page appears and displays the navigational links to the magazine's content.

Web Magazine provides the following features:

- Content is stored and managed separately from the page presentation layout. Web objects such as text and images can be reused, updated, or retired to provide a real-time, dynamic web publication using HTML templates.
- The content components are stored in an easy-to-manage centralized repository right within a PeopleSoft portal database.
- Presentation templates can be customized to suit any type of web page. Templates for the front cover page, sections, and article pages come pre-delivered to give you a quick start.

Web Magazines Pagelet

The Web Magazines pagelet lists all current and historical issues under a publication heading. Issues are sorted according to the issue's effective date in descending order. It does not list all back issues. It lists a maximum of 5 issues by default and can be customized by altering the iScript PeopleCode.

Web Magazines pagelet

If no issues exist for a publication, the text *No Issues* appears.

For this release, only a single publication is supported.

Cover Page

The cover page is the first page that you see after navigating to the publication. Think of this as the main menu for the publication. This page is your main navigation point to the rest of the publication.

As the following screen illustration shows, common features of the cover page include the title bar and the publication navigation bar. You can click links on the cover page to access other parts of the publication.

Cover page

Setting Up Your Web Magazine

Information Hierarchy

Web Magazine presents information in a hierarchy at the following levels:

- Publication
- Issue
- Section
- Category
- Article

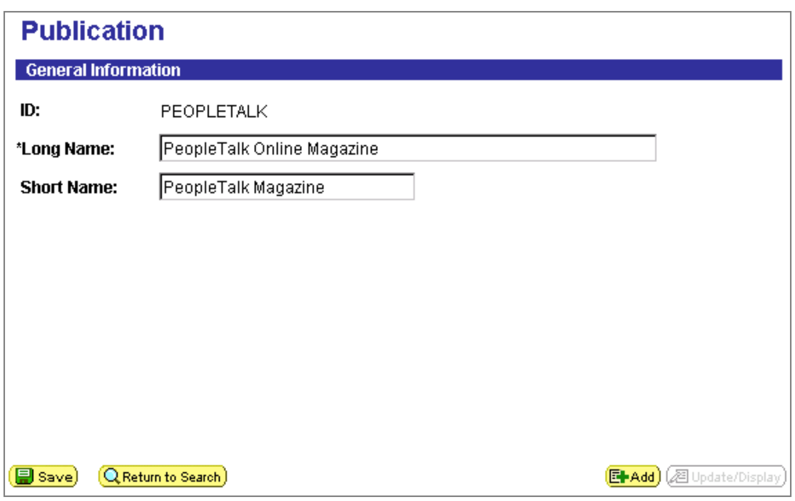
For example, New York Times is a publication, Nov2000 is an issue, Sports is a section, and Golf is a category. Within the Golf category, an article might be titled "Woods Brings Star Power To Golf." Within this framework, you can organize information to suit most any type of need.

We can also see the hierarchy in the previous screen illustration of the cover page. The hierarchy consists of the following items:

- The cover page template for the PeopleTalk Online *publication*.
- The June - August 2000 *issue.*
- The Industry *section* as shown within the cover page.
- The Manufacturing *category* as shown within the Industry section.
- The JPM Company Aces Quick Response to Customers *article* link as shown within the Manufacturing category.

Setting Up a Publication

Usage	Use the Publication page to add or update information for a publication.
Object Name	EO_PE_PUBWP
Navigation	**Home, Menu, Portal Administration, Pagelet Administration, Web Magazine, Publications**
Prerequisites	None
Access Requirements	Click the Add a New Value link and enter a publication ID (for example: *Health*). Then click Add.



Publication page

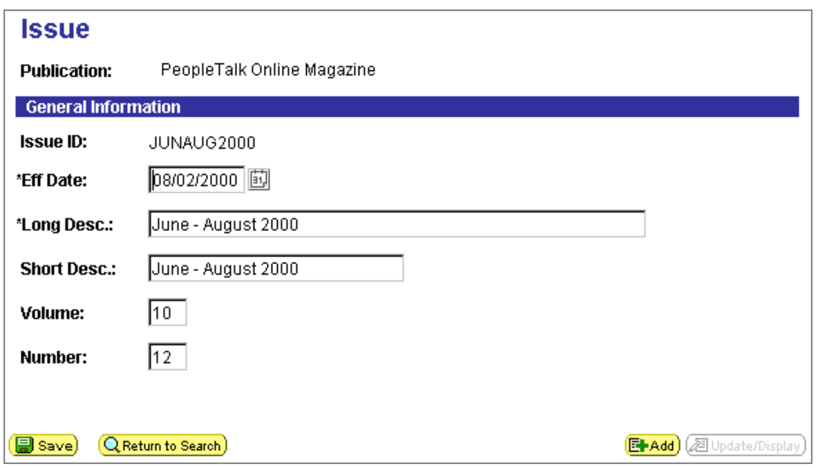
ID The publication ID appears.

Long Name Enter the long name for the publication. For example: *Health and Fitness World Online.*

Short Name Enter the short name for the publication. For example: *Health Online.*

Adding an Issue

Usage	Use the Issue page to add or edit information about an issue of a publication.
Object Name	EO_PE_ISSUEWP
Navigation	**Home, Menu, Portal Administration, Pagelet Administration, Web Magazine, Issues**
Prerequisites	None
Access Requirements	Click Add a New Value and enter the publication ID of the publication to which you want to add an issue (for example: *PEOPLETALK*). Enter an issue ID (for example: *JULYAUG2000*). Then click Add.



Issue page

Publication The title of the publication appears.

Issue ID Displays the **Issue ID** that you entered.

Effective Date Enter the date when the issue will be effective. Note that an issue will not appear in the web publishing pagelet if this value is greater than the current system date.

Long Name Enter the issue's long name (for example: *June – August 2000*).

Short Name	Enter the issue's short name (for example: *June – August 2000*).
Volume	Enter a volume number. Currently informational data.
Number	Enter a sequence number. Currently informational data.

Specifying the Number of Back Issues

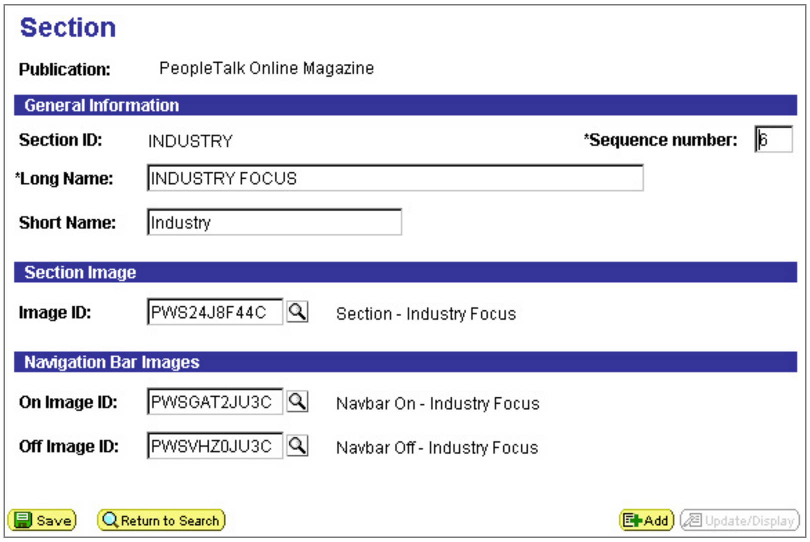
You can use Application Designer to specify the number of back issues that will appear in the pagelet.

To specify the number of back issues to appear:

1. Modify the function Iscript_BuildWPPagelet( ) in WEBLIB_WEBPUB.EO_PE_PUB.FieldFormula.
2. Scan for all occurrences of &RowMax and set it to the number you desire. For this release, you can display a maximum of five issues for each publication.

Establishing a Section

Usage	Use the Section page to add or edit information about a section of a publication.
Object Name	EO_PE_SECTIONWP
Navigation	**Home, Menu, Portal Administration, Pagelet Administration, Web Magazine, Sections**
Prerequisites	None
Access Requirements	Click Add a New Value and enter the publication ID for the publication to which you want to add a section (for example: *PEOPLETALK*). Enter a section ID (for example: *INDUSTRY*). Click Add.



Section page

Publication — The title of the publication appears.

Section ID — The section ID appears.

Sequence number — Enter the sequence number in this field. The sequence number designates the placement of the section within the publication. For the first section, the sequence number would be ***1.*** For the second section, the sequence number would be ***2,*** and so on.

Long Name — Enter the section's long name. For example***: INDUSTRY FOCUS.***

Short Name — Enter the section's short name. For example: ***Industry.***

Image ID — Enter the section's **Image ID.** The Web Magazine templates use this ID to reference the section image.

For more information about the Image ID, see Maintaining Graphic Images.

 — Click this button to search for an **Image ID.**

On Image ID — Enter the Section Navigation Bar **On Image ID.** This ID is for an image that appears in the section navigation bar when the user is in a particular section.

 — Click this button to search for an **Image ID.**

Off Image ID — Enter the section navigation bar **Off Image ID.** This ID is for an image that appears in the section navigation bar when the user is not in a particular section.

 — Click this button to search for an **Off Image ID**.

Creating a Category

Usage	Use the Category page to create and store all the information for a category of a publication.
Object Name	EO_PE_CATEGORYWP
Navigation	**Home, Menu, Portal Administration, Pagelet Administration, Web Magazine, Categories**
Prerequisites	None
Access Requirements	Click Add a New Value and enter the publication ID for the publication to which you want to add a category (for example: *PEOPLETALK*). Enter a section ID (for example: *INDUSTRY*). Enter a category ID (for example: *COMMUNICATE*). Click Add.

Category page

Publication The title of the publication appears.

Section The name of the section appears.

ID The publication ID appears.

Long Name Enter the long name of the category. For example: ***Communications.***

Short Name Enter the short name of the category. For example: ***Communicate.***

Category Image ID Enter the **Category Image ID.** When you specify an ID, the category image appears in the Web Magazine templates.

 Click this button to search for a **Category Image ID.**

Defining Security

Web Magazine offers three types of security:

1. *iClient* security: security for the administrative pages (pages on which you enter the publication's information, such as issue, category, and article information).
2. Web magazine pagelet security: security for the actual viewing of a magazine from the portal.
3. *iScript* security: security for the Web Library function calls, which construct the HTML pages that assemble the templates, content, and images.

Pagelet Administration

Administrative security involves the access rights to the setup pages—pages that you use to enter basic information about the structure of your Web Magazine. Administrative security also grants access to the content creation pages. You should grant access to these pages only to the individuals who will be manage and enter content for the publications.

Currently there is no security to allow users to access only certain publications, or for users to be able to edit only their own data within the Web Magazine. Workflow and extra setup pages may be added in the future to add this level of security.

To set up pagelet administration security:

1. Log on to the iClient.
2. Select the PeopleTools menu.
3. Select the Maintain Security menu.
4. Select the Use menu.
5. Select the Permissions Lists menu.
6. Open the appropriate Permission List.
7. Select the Pages tab.
8. Navigate to the menu with the menu name ADMINISTER_WEBPUBLISHING.
9. Click the Edit Components link located by the ADMINISTER_WEBPUBLISHING menu name.
10. Select the Components that you want the Permission List to have access to. Grant the setup pages to your publication administrators and the article creation pages to your content contributors.
11. Click Save.

12. Repeat the process for all other Permission Lists to be granted access to pagelet administration security.

Magazine Viewing Security

Pagelet security refers to the security that enables users of the portal to view the rendered Web Magazine within the portal. Access to the pagelet is established in the portal registry.

To set up pagelet and magazine viewing security with content registry security:

1. Select Portal Administration, Structure and Content menu, Base Portal Data, Pagelets, News.
2. Select the Edit link that corresponds to Web Magazine.
3. Select the Content Reference Security tab.

   The Content Reference Security page appears.
4. Select *Public* if there is no restriction on accessing the Web Magazine pagelet.
5. If you want to grant access selectively to the Web Magazine pagelet, then select *Permission List* and select the appropriate permission lists.

Setting Up Web Library Security

The foundation of the Web magazine display rests on a combination of the HTML template code (stored in a PeopleTools HTML object) and iScript (stored in a Web Library on the WEBLIB_WEBPUB record). The iScript incorporates bind variables to affiliate your specific content into its appropriate location in an HTML template. You must grant security to the Web Library object.

To set up Web Library security:

1. Select the PeopleTools menu.
2. Select the Maintain Security menu.
3. Select the Use menu.
4. Select the Permissions Lists menu.
5. Open the Permission List to which you want to grant access.
6. Select the Web Libraries tab.
7. Navigate to the Web Library Name WEBLIB_WEBPUB.

8. Click the Edit link located by the WEBLIB_WEBPUB library name.

9. Click the Full Access (All) button.

10. Click Save.

11. It is likely that you have multiple Permission Lists needing access to the WEBLIB_WEBPUB. Repeat the process for all other Permission Lists needing access to web magazine security.

You could create a single permission list called Pagelets and grant it access to all the WebLibs that support any pagelet. Then you can add this permission list to all the security roles that need access to any pagelet. By doing this, you can control access to each pagelet by designating only permission lists in the content registry security. The creation of this general pagelet permission list keeps you from having to manage pagelet security in two areas: content registry security for the pagelet and security administration for the web libraries.

Creating and Publishing Content

Maintaining Graphic Images

Usage	Use the Image page to add or edit information about a graphic image used by the publication.
Object Name	EO_PE_IMGWP
Navigation	**Home, Menu, Portal Administration, Pagelet Administration, Web Magazine, Images**
Prerequisites	None
Access Requirements	Click the Add a New Value link and enter an image ID in the Image ID field. Then click the Add button.

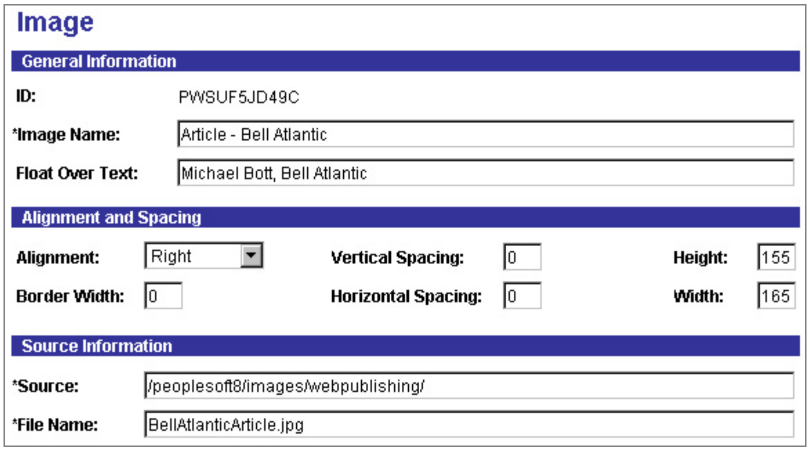


Image page (1 of 2)

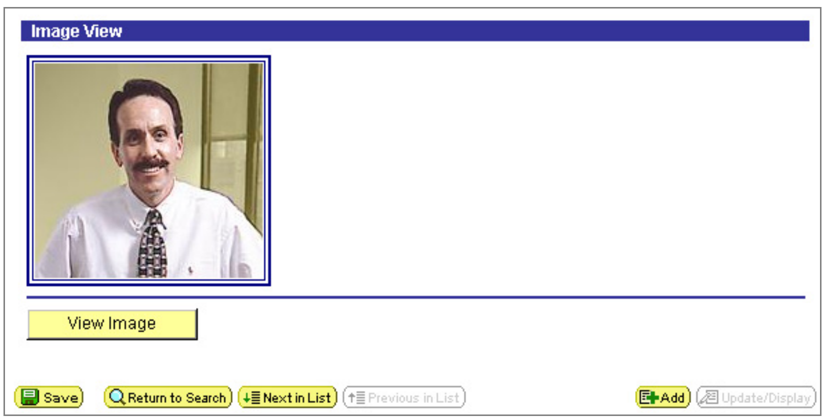
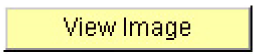


Image page (2 of 2)

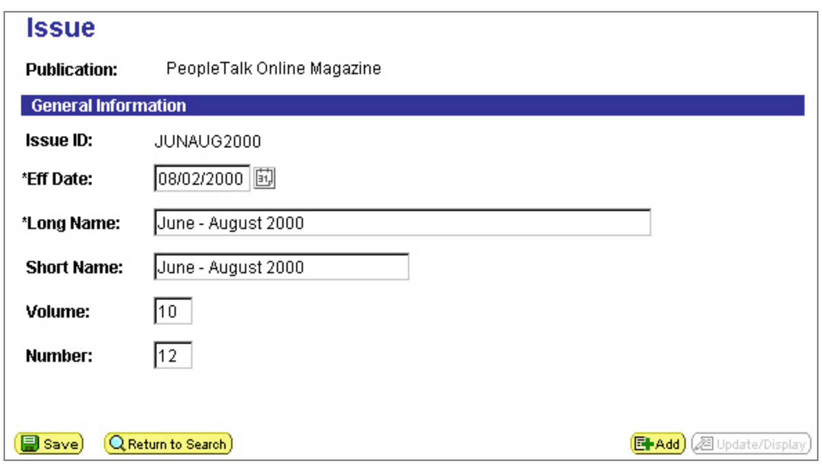
The Image page is where you define the data. You manually add the image to the web server directory that is specified in the source field.

ID	The **ID** appears.
Image Name	Enter the name of the image.
Float Over Text	Enter the image **Float Over Text.** This text appears when the user places the cursor over the image.
Alignment	Click the arrow of this drop-down list box to select one of the following values for the image alignment: ***Absbottom, Absmiddle, Baseline, Bottom, Left, Middle, Right, Textop, Top.*** The value that you select specifies the alignment position of the image.
Vertical Spacing	Enter the number of pixels on the top and bottom of the image for vertical spacing.
Height	Enter the number of pixels for the image height.

Border Width	Enter the number of pixels for the image border width.
Horizontal Spacing	Enter the number of pixels on the left and right of the image for horizontal spacing.
Width	Enter the number of pixels for the image width.
Source	Enter the image's relative path on the web server where the image file is located.
File Name	Enter the image's file name.
	Click the **View Image** button to display the image.
	Click the **Save** button to save your entries.

Maintaining an Issue

Usage	Use the Issue page to add and maintain information for an issue of a publication.
Object Name	EO_PE_ISSUEWP
Navigation	**Home, Menu, Portal Administration, Pagelet Administration, Web Magazine, Issue**
Prerequisites	None
Access Requirements	Click the Add a New Value link. Enter a publication ID and an issue ID in the corresponding fields. Then click the Add button.



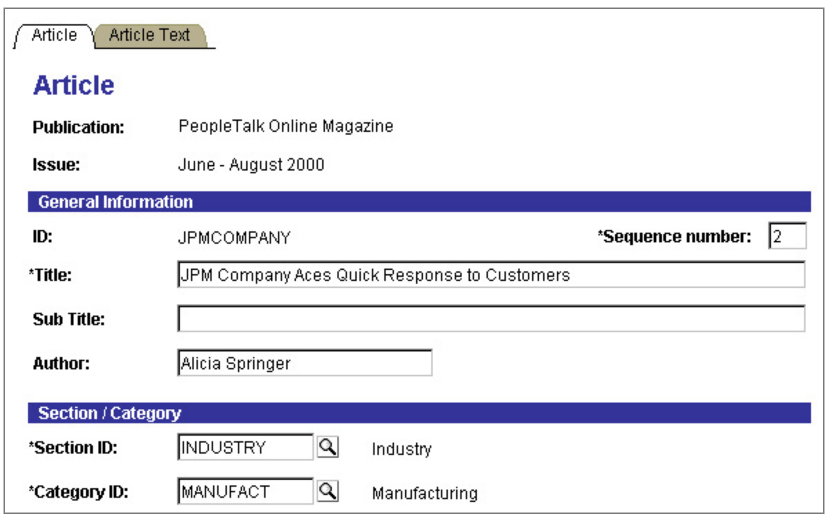
Issue page

Publication	The title of the publication appears.
Issue ID	The ID of the issue appears.

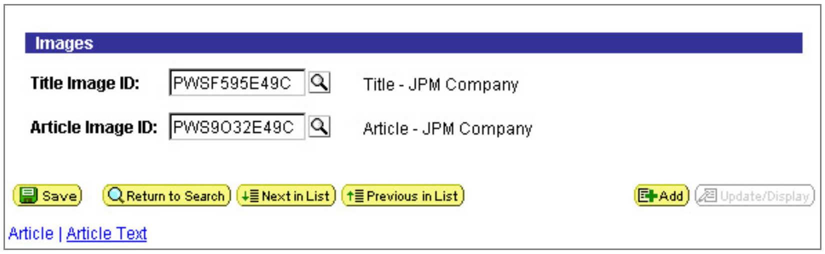
Eff Date	Enter the effective date of the issue, or click to select a date from the calendar.
Long Name	Enter the long name of the issue.
Short Name	Enter the short name of the issue.
Volume	Enter the volume number of the issue.
Number	Enter the issue number.

Setting Up Articles

Usage	Use the Article page to add and maintain information about an article.
Object Name	EO_PE_ARTICLEWP1
Navigation	**Home, Menu, Portal Administration, Pagelet Administration, Web Magazine, Articles**
Prerequisites	None
Access Requirements	Click the Add a New Value link. Enter a publication ID, an issue ID, and an article ID in the corresponding fields. Then click the Add button.



Article page (1 of 2)

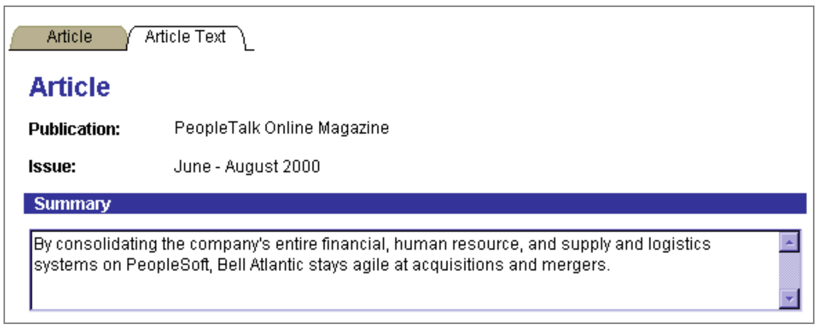


Article page (2 of 2)

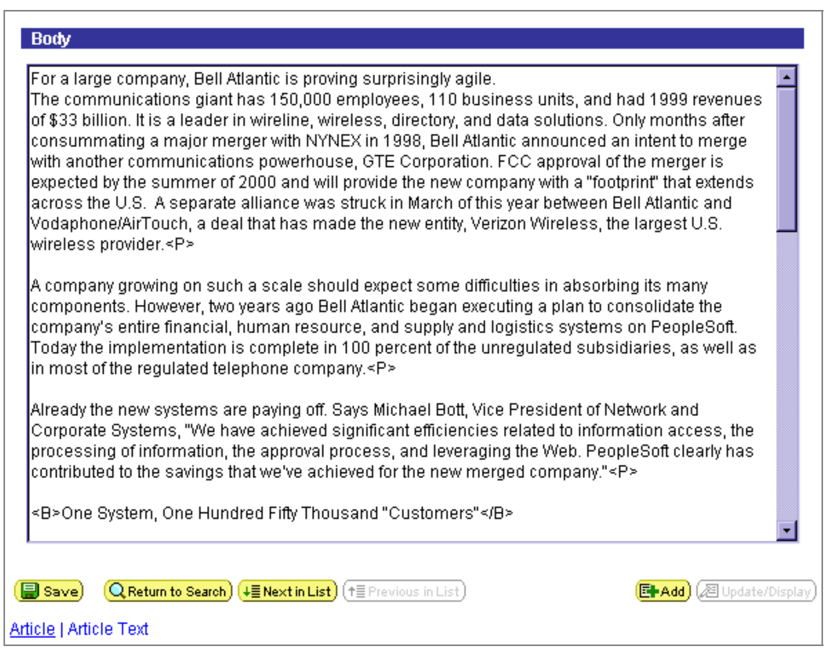
Article (tab)	Click this tab to access the Article page.
Article Text (tab)	Click this tab to view the text of the article.
Publication	The title of the publication appears.
Issue	The issue of the publication appears.
ID	The article **ID** appears.
Sequence number	Enter the article sequence number to specify the order in which you want the article to appear within the section.
Title	Enter the article title.
Sub Title	Enter the article subtitle.
Author	Enter the name of the article author.
Section ID	Enter a section ID, or click to search for and select an ID.
Category ID	Enter the category ID, or click to search for and select an ID.
Title Image ID	Enter the article's **Title Image ID,** or click to search for and select an ID. When you specify an ID, it is stored for future use with the Web Magazine templates.
Article Image ID	Enter the **Article Image ID,** or click to search for and select an ID. When you specify an ID, it is stored for future use with the Web Magazine templates.
Article	As the link from the Article Text page to the Article page, the **Article** link is not active when you are viewing the Article page.
Article Text	Click this link to view the article text.

Viewing the Article's Text

Usage	Use the Article Text page to view the text of the article. You can also edit the text from this page.
Object Name	EO_PE_ARTICLEWP2
Navigation	Click the Article Text tab from the Article page.
Prerequisites	None
Access Requirements	None



Article Text page (1 of 2)



Article Text page (2 of 2)

Summary	The article's summary text appears.
Body	The full article, in plain text or HTML format, appears.

Article	Click the **Article** link to return to the Article page.
Article Text	As the link from the Article page to the Article Text page, the **Article Text** link is not active when you are viewing the article's text.

Creating Your Own Custom Templates

Before you create your own custom templates for a new magazine, or to change the look of an existing magazine, review Displaying Web Magazines: An Overview. This chapter provides a thorough understanding of how templates work.

Constructing a Cover Page Web Magazine Template

To construct a cover page Web Magazine template:

1. Design the template in HTML markup.

   Before creating a template, decide on the page design, then break it up into table cells. The following screen illustration shows how the PeopleTalk Cover page has been structured.

Web page layout

Code example:

```
<HTML>

<HEAD>

<TITLE> PeopleTalk: Home Page </TITLE>
```

```
</HEAD>

<BODY LEFTMARGIN="0" TOPMARGIN="0" MARGINWIDTH="0" MARGINHEIGHT="0">

<TABLE BORDER="1" CELLPADDING="0" CELLSPACING="0" WIDTH="760">

<!-- Header -->
<TR>
<TD height=34>
%BIND(:1)
</TD>
</TR>

<!-- Navigation Bar 1 -->
<TR>
<TD height=25 bgcolor=gray>
%BIND(:2)
</TD>
</TR>
</Table>

(code deleted)

<table border="0" cellpadding="0" cellspacing="0" width="760">
<tr>
<td valign="bottom">
<!-- <a href="/en/new/peopletalk/jun2000/ceo/index.html"> -->
<IMG SRC="/peoplesoft8/images/webpublishing/PWSYBONQO8C.gif" ALT="Mark Hoffman"
width="155" height="217" ALIGN="top" border="0" hspace="0" >
<!-- </a>-->
```

```
</td>



<td valign="top" bgcolor="#C6E39E">

       <table border="0" cellpadding="0" cellspacing="0" width="166">

              <tr valign="top">

              <td>

                      <a
href="%BIND(:6)?ICType=Script&ICScriptProgramName=WEBLIB_WEBPUB.EO_PE_TEMPLATES.
FieldFormula.IScript_SectionArticleTemplate&PUB=PEOPLETALK&ISSUE=%BIND(:7)&SECTI
ON=NEWS">

                      <img
src="/peoplesoft8/images/webpublishing/PWS5JA6S59C.gif" width="56" height="35"
vspace="0" hspace="3" border="0">

                      </a>

              </td>

              </tr>



              <tr valign="top">

              <td>

                   %BIND(:3)

              </td>

              </tr>

         </table>

</td>



<td valign="top" bgcolor="#FFFFCC">

     <a
href="%BIND(:6)?ICType=Script&ICScriptProgramName=WEBLIB_WEBPUB.EO_PE_TEMPLATES.
FieldFormula.IScript_SectionArticleTemplate&PUB=PEOPLETALK&ISSUE=%BIND(:7)&SECTI
ON=INDUSTRY">

     <IMG SRC="/peoplesoft8/images/webpublishing/PWS24J8F44C.gif" ALT="Industry
Focus" width="439" height="32" ALIGN="top" border="0" hspace="0"
vspace="Variables.ivspace">

     </a>
```

```
     <table width="100%" border="0" cellspacing="5" cellpadding="0">
         <tr valign="top">
         <font face="Arial, Helvetica, sans-serif" size="1" color="#000066">
         <td>
                   %BIND(:4)
         </td>
         </font>
         </tr>
    </table>

</td>
</tr>
</table>

<!-- Footer -->
<TABLE BORDER="1" CELLPADDING="0" CELLSPACING="0" WIDTH="760">
<TR>
<TD>
%BIND(:5)
</TD>
</TR>
</TABLE>

</BODY>
</HTML>
```

2. Place this HTML code within an HTML object in PeopleTools and save the object.

For more information about how to create an HTML object, refer to Creating HTML Definitions in the *Application Designer PeopleBook.*

---

3. Add the appropriate BIND parameters to each cell in the HTML Object for your template. This is shown in the following screen illustration.

BIND parameters

4. Save the HTML object in PeopleTools.

5. Open the record WEBLIB_WEBPUB in PeopleTools.

6. Navigate to the record PeopleCode for the field EO_PE_TEMPLATES.

   You need to edit this PeopleCode for your specific needs.

7. Call functions to get the values for the Bind Variables.

   Under the function IScript_WebPublishing, add the appropriate functions to bind values to the values you have set up in your HTML object (the cover page template). In our example, let's show how to bind a value to the fourth bind variable. The fourth bind variable in the article template represents the articles for the Section *INDUSTRY*. A function is delivered with Web Magazine to get the article listing for a Section. This function is called IScript_GetSectionArticles.

   From the PeopleCode in IScript_WebPublishing, call the function IScript_GetSectionArticles and set it to a string variable. In our example, we'll set the return value of the function to the variable &IndustryFocus.

   Example:

```
rem;

rem    Get the Articles for the INDUSTRY;

rem;

rem    Parameters Values for the Function Call;
```

```
rem     Number     Description          Value
rem     ---------- ------------------- ---------
rem     1          Number of Columns    3
rem     2          FontSize             1
rem     3          Section Title On     0 (FALSE)
rem     4          Category Title On    1 (TRUE)
rem     5          ArticleSummary On    0 (FALSE)
rem     6          More... On           0 (FALSE)
rem     7          Section Name         "INDUSTRY"
rem;
&IndustryFocus = IScript_GetSectionArticles(3, 1, 0, 1, 0, 0, "INDUSTRY");
```

8. Bind function values to the HTML object/cover page template.

Specifically, bind &IndustryFocus into our HTML object (cover page template). This is done with the function GetHTMLText.

This function will take our HTML object (cover page template), which was saved as EO_PE_FRONTPAGETEMPLATE, and bind into it the six bind values. These values must occur in the order that they were specified in the HTML object. The variable &IndustryFocus is listed fourth because it's the fourth bind variable.

Example:

```
&HTMLText = GetHTMLText(HTML.EO_PE_FRONTPAGETEMPLATE, &HTMLHeader, &HTMLNav1,
&CompanyNews, &IndustryFocus, &HTMLFooter, &FullURI);
```

9. Include the Cover Page Template within the portal.

In our template, this is how the Industry Section article listing appears within the Cover Page template. You'll notice that the article listing now appears within the fourth bind variable of the template.

Industry article section as shown within the cover page template

10. Repeat the process and bind additional cells within the HTML object/Cover Page Template.

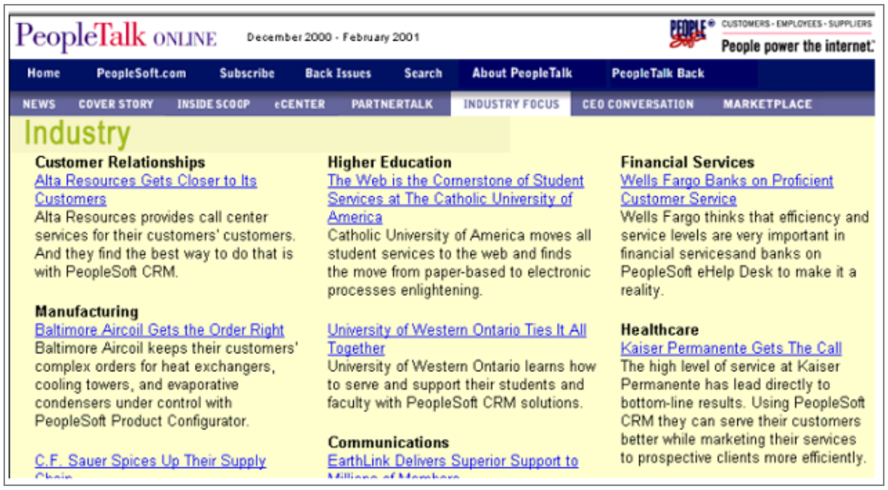
For each bind value, you can add a function, another HTML object, or static text or images. Continue until all the cells of the HTML object have values. When you've finished, the page should appear as the following PeopleTalk page.

A PeopleTalk page

Section Page Layout

You use the section page layout to display the articles within a particular section of the publication. On the section page, the title bar and navigation bar appear with the section navigation bar.

You can use the section navigation bar to access all of the sections within the publication. In the following screen illustration, the navigation bar appears only on the section page and on the article page. However, it can also be placed on the cover page layout.



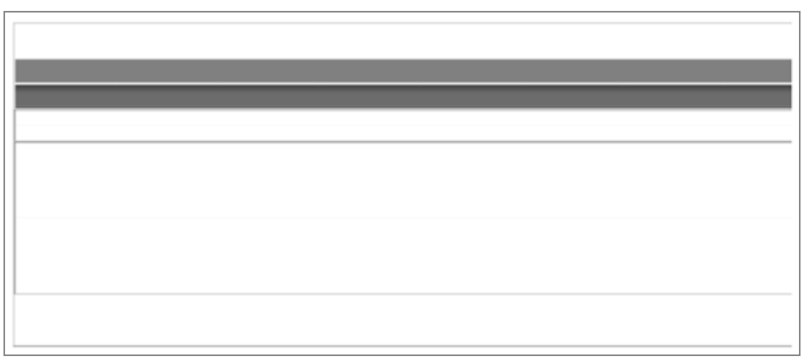
Section page with section navigator bar

Constructing a Section Web Magazine Template

To construct a Section Web Magazine template:

1. Design the template in HTML markup.

   Before creating the template, decide on the page design and break it up into table cells. The following picture shows how the PeopleTalk Section page has been structured.

   Layout of PeopleTalk Section page

   Code example:

```
<HTML>

<HEAD>
```

```
<TITLE> PeopleTalk: Section Page </TITLE>

</HEAD>

<BODY LEFTMARGIN="0" TOPMARGIN="0" MARGINWIDTH="0" MARGINHEIGHT="0">


<TABLE BORDER="0" CELLPADDING="0" CELLSPACING="0" WIDTH="760">


<!-- Header -->

<TR>

<TD>

%BIND(:1)

</TD>

</TR>


<!-- Navigation Bar 1 -->

<TR>

<TD>

%BIND(:2)

</TD>

</TR>


<!-- Navigation Bar 2 -->

<TR>

<TD BACKGROUND="/peoplesoft8/images/webpublishing/PWSA19OE85C.gif">

%BIND(:3)

</TD>

</TR>


<!-- Section Image -->

<TR>
```

```
<TD>
       <TABLE BORDER="0" CELLPADDING="0" CELLSPACING="0" WIDTH="760"
BGCOLOR="#FFFFCC">
       <TR>
       <TD class="bodytext">
       %BIND(:4)
       </TD>
       </TR>
       </TABLE>
</TD>
</TR>

<!-- Section Articles -->
<TR>
<TD>
       <TABLE class="bodytext" BORDER="0" CELLPADDING="0" CELLSPACING="0"
WIDTH="760" BGCOLOR="#FFFFCC">
       <TR>
       <TD>
       %BIND(:5)
       </font>
       </TD>
       </TR>
       </TABLE>
</TD>
</TR>
<!-- Footer -->
<TR>
<TD>
%BIND(:6)
```

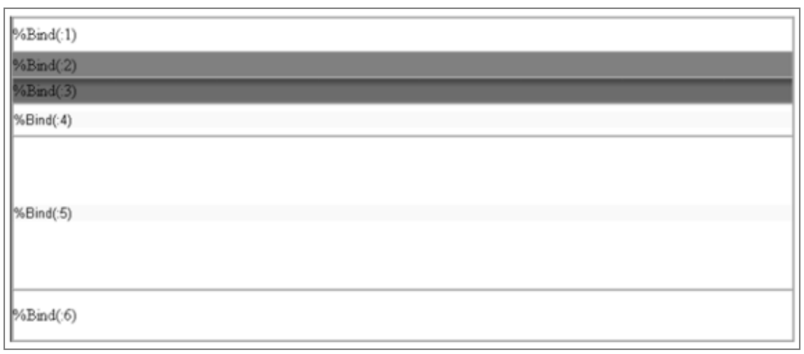
```
</TD>

</TR>


</TABLE>


</BODY>

</HTML>
```

2. Place this HTML code within an HTML object in PeopleTools.

For more information about how to create an HTML object, refer to the chapter Creating HTML Definitions in the *Application Designer PeopleBook.*

---

3. Add the appropriate BIND parameters to each cell in the HTML Object for your template. This is shown in the following image.



BIND parameters

4. Save the HTML object in PeopleTools.

5. Open the record WEBLIB_WEBPUB in PeopleTools.

6. Navigate to the record PeopleCode for the field EO_PE_TEMPLATES.

   You need to edit the PeopleCode for your specific needs.

7. Call functions to get the values for the BIND variables.

   Under the function IScript_SectionArticleTemplate, add the appropriate functions to bind values to the values that you have set up in your HTML object (the article template). In our example, let's show how to bind a value to the fifth bind variable. The fifth cell in the article template represents an article listing for all articles within the section. A function is included with Web Magazine that gets all the articles for a section. This function is called IScript_GetSectionArticles.

From the PeopleCode in IScript_SectionArticleTemplate, call the function IScript_GetSectionArticles and set it to a string variable. In our example, we will set the return value of the function to the variable &HTMLBody.

For more information about IScript_GetSectionArticles, refer to "Displaying Web Magazines: An Overview".

Example:

```
rem;

rem    Get the Articles for the DEFAULT;

rem;

rem    Parameters Values for the Function Call;

rem    Number            Description          Value;

rem    ----------        -------------------  ---------;

rem    1          Number of Columns    3;

rem    2          FontSize             2;

rem    3          Section Title On     0 (FALSE);

rem    4          Category Title On    1 (TRUE);

rem    5          ArticleSummary On    1 (TRUE);

rem    6          More... On           0 (FALSE);

rem    7          Section Name         "";

rem;

&HTMLBody = IScript_GetSectionArticles(3, 2, 0, 1, 1, 0, "");
```

8. Bind function values to the HTML object/section template.

Bind &HTMLBody into our HTML object (section template). This is done with the function GetHTMLText.

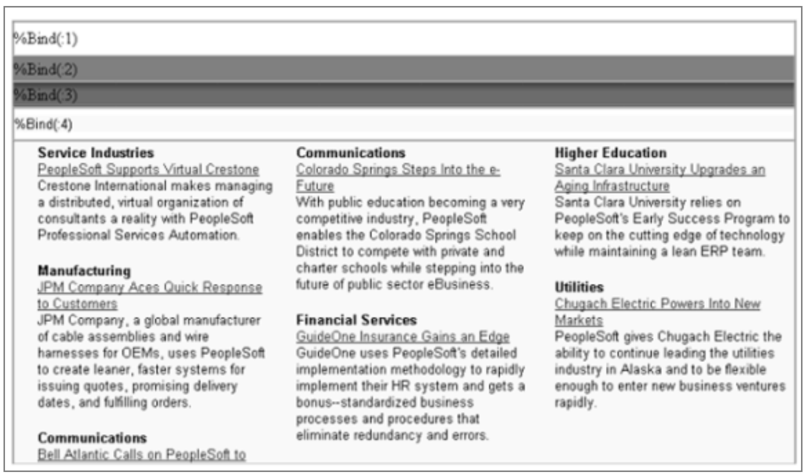
Function GetHTMLText will take our HTML object (section template), which was saved as EO_PE_SECTIONTEMPLATE, and bind into it the six bind values. These values must occur in the order that they were specified in the HTML object. The variable &HTMLBody is listed fifth because it is the fifth bind variable.

Example:

```
rem;

rem    Build The Web Page;

rem;

&HTMLText = GetHTMLText(HTML.EO_PE_SECTIONTEMPLATE, &HTMLHeader, &HTMLNav1,
&HTMLNav2, &HTMLSectionImg, &HTMLBody, &HTMLFooter);
```

9. Section the template within the portal.

In our template, the section articles appear within the Section template, as shown in the following screen illustration. Note that the Section Articles now appear within the fifth cell of the template.



Section articles in the Section template

10. Repeat the process and bind additional cells within the HTML object Section Template.

For each bind value, you can add a function, another HTML object, or static text or images. Continue until all the cells of the HTML object have values. When you've finished, the page should appear as the following PeopleTalk screen illustration.

PeopleTalk

Article Page Layout

You use the article page layout to display an article within the publication. The customer has the freedom to arrange this page as desired. In the following example, the article is shown with a title and a side navigation bar that shows all the articles within this section.

Article page

Constructing an Article Web Magazine Template

To construct an Article Web Magazine template:

1. Design the template in HTML markup.

   Before creating a template, decide on the page design and break it up into table cells. The following picture shows the layout design of the PeopleTalk Article page.

Layout design of the PeopleTalk Article page

Code example:

```
<HTML>

<HEAD>

<TITLE> PeopleTalk: Article Page </TITLE>

</HEAD>


<BODY>


<TABLE BORDER="5" CELLPADDING="0" CELLSPACING="0" WIDTH="760">


<!-- Header -->

<TR>

<TD COLSPAN=2 height="40">

%BIND(:1)

</TD>

</TR>
```

```
<!-- Navigation Bar 1 -->

<TR>

<TD  COLSPAN=2>

%BIND(:2)

</TD>

</TR>


<!-- Navigation Bar 2 -->

<TR>

<TD  COLSPAN=2 BACKGROUND="/peoplesoft8/images/webpublishing/PWSA19OE85C.gif">

%BIND(:3)

</TD>

</TR>


<!-- Category Picture -->

<TR>

<TD WIDTH="140" HEIGHT="130">

%BIND(:4)

</TD>


<!-- Article Title Picture -->

<TD WIDTH="620" height="130">

%BIND(:5)

</TD>

</TR>


<!-- Section Articles Navigation Bar -->

<TR>

<TD WIDTH="140" BGCOLOR="#CCFFCC" VALIGN="TOP">
```

```
%BIND(:6)
</TD>

<!-- Article Body -->
<TD width="620">
        <table width="100%" border="0" cellspacing="0" cellpadding="8">
        <tr>
        <td class="bodytext">
        %BIND(:7)
        </td>
        </tr>
        </table>
</TD>
</TR>

<!-- Footer -->
<TR>
<TD  COLSPAN=2>
%BIND(:8)
</TD>
</TR>

</TABLE>

</BODY>
</HTML>
```

2. Place this HTML code within an HTML object in PeopleTools.

For more information about how to create an HTML object, refer to Creating HTML Definitions in the *Application Designer PeopleBook.*

3. Add the appropriate BIND parameters to each cell in the HTML Object for your template. This is shown in the following image.

BIND parameters

4. Save the HTML object in PeopleTools.

5. Open the record WEBLIB_WEBPUB in PeopleTools.

6. Navigate to the record PeopleCode for the field EO_PE_TEMPLATES.

   You will need to edit this PeopleCode for your specific needs.

7. Call functions to get the values for the Bind Variables.

   Under the function IScript_ArticleTemplate, add the appropriate functions to bind values to the values you have set up in your HTML object (the article template). In our example, we'll bind a value to the fourth bind variable. The fourth cell in the article template represents the category image. The function IScript_GetCategoryImg is delivered with Web Magazine to get the category image.

   From the PeopleCode in IScript_ArticleTemplate, call the function IScript_GetCategoryImg and set it to a string variable. In our example, we will set the return value of the function to the variable &HTMLCategoryImage.

   Example:

```
rem;

rem    Category Image;
```

```
rem;

&HTMLCategoryImage = IScript_GetCategoryImg();
```

8. Bind function values to the HTML object/article template.

Bind &HTMLCategoryImage into our HTML object (article template). This is done with the function GetHTMLText.

This function will take our HTML object (article template), which was saved as EO_PE_ARTICLETEMPLATE, and bind into it the eight bind values. These values must occur in the order they were specified in the HTML object. The variable &HTMLCategoryImage is listed fourth because it is the fourth bind variable.

Example:

```
&HTMLText = GetHTMLText(HTML.EO_PE_ARTICLETEMPLATE, &HTMLHeader, &HTMLNav1,
&HTMLNav2, &HTMLCategoryImage, &HTMLTitle, &HTMLNav3, &HTMLBody, &HTMLFooter);
```

9. Article Template within the portal.

In our template, this is how the category image appears within the Article template. Notice how the category image now appears within the fourth cell of the template.

The category image in the article template

10. Repeat the process and bind additional cells within the HTML object/Article Template.

For each bind value, you can add a function, another HTML object, or static text/images. Continue until all the cells of the HTML object have values. When you're done, the page should appear as the PeopleTalk page previously shown.

CHAPTER 14

Displaying Web Magazines: An Overview

This chapter is a supplement to the chapter Creating Web Magazines. It provides an overview of how the portal displays Web magazines.

Before you can design a publication, it's important to understand how the portal assembles the Web magazine for presentation in the portal. PeopleSoft Portal Solutions delivers a set of page layouts in the form of HTML objects, including built-in functions that use these HTML objects. Any configuration or any creation of new HTML objects would require revision to these built-in functions.

Built-in Function Definitions: Syntax Notation

Throughout this chapter, we use the following typographical conventions to distinguish between different elements of the PeopleCode language:

Item	***Description***
Bold	Boldface items indicate function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
italic	Italic items are placeholders for arguments that your program must supply.
...	Ellipses indicate that the preceding item or series can be repeated any number of times.
{**Option1**|**Option2**}	When there is a choice between two options, the options are enclosed in curly braces and separated by a pipe.
[ ]	Optional items are enclosed in square brackets.
&Parameter	An ampersand before a parameter indicates that the parameter is an already instantiated object.

Publication

IScript_BuildPubHeader

Syntax

```
IScript_BuildPubHeader()
```

Declaration

```
Declare Function IScript_BuildPubHeader PeopleCode EO_PE_PUB FieldFormula;
```

Description

IScript_BuildPubHeader displays the Web Magazine header for a particular publication. It uses the Publication ID and the Issue ID that are passed through the query string. This function then retrieves the current Issue Name using these parameters and displays it within the header. It's displayed by passing the Issue Name as a bind variable to the HTML HeaderTemplate. Different publications must change the code to call their specific HTML template for the header.

Parameters (from Function Call)

None

Parameters (from query string)

Parameters	***Description***
PUB	This is the publication ID. It is set in the query string by PUB=<Publication ID>. This function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Publication.
ISSUE	This is the Issue ID. It is set in the query string by ISSUE=<Issue ID>. This function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Issue.

Parameters (Other)

Parameters	***Description***
HTML.<HTML Template>	This is the required HTML template to display the header for the Web Magazine page. Change this in the code to use the HTML template that you have designed.

Example Call

```
&HTMLHeader = Iscript_BuildPubHeader();
```

Returns

Returns	**Description**
String	Returns the HTML markup for the entire publication/issue header.

IScript_BuildPubNavBar

Syntax

```
IScript_BuildPubNavBar()
```

Declaration

```
Declare Function IScript_BuildPubNavBar PeopleCode EO_PE_PUB FieldFormula;
```

Description

IScript_BuildPubNavBar displays the Web Magazine navigation bar for a particular publication. This function retrieves the HTML template for the navigation bar for the given publication. The inputs are publication, issue name, and full URI from the %Request parameter. Different publications must change the code to call their specific HTML template for the navigation bar.

Parameters (from Function Call)

None

Parameters (from query string)

Parameters	**Description**
PUB	The publication ID. It is set in the query string by PUB=<Publication ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Publication.
ISSUE	The Issue ID. It 's set in the query string by ISSUE=<Issue ID>. This function must have this query string parameter to retrieve the correct values from the database. The value is retrieved in the function and set to the variable &Issue.

Parameters (Other)

Parameters	Description
HTML.<HTML Template>	This is the required HTML template that displays the publication navigation bar for the Web Magazine page. Change this in the code to use the HTML template that you have designed.
URI	Scheme: //host:port/path/ For example: http://localhost8080/servlets/iclientservlet/HR (where HR is a subdirectory)

Example Call

```
&HTMLNav1 = Iscript_BuildPubNavBar();
```

Return Value

Value	Description
String	Returns the HTML markup for the entire publication navigation bar.

IScript_GetSectionArticles

Syntax

```
IScript_GetSectionArticles(&NumberOfColumns, &fontsize, &SectionOn,
&CategoriesOn, &ArticleSummaryOn, &More, &Section)
```

Declaration

```
Declare Function IScript_GetSectionArticles PeopleCode EO_PE_SECTION
FieldFormula;
```

Description

Iscript_GetSectionArticles displays all the articles for a particular section of an issue in a publication. All articles are displayed using the following parameters, and the output of the articles can be changed. Features include the number of columns the articles will be displayed in, the font size, Section Titles On/Off, Category Titles On/Off, Article Summaries On/Off, More Articles link On/Off, and a Section ID override.

Parameters (from Function Call)

Parameters	Description
&NumberOfColumns	Integer. This is the number of columns in which to display the articles. If the number is 3, there will be three columns used to display the articles.

Parameters	Description
&Fontsize	Integer. This is the relative font size for the output to be displayed.
&SectionO	Integer (1 – True, 0 – False). If this value is True (1), the section name appears at the beginning of the article listing. If this value is False(0), the section name is not displayed.
&CategoriesOn	Integer (1 – True, 0 – False). If this value is True (1), the category name appears at the beginning of each article. If this value is False (0), the category name is not displayed.
&ArticleSummaryO	Integer (1 – True, 0 – False). If this value is True (1), the article summary appears after the article title. If this value is False (0), the article summary is not displayed.
&More	Integer (1 – True, 0 – False). If this value is True (1), the text “More…” appears at the end of the article, listing if there are more than three articles. If this value is False (0), the text “More…” is not displayed.
&Section	If a value exists, it overrides the query string parameter value for the section ID. This is also useful if there is no query string parameter for the section ID. The value must be the section ID.

Parameters (from query string)

Parameters	Description
PUB	The publication ID. It's set in the query string by PUB=<Publication ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Publication.
ISSUE	The Issue ID. It's set in the query string by ISSUE=<Issue ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Issue.
SECTION	The Section ID. It is set in the query string by SECTION=<Section ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Section.

Example Call

```
rem Get the Articles for the News Section;

rem Parameters Values for the Function Call;

rem No of Columns - 1;

rem Font Size - 1;

rem Section Title On - 0 (False);
```

```
rem Category Title on – 0 (False);

rem More… link – 0 (False);

rem Section Name – "News";

&CompanyNews = Iscript_GetSectionArticles(1, 1, 0, 0, 0, 1, "News");
```

Return Value

Value	Description
String	Returns the HTML code for all the articles in a particular section (for a publication/issue).

IScript_BuildPubFooter

Syntax

```
IScript_BuildPubFooter( )
```

Declaration

```
Declare Function IScript_BuildPubFooter PeopleCode EO_PE_PUB FieldFormula;
```

Description

IScript_BuildPubFooter displays the Web Magazine footer for a publication. IScript_BuildPubFooter retrieves the HTML template of the footer for the given publication. This is a static HTML template, and does not have any bind variables. For different publications, the code must be changed to call the specific HTML template for the footer.

Parameters (from Function Call)

None

Parameters (from Query String)

None

Parameters (Other)

Parameters	Description
HTML.<HTML Template>	This is the required HTML template that displays the footer for the Web Magazine page. Change the template's code to use the HTML template that you have designed.

Example Call

```
&HTMLFooter = Iscript_BuildPubFooter();
```

Returns

Return	Description
String	Returns the HTML markup for the entire publication footer.

IScript_WebPublishing

Syntax

```
"?ICTYPE=Script&ICScriptProgramName=WEBLIB_WEBPUB.EO_PE_TEMPLATES.FieldFormula.I
Script_WebPublishing"
```

Description

IScript_WebPublishing assembles the Web Magazine for a particular publication issue. It uses the publication built-in functions described previously to produce each value required by the cover page template. It is assembled by passing all required parameters as bind variables to the HTML Front Page Template.

Customized cover page layouts require changes to the code. For example, if the HTML template has six bind variables, IScript_WebPublishing must pass six values (including HTML markup returned by other publication built-in functions) to match. Using some of the examples from the previous sections, we have:

&HTMLText = GetHTMLText(HTML.EO_PE_FRONTPAGETEMPLATE, &HTMLHeader, &HTMLNav1, &CompanyNews, &IndustryFocus, &HTMLFooter, &FullURI)

- EO_PE_FRONTPAGTETEMPLATE is the cover page layout.
- &HTMLHeader, &HTMLNav1, and &HTMLFooter contain the HTML markup for the header, navigation, and footer portion of the layout.
- &CompanyNews contains the HTML markup for all articles for the section News.
- &IndustryFocus contains the HTML markup for all articles for the section Industry.
- &FullURI is the portal URI where the user is currently using.

Example Call

```
<A
HREF=http://host:port/path?ICType=Script&ICScriptProgramName=WEBLIB.WEBPUB.EO_PE
_TEMPLATES.FieldFormula.Iscript_WebPublishing&PUB=PEOPLETALK&ISSUE=JUNGAUG2000>
PeopleTalk </A>
```

Return Value

Return	Description
String	Returns the HTML markup for the entire publication issue.

Section

All the articles for a particular issue are retrieved. All the sections where the articles belong are sorted.

IScript_BuildSectionNavBar

Syntax

```
IScript_BuildSectionNavBar( )
```

Declaration

```
Declare Function IScript_BuildSectionNavBar PeopleCode EO_PE_SECTION
FieldFormula;
```

Description

IScript_BuildSectionNavBar builds the section navigation bar for a particular publication issue. The navigation bar displays all the sections for a publication issue. It's created with the images that are defined in the section navigation on and off images of the application.

If the Current section is the section that is referenced, the Section Navigation Bar On image is used. If the section referenced is not the current section, the Section Navigation Bar Off image is used for that section.

Parameters (from Function Call)

None

Parameters (from query string)

Parameters	Description
PUB	The publication ID. It's set in the query string by PUB=<Publication ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Publication.

Parameters	Description
ISSUE	The Issue ID. It's set in the query string by ISSUE=<Issue ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Issue.
SECTION	The Section ID. It's set in the query string by SECTION=<Section ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Section.

Example Call

```
&HTMLNav2 = IScript_BuildSectionNavBar();
```

Returns

Returns	Description
String	Returns the HTML markup for the entire section navigation bar.

IScript_GetSectionArticles

Syntax

```
IScript_GetSectionArticles(&NumberOfColumns, &fontsize, &SectionOn,
&CategoriesOn, &ArticleSummaryOn, &More, &Section)
```

Declaration

```
Declare Function IScript_GetSectionArticles PeopleCode EO_PE_SECTION
FieldFormula;
```

Description

Iscript_GetSectionArticles displays all the articles for a particular section of an issue in a publication. All the articles are displayed and the use parameters listed in the following table. The output of the articles can be changed.

Features include the number of columns the articles will be displayed in, the font size, Section Titles On/Off, Category Titles On/Off, Article Summaries On/Off, More Articles link On/Off, and a Section ID override.

Parameters (from Function Call)

Parameters	Description
&NumberOfColumns	Integer. This is the number of columns in which to display the articles. If this number is 3, there will be three columns for the articles to be displayed in.
&Fontsize	Integer. This is the relative font size for the output to be displayed.
&SectionO	Integer (1 – True, 0 – False). If the value is True (1), the section name is displayed at the beginning of the article listing. If this value is False (0), the section name is not displayed.
&CategoriesOn	Integer (1 – True, 0 – False). If the value is True (1), the category name is displayed at the beginning of each article. If this value is False (0), the category name is not displayed.
&ArticleSummaryO	Integer (1 – True, 0 – False). If the value is True (1), the article summary is displayed after the article title. If this value is False (0), the article summary is not displayed.
&More	Integer (1 – True, 0 – False). If the value is True (1) and if there are more than 3 articles, the text “More…” is displayed at the end of the article listing. If this value is False (0), the “More…” is not displayed.
&Section	If a value exists here, it overrides the query string parameter value for the section ID. This is also useful if there is no query string parameter for the section ID. This value must be the section ID.

Parameters (from query string)

Parameters	Description
PUB	The publication ID. It's set in the query string by PUB=<Publication ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Publication.
ISSUE	The Issue ID. It's set in the query string by ISSUE=<Issue ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Issue.
SECTION	The Section ID. It is set in the query string by SECTION=<Section ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Section.

Example Call

```
rem Get the Articles for the News Section;

rem Parameters Values for the Function Call;
```

```
rem No of Columns – 1;

rem Font Size – 2;

rem Section Title On – 0 (False);

rem Category Title on – 0 (False);

rem Article Summary On – 1 (True);

rem More… link – 0 (False);

rem Section Name – "" (current section);

&HTMLText = Iscript_GetSectionArticles(1, 2, 0, 0, 1, 0, " ");
```

Return Value

Return	Description
String	Returns the HTML for all the articles in a particular section (for a publication/issue).

IScript_GetSectionImg

Syntax

```
IScript_GetSectionImg( )
```

Declaration

```
Declare Function IScript_GetSectionImg PeopleCode EO_PE_SECTION FieldFormula;
```

Description

IScript_GetSectionImg retrieves the section image for a particular section of a publication. It takes inputs from the query string for the publication ID and section ID. **IScript_GetSectionImg** first retrieves the section image ID. Using this ID, it calls the **IScript_GetImage** function to retrieve the image information.

Parameters (from Function Call)

None

Parameters (from query string)

Parameters	**Description**
PUB	The publication ID. It's set in the query string by PUB=<Publication ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Publication.
SECTION	The section ID. It's set in the query string by SECTION=<Section ID>. The function must have this query string parameter to retrieve the correct values in from the database. This value is retrieved in the function and set to the variable &Section.

Example Call

```
&HTMLSectionImg = IScript_GetSectionImg();
```

Return Value

Return	**Description**
String	Returns the HTML image tag for the section image.

IScript_SectionArticleTemplate

Syntax

```
"?ICTYPE=Script&ICScriptProgramName=WEBLIB_WEBPUB.EO_PE_TEMPLATES.FieldFormula.I
Script_SectionArticleTemplate"
```

Description

IScript_SectionArticleTemplate assembles the section page for a particular publication issue. It uses the section built-in functions described previously to come up with each value required by the section page template. It's assembled by passing all required parameters as bind variables to the HTML Section Page Template.

Changes to the code are required when customizing section page layouts. For example, if the HTML template has six bind variables, IScript_SectionArticleTemplate must pass six values (including HTML markup returned by other section built-in functions) to match. Using some of the examples from the previous sections, we have:

&HTMLText = GetHTMLText(HTML.EO_PE_SECTIONTEMPLATE, &HTMLHeader, &HTMLNav1, &HTMLNav2, &HTMLSectionImg, &HTMLBody, &HTMLFooter)

- EO_PE_SECTIONTEMPLATE is the section page layout
- &HTMLHeader, &HTMLNav1, &HTMLNav2, and &HTMLFooter contain the HTML markup for the header, publication navigation, section navigation, and footer portion of the layout

- &HTMLSectionImg contains the HTML markup for the section image; &HTMLBody contains the HTML markup for all articles for the current section.

You may have a different page layout for every section in a publication. If so, you must edit IScript_SectionArticleTemplate to use the appropriate HTML object (section layout) depending on the publication section.

Example Call

```
<A
HREF=http://host:port/path?ICType=Script&ICScriptProgramName=WEBLIB.WEBPUB.EO_PE
_TEMPLATES.FieldFormula.Iscript_SectionArticleTemplate&PUB=PEOPLETALK&ISSUE=JUNG
AUG2000&Section=News> News </A>
```

Return Value

Return	Description
String	Returns the HTML markup for a section in a publication issue.

Category

IScript_GetCategoryLong Name

Syntax

```
IScript_GetCategoryLongName( )
```

Declaration

```
Declare Function IScript_GetCategoryLongName PeopleCode EO_PE_CATEGORY
FieldFormula;
```

Description

IScript_GetCategoryLongName retrieves the Category Long Name for a particular category in a section of a publication. **IScript_GetCategoryLongName** takes inputs from the query string for the Publication ID, Section ID, and Category ID.

Parameters (from Function Call)

None

Parameters (from query string)

Parameters	Description
PUB	The publication ID. It's set in the query string by PUB=<Publication ID>. The function must have this query string parameter to complete the header. This value is retrieved in the function and set to the variable &Publication.
SECTION	The section ID. It's set in the query string by SECTION=<Section ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Section.
CATEGORY	The category ID. It's set in the query string by CATEGORY=<Category ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Category.

Return Value

Return	Description
String	Returns the Category Long Name.

IScript_GetCategoryImg

Syntax

```
IScript_BuildGetCategoryImg( )
```

Declaration

```
Declare Function IScript_GetCategoryImg PeopleCode EO_PE_CATEGORY FieldFormula;
```

Description

IScript_GetCategoryImg retrieves the Category Image for a particular category in a section of a publication. **IScript_GetCategoryImg** takes inputs from the query string for the Publication ID, Section ID, and Category ID. **IScript_GetCategoryImg** first retrieves the category image ID. Using this ID, it calls the **IScript_GetImage** function to retrieve the image information.

Parameters (from Function Call)

None

Parameters (from query string)

Parameters	Description
PUB	The publication ID. It's set in the query string by PUB=<Publication ID>. The function must have this query string parameter to complete the header. This value is retrieved in the function and set to the variable &Publication.
SECTION	The Section ID. It's set in the query string by SECTION=<Section ID>. The function must have this query string parameter to retrieve the correct values in from the database. This value is retrieved in the function and set to the variable &Section.
CATEGORY	The Category ID. It's set in the query string by CATEGORY=<Category ID>. The function must have this query string parameter to retrieve the correct values in from the database. This value is retrieved in the function and set to the variable &Category.

Return Value

Return	Description
String	Returns the HTML image tag for the category image.

Article

IScript_GetArticleTitle

Syntax

```
IScript_GetArticleTitle( )
```

Declaration

```
Declare Function IScript_GetArticleTitle PeopleCode EO_PE_ARTICLE FieldFormula;
```

Description

IScript_GetArticleTitle retrieves the Article Title for a particular article in an issue of a publication. **IScript_GetArticleTitle** takes inputs from the query string for the publication ID, issue ID, and article ID.

Parameters (from Function Call)

None

Parameters (from query string)

Parameters	Description
PUB	The publication ID. It's set in the query string by PUB=<Publication ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Publication.
ISSUE	The Issue ID. It's set in the query string by ISSUE=<Issue ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Issue.
ARTICLE	The Article ID. It's set in the query string by ARTICLE=<Article ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Article.

Return Value

Return	Description
String	Returns the Article Title.

IScript_GetArticleTitleImage

Syntax

```
IScript_GetArticleTitleImage( )
```

Declaration

```
Declare Function IScript_GetArticleTitleImage PeopleCode EO_PE_ARTICLE
FieldFormula;
```

Description

IScript_GetArticleTitleImage retrieves the Article Title Image for a particular article in a particular issue of a publication. **IScript_GetArticleTitleImage** receives inputs from the query string for the Publication ID, Issue ID, and Article ID.

IScript_GetArticleTitleImage first retrieves the Article Title Image ID. Using this ID, it calls the **IScript_GetImage** function to retrieve the image information.

Parameters (from Function Call)

None

Parameters (from query string)

Parameters	Description
PUB	The publication ID. It is set in the query string by PUB=<Publication ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Publication.
ISSUE	The Issue ID. It is set in the query string by ISSUE=<Issue ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Issue.
ARTICLE	The Article ID. It is set in the query string by ARTICLE=<Article ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Article.

Return Value

Return	Description
String	Returns the HTML Image tag for the Article Title Image.

IScript_GetArticleSubTitle

Syntax

```
IScript_GetArticleSubTitle( )
```

Declaration

```
Declare Function IScript_GetArticleSubTitle PeopleCode EO_PE_ARTICLE
FieldFormula;
```

Description

IScript_GetArticleSubTitle retrieves the Article Sub-Title for a particular Article in a particular issue of a Publication. **IScript_GetArticleSubTitle** takes inputs from the Query String for the Publication ID, Issue ID and Article ID.

Parameters (from Function Call)

None

Parameters (from Query String)

Parameters	Description
PUB	The publication ID. It is set in the query string by PUB=<Publication ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Publication.
ISSUE	The Issue ID. It is set in the query string by ISSUE=<Issue ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Issue.
ARTICLE	The Article ID. It is set in the query string by ARTICLE=<Article ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Article.

Return Value

Return	Description
String	Returns Article Sub-title

IScript_GetArticleBody

Syntax

```
IScript_GetArticleBody( )
```

Declaration

```
Declare Function IScript_GetArticleBody PeopleCode EO_PE_ARTICLE FieldFormula;
```

Description

IScript_GetArticleBody retrieves the Article Body Text for a particular article in an issue of a publication. **IScript_GetArticleBody** accepts inputs from the query string for the Publication ID, Issue ID, and Article ID.

Parameters (from Function Call)

None

Parameters (from Query String)

Parameters	Description
PUB	The publication ID. It is set in the query string by PUB=<Publication ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Publication.
ISSUE	The Issue ID. It is set in the query string by ISSUE=<Issue ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Issue.
ARTICLE	The Article ID. It is set in the query string by ARTICLE=<Article ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Article.

Return Value

Return	Description
String	Returns the Article Body Text.

IScript_GetArticleImage

Syntax

```
IScript_GetArticleImage( )
```

Declaration

```
Declare Function IScript_GetArticleImage PeopleCode EO_PE_ARTICLE FieldFormula;
```

Description

IScript_GetArticleImage retrieves the Article Image for a particular article in an issue of a publication. **IScript_ GetArticleImage** takes inputs from the query string for the Publication ID, Issue ID and Article ID.

IScript_ GetArticleImage retrieves the Article Image ID. Using this ID, it calls the **IScript_GetImage** function to retrieve the image information.

Parameters (from Function Call)

None

Parameters (from Query String)

Parameters	Description
PUB	The publication ID. It is set in the query string by PUB=<Publication ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Publication.
ISSUE	The Issue ID. It is set in the query string by ISSUE=<Issue ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Issue.
ARTICLE	The Article ID. It is set in the query string by ARTICLE=<Article ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Article.

Return Value

Return	Description
String	Returns the HTML Image tag for the Article Image.

IScript_GetArticleAuthor

Syntax

```
IScript_GetArticleAuthor( )
```

Declaration

```
Declare Function IScript_GetArticleAuthor PeopleCode EO_PE_ARTICLE FieldFormula;
```

Description

IScript_GetArticleAuthor retrieves the Article Author for a particular article in an issue of a publication. **IScript_GetArticleAuthor** accepts inputs from the Query String for the Publication ID, Issue ID, and Article ID.

Parameters (from Function Call)

None

Parameters (from Query String)

Parameters	Description
PUB	The publication ID. It is set in the query string by PUB=<Publication ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Publication.
ISSUE	The Issue ID. It is set in the query string by ISSUE=<Issue ID>. The function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Issue.
ARTICLE	The Article ID. It is set in the query string by ARTICLE=<Article ID>. This function must have this query string parameter to retrieve the correct values from the database. This value is retrieved in the function and set to the variable &Article.

Returns

Return	Description
String	Returns the Article Author.

IScript_ArticleTemplate

Syntax

```
"?ICTYPE=Script&ICScriptProgramName=WEBLIB_WEBPUB.EO_PE_TEMPLATES.FieldFormula.I
Script_ArticleTemplate"
```

Description

IScript_ArticleTemplate assembles the article page for a particular publication issue section. It uses the article built-in functions described previously to produce each value required by the article page template. It is assembled by passing all required parameters as bind variables to the HTML Article Page Template.

Customized article page layouts require changes to the code. For example, if the HTML template has eight bind variables, IScript_ArticleTemplate must pass eight values (including HTML markup returned by other page built in functions) to match. Using some of the examples from the previous sections, we have:

&HTMLText = GetHTMLText(HTML.EO_PE_ARTICLETEMPLATE, &HTMLHeader, &HTMLNav1, &HTMLNav2, &HTMLCategoryImage, &HTMLTitle, &HTMLNav3, &HTMLBody, &HTMLFooter)

- EO_PE_ARTICLETEMPLATE is the article page layout.
- &HTMLHeader, &HTMLNav1, &HTMLNav2, and &HTMLFooter contain the HTML markup for the header, publication navigation, section navigation, and footer portion of the layout.
- &HTMLNav3 is the side navigation bar that lists articles for the current section.
- &HTMLCategoryImage contains the HTML markup for the category image.
- &HTMLTitle is the article's title image.
- &HTMLBody contains the HTML markup of the article image, text, and author.

Example Call

```
<A
HREF=http://host:port/path?ICType=Script&ICScriptProgramName=WEBLIB.WEBPUB.EO_PE
_TEMPLATES.FieldFormula.Iscript_SectionArticleTemplate&PUB=PEOPLETALK&ISSUE=JUNG
AUG2000&Section=News&Category=Category1&Article=ArticleID1> Article Title </A>
```

Return Value

Return	**Description**
String	Returns the HTML markup for an article in a publication issue section.

Image

IScript_GetImage

Syntax

```
IScript_GetImage(&ImageID)
```

Declaration

```
Declare Function IScript_GetImage PeopleCode EO_PE_IMAGE FieldFormula;
```

Description

IScript_GetImage retrieves the image tag for a particular image ID. The image ID is retrieved, and all the parameters surrounding the image are placed within the image tag.

Parameters (from Function Call)

Parameters	Description
&ImageID	This is the Image ID for the image that is to be retrieved.

Parameters (from Query String)

None

Returns

Return	Description
String	Returns the HTML Image Tag.

CHAPTER 15

Managing the Guest User Account

The guest user account is an optional configuration that enables anyone to access the portal as a guest. In addition, the associated homepage for the guest user account can be configured with pagelets and transactions suitable for the guest user.

This chapter is intended for the portal's system administrator. It describes these actions:

- How to set up the guest user account.
- How to customize the Guest homepage.

Guest User Account: Setup

To set up auto-sign in with the guest account:

1. Access the portal database web server's configuration.properties file.

   This file is located in the directory specified when you run the PeopleSoft Internet setup. The relative path is \psftdocs\peoplesoft8\configuration.properties. (The peoplesoft8 portion of this relative path is the actual folder name specified when you run the PeopleSoft Internet setup.)

2. Ensure that byPassSignOn = true.

3. Ensure that default OPERID = GUEST.

4. Ensure that defaultPWD = GUEST.

These settings apply to any portal database that allows guests to log on to the system.

Users access the guest account with a Uniform Resource Locator (URL) that is based on the following format:

http://localhost/servlets/psportal/peoplesoft8/?cmd=start, where localhost matches the PortalServlet web server host name.

This URL bypasses the initial login and uses the default login, which you set to GUEST in the configuration.properties file.

This URL can be set up with an alias in the web server. For more information about this, refer to your web server documentation.

Guest User Account: Security

The database has guest security that takes into account the following:

- Guest users.
- Guest permission lists.
- Guest roles.

The database is delivered with a sample Guest homepage. This Guest homepage displays database pagelets based upon iPages and WEBLIBs that have been attached to the guest permission list. This permission list is then attached to the guest role.

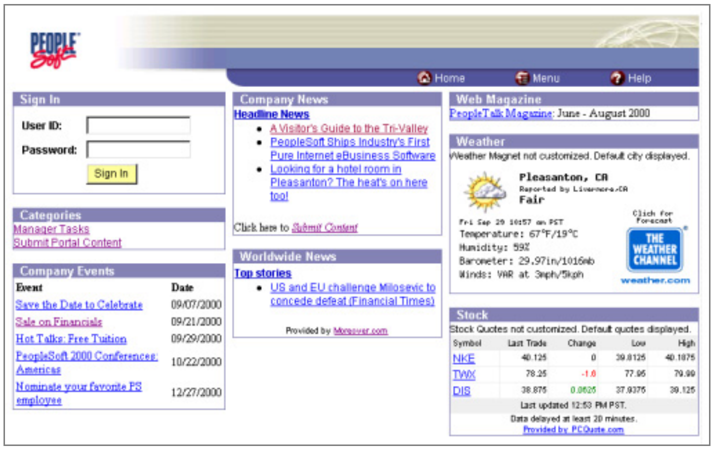
You should do the following tasks on the Permission List page:

- Ensure that additional pagelets that appear on the Guest homepage are attached to the guest permission list.
- Ensure that any transaction accessible by a guest user is attached to the guest permission list.

The sign in pagelet is displayed by the Guest homepage only and should not be registered in the portal. This prevents the pagelet from appearing on a non-guest user's personalized homepage.

Guest Homepage

The Guest homepage is preconfigured with pagelets that are suitable for all users. As shown in the following screen illustration, the pagelets appear in their familiar box-like structures.



Guest homepage

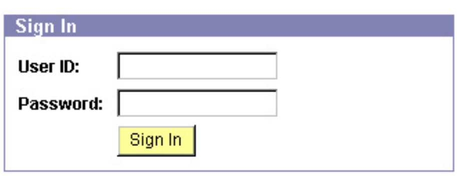
Because it's designed to be shared by guest users, the Guest homepage cannot be personalized. As a result:

- The navigation header of the Guest homepage does not include the Sign Out, Favorites, and Add to Favorites buttons. Guest users cannot sign out of the portal because the Guest homepage is the default homepage. Moreover, without the Favorites and Add to Favorites features, guest users cannot build a collection of their favorite links.

- The Personalize Layout and Personalize Content links do not appear on the Guest homepage. Without the Personalize Layout link, guest users cannot access the page where they can arrange the layout of pagelets. Likewise, without the Personalize Content link, guest users cannot access the page where they can specify which pagelets should appear on the Guest homepage.

Sign In Pagelet

The Sign In pagelet, as shown in the following screen illustration, appears only on the Guest homepage. Using the Sign In pagelet, the guest user can access the secured account to access additional pagelets and transactions.



Sign In pagelet

User ID	If the user ID ***Guest*** does not exist, you must create it in the portal database.

Creating a User ID for Guests

To create a user ID for guest users:

1. Log on to the portal database through the PeopleSoft Internet Architecture.
2. Select PeopleTools, Maintain Security, Use, User Profiles.
3. Enter the user ID *Guest.*
4. Select Add a New Value.
5. Under the General tab:
    a. Select symbolic id *sa1*.
    b. Enter the password *Guest.*
    c. Confirm the password *Guest.*
    d. Select User Type *None.*
6. Under the Roles tab, insert the Role Name Guest.
7. Click the Save button.

Customizing the Guest Homepage

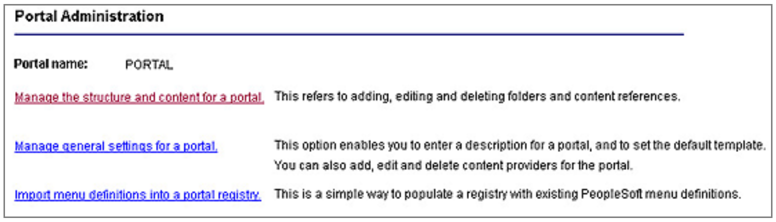
To customize the Guest homepage, you have to modify the guest user template. This involves accessing and editing the HTML code for the guest user template.

Accessing the HTML Code

To access the HTML code:

1. Click the Menu button on the portal homepage.
2. Access the Portal Administration page using the following navigation: Portal Administration, Registry Administration, Manage Portal Registry.

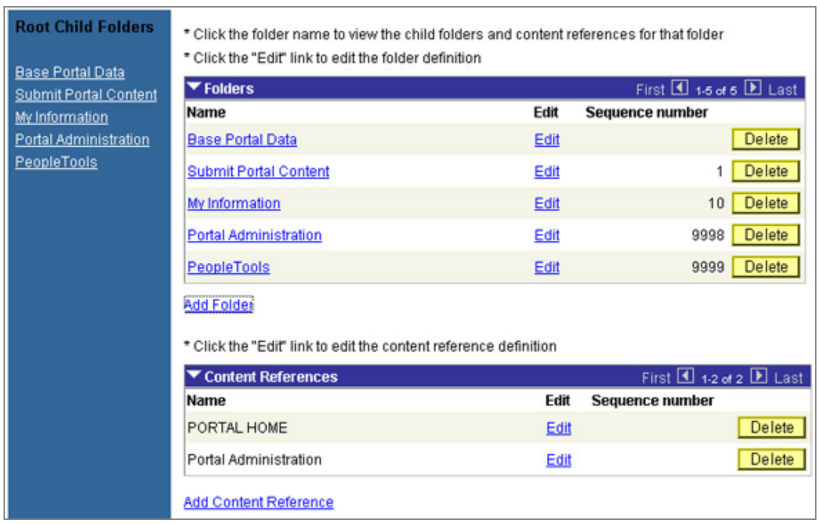
    The system displays the Portal Administration page.



Portal Administration page

3. Click the Manage the structure and content for a portal link.

   The Folders page then appears.



Folders page

4. Click the **Base Portal Data** link on the Folders page.

5. Click the **Users** link.

6. Click the **Guest** link.

7. Click the **Edit** link in the Content References region.

   The Content Reference page then appears.

Content Reference Page

The **HTML Area** text box contains the HTML code for the guest user's homepage. You can edit the HTML code to change the appearance of the homepage.

The following is the basic structure of the default HTML code:

```
<html>

<head>

<TITLE>People Power the Internet</TITLE>

</head>

<body>



<table width="100%">

   <tr>

      <td>



<Header HTML>



      </td>

   </tr>

</table>
```

```
 <table width="100%">

   <tr>

      <td width="33%" valign="top">


<Pagelet HTML>

      </td>


      <td width="6">

      </td>


      <td width="33%" valign="top">

    <Pagelet HTML>


      </td>


      <td width="6">

       </td>


      <td width="33%" valign="top">

<Pagelet HTML>


      </td>


   </tr>


</table>


</body>

</html>
```

Header HTML

The default HTML code calls the iScript Header HTML. This iScript builds the PeopleSoft header that you see in the portal. Header HTML consists of the following code:

```
<IClientComponent Name="UniversalNavigation">

   <SOURCE Product="Portal">

ICType=Script&amp;ICScriptProgramName=WEBLIB_SIGNIN.ISCRIPT1.FieldFormula.IScrip
t_HPDefaultHdr

   </SOURCE>

</IClientComponent>
```

You can specify a different iScript for the header. To do this, change the value of ICScriptProgramName. The syntax is:

```
ICScriptProgramName=<RecordName.<FieldName>.EventName>.<FunctionName>
```

Changing Pagelets in the Homepage

The following is an example of HTML code for a homepage pagelet.

```
<!-- Begin
Pagelet=ICType=Script&ICScriptProgramName=WEBLIB_SIGNIN.ISCRIPT1.FieldFormula.IS
cript_Signin -->

<TABLE WIDTH="100%" CELLPADDING="0" CELLSPACING="0" BORDER="0" HSPACE="0"
VSPACE="0">

   <TR HEIGHT="16">

      <TD CLASS="PTCOMPONENTHEADER" HEIGHT="16"  valign="middle" WIDTH="100%"
COLSPAN="4">  Sign In</TD>

   </TR>

   <TR>

      <TD CLASS="PTCOMPONENTHEADER" WIDTH="1"><TABLE WIDTH=1 CELLSPACING=0
CELLPADDING=0><TR><TD></TD></TR></TABLE></TD>

      <td width="100%">

        <IClientComponent Name="Sign In">

            <Source
Product="Portal">ICType=Script&ICScriptProgramName=WEBLIB_SIGNIN.ISCRIPT1.FieldF
ormula.IScript_Signin&PORTALPARAM_COMPWIDTH=Narrow</Source>

         </IClientComponent>
```

```
      </td>

      <TD CLASS="PTCOMPONENTHEADER" WIDTH="1"><TABLE WIDTH=1 CELLSPACING=0
CELLPADDING=0><TR><TD></TD></TR></TABLE></TD>

   </TR>

   <TR>

      <TD COLSPAN="4" CLASS="PTCOMPONENTHEADER" WIDTH="100%"></TD>

   </TR>

</TABLE>

<BR>

<!-- End
Pagelet=ICType=Script&ICScriptProgramName=WEBLIB_SIGNIN.ISCRIPT1.FieldFormula.IS
cript_Signin -->
```

To specify which pagelets appear on the guest homepage, you have to change the following sections of the code to call the iScript functions or iPages that correspond with the pagelets that you want to appear. For additional pagelets, you can duplicate the sections and then modify them as necessary. Use standard HTML constructs in order to arrange the pagelets as desired.

Section:

```
<!-- Begin
Pagelet=ICType=Script&ICScriptProgramName=WEBLIB_SIGNIN.ISCRIPT1.FieldFormula.IS
cript_Signin -->
```

Section:

```
<IClientComponent Name="Sign In">

            <Source
Product="Portal">ICType=Script&ICScriptProgramName=WEBLIB_SIGNIN.ISCRIPT1.FieldF
ormula.IScript_Signin&PORTALPARAM_COMPWIDTH=Narrow</Source>

         </IClientComponent>
```

Section:

```
<!-- End
Pagelet=ICType=Script&ICScriptProgramName=WEBLIB_SIGNIN.ISCRIPT1.FieldFormula.IS
cript_Signin -->
```

Our sample code calls the iScript function for the Sign In pagelet. Specifically, this pagelet is defined by the function IScript_Signin, located on the IScript1 field of the record WEBLIB_SIGNIN.

CHAPTER 16

Understanding the Portal Registry Load Process

In this chapter, we describe how to use the portal registry load process. Specifically, you will learn how to perform the following tasks:

- Create a flat file for use in the registry load process.
- Launch the portal registry load message.
- Run the Application Engine (AE) registry load process, which must be executed in order to load content references and folders.

This chapter is intended for system administrators who will implement and maintain the portal.

Overview

Loading data into the portal registry involves two staging tables: EO_PE_LOAD_DTL and EO_PE_LOAD_FLDR.

The Enterprise Integration Point (EIP) delivers both an application message and a file layout in the form of a comma separated file. You can use your own Application Program Interfaces (APIs) to match the PORTAL_REG_LOAD message format. You can also export the data into a spreadsheet, save it as a Comma Separated Value (CSV) file, and follow the steps for the inbound flat file utility.

For more information about the inbound flat file utility, refer to the chapter Introducing the Flat File Utility in the *PeopleSoft Enterprise Integration PeopleBook*.

For the inbound flat file definition, use the layout and message combination PORTAL_REG_LOAD.

The end result of the flat file utility should be a published PORTAL_REG_LOAD message. When the message is subscribed by the portal, you'll see the data in the tables EO_PE_LOAD_DTL and EO_PE_LOAD_FLDR.

The message subscription was set to generate a subscription ID. This subscription ID was used to fill the process instance field in EO_PE_LOAD_DTL and EO_PE_LOAD_FLDR records.

After the file data is in the staging tables, you can run the AE registry load process to load the data into the portal registry.

Using the Inbound File Utility

Should you choose to use the inbound file utility, you'll need to create a comma-delimited file and you will need to launch the portal registry load message. This section discusses the following tasks:

- How to create a flat file containing data to be loaded into the portal registry.
- How to launch the portal registry load message.

Creating a Portal Registry Load File

The File Inbound Utility requires a comma-delimited format (*.CSV). For this file to work with the registry load process, the data in the file must be in a very specific order. Therefore, two sample files are provided for you. These sample files will give you a basis for creating your own inbound files for the portal registry load process.

Delivered Sample File Name	***Usage***
PORTAL_REG_LOAD_SAMPLE.xls	Excel spreadsheet file with column headings. This file contains registry data for sample folders, sample pagelets, and sample target pages.
PORTAL_REG_LOAD_SAMPLE.csv	Comma-delimited file without column headings. The file is created by deleting the column heading row from PORTAL_REG_LOAD_SAMPLE.xls and then saving the file as type CSV, comma delimited (*.csv). This results in data that is in the precise format required by the registry load process.

The files delivered are meant as examples. PORTAL_REG_LOAD_SAMPLE.csv can be loaded into a testing demo portal database. The registry load process will not overwrite existing registry content references. Consequently, once the file data is loaded, it must be manually deleted from the portal registry if you want to re-load the same data.

Portal Registry Load File columns

The file PORTAL_REG_LOAD_SAMPLE.xls is an Excel spreadsheet file that contains a row of column headings. These column headings describe the data required for that column. The column data reflects the data that is entered when you register a content reference in the portal.

External URLs, PeopleSoft Components, and PeopleSoft iScripts are the only types of content that can be registered as content references using the registry load file. Only homepage pagelets and target pages can be registered using the registry load file. Each row in the file represents a different content reference.

Templates and template components cannot be registered using the portal registry load file. These types of content references must be registered online.

With the registry load process, content is registered down to six folder levels. The process starts at the first level and works its way through the folders listed for the content reference. The content reference is registered under the lowest level non-blank folder. If a specified folder label is not found in the registry, the registry load process will create this folder. The object name for created folders is formatted to match the uppercased value of the label. If this object name already exists, a numeric value is appended to make the object name unique in the portal registry. If no folder is specified for a given content reference row, the content reference is registered at the root level.

The columns in the file must be in the exact order and format as delivered in the sample files for use by the registry load process. The following explains the format and use of each column. Failure to provide a value for the required columns will result in an error status for that content reference row during the registry load process. Content reference rows whose status is ‘E’ in the staging table are not registered. You can view the errors for your data and correct errors in the staging tables. Refer to "Viewing Portal Registry Load File Errors."

Only rows in error are available in the View Load Errors page.

Column Heading	***Format***	***Use***	***Required***
Portal Name	30-character uppercase, no spaces.	This value must match the Portal Definition object name. Delivered as PORTAL.	Required

Column Heading	Format	Use	Required
Content Provider	30-charactermixed case, no spaces.	This value must match the exact spelling and case of an existing Content Provider object name. This is the content provider for the content reference. Delivered selections include BP, EPM, ERP, GFHA, HRMS, Portal, SAHA.	Required for components and iScripts.
Portal Template	30-character uppercase, no spaces.	This value must match a registered template object name. This is the template to be used by the content reference. Do not specify the template label.	Optional
Product	4-character mixed case. Truncated after 4 characters.	Optional value stored with the content reference registry entry. This is a selectable value in the registry load process to limit which rows in this file are to be registered as content references.	Optional
Category	30-character uppercase, no spaces.	Used for user organization of the load file. This is a selectable value in the registry load process that limits which rows in this file are to be registered as content references.	Optional
URL Type	1-character uppercase.	Used to define the type of the content reference target page. Acceptable values include S, C, or X. S – iScript C – Component X – External	Required
Usage Type	1-character uppercase	Used to define the use of the content reference target age. Acceptable values include P or T. P – Pagelet T –Target	Required
Hidden	1-character uppercase	Specifies whether the content reference will be hidden in the Menu navigation. N – Not hidden Y – Hidden	Required
Fldr 1 Seq	4-Numeric	Specifies the display order of the level 1 folder.	Optional

Column Heading	***Format***	***Use***	***Required***
Fldr 1 Name	30-character free-form	Level 1 folder label.	
Fldr 1 Desr	254-character free-form	Level 1 folder description.	Optional
Fldr 2 Seq	4-Numeric	Specifies the display order of the level 2 folder.	Optional
Fldr 2 Name	30-character free-form	Level 2 folder label.	
Fldr 2 Desr	254-character free-form	Level 2 folder description.	Optional
Fldr 3 Seq	4-Numeric	Specifies the display order of the level 3 folder.	Optional
Fldr 3 Name	30-character free-form	Level 3 folder label.	
Fldr 3 Desr	254-character free-form	Level 3 folder description.	Optional
Fldr 4 Seq	4-Numeric	Specifies the display order of the level 4 folder.	Optional
Fldr 4 Name	30-character free-form	Level 4 folder label.	
Fldr 4 Desr	254-character free-form	Level 4 folder description.	Optional
Fldr 5 Seq	4-Numeric	Specifies the display order of the level 5 folder.	Optional
Fldr 5 Name	30-character free-form	Level 5 folder label.	
Fldr 5 Desr	254-character free-form	Level 5 folder description.	Optional
Fldr 6 Seq	4-Numeric	Specifies the display order of the level 6 folder.	Optional
Fldr 6 Name	30-character free-form	Level 6 folder label.	

Column Heading	Format	Use	Required
Fldr 6 Desr	254-character free-form	Level 6 folder description.	Optional
Cref Seq	4-Numeric	Specifies the display order of the content reference within the lowest level folder.	Optional
Cref Name	30-character free-form	The content reference label.	Required
Cref Descr	254-character free-form	The content reference description.	Optional
Menu Name	30-character uppercase, no spaces.	Only used by components. The menu name that stores the component.	Required for Components
Market	3-character uppercase, no spaces.	Only used by components. The Market associated with the component (usually GBL).	Required for Components
Panel Group	18-character uppercase, no spaces.	Only used by components. The component name that stores the page(s).	Required for Components
Record Name	15-character uppercase, no spaces.	Only used by iScripts. The record name that stores the iScript. The record must begin with WEBLIB_.	Required for IScripts.
Field Name	18-character uppercase, no spaces	Only used by iScripts. The field name that stores the iScript.	Required for IScripts.
Pcode Event Type	14-character mixed case, no spaces.	Only used by iScripts. The PeopleCode function event that stores the iScript (usually FieldFormula)	Required for IScripts.
Pcode Function Name	30-character mixed case, no spaces.	Only used by iScripts. The PeopleCode function name used to invoke the iScript. This value may contain appended query string parameters if length permits. The function must begin with iScript_.	Required for IScripts.
Portal Object Name	30-character uppercase, no spaces.	The object name given to the content reference. If this value is blank, the value in the content reference label column (Cref Name) is used.	Optional
Default Column	1-numeric	Only used by pagelets. If blank, the default value is 1. Defines which column the pagelet will default to on the homepage layout.	Optional

Column Heading	***Format***	***Use***	***Required***
		1 – first column 2 – second column	
Edit URL Content Provider	30-character mixed case, no spaces.	Only used by pagelets. The content provider for the pagelet's edit URL used to access the pagelet's personalization page. The edit URL is listed in the ExternalURL /Edit URL/Related Link column. If no edit URL is specified, leave this column blank.	
External URL/Edit URL /Related Link	Unlimited long character. Free form.	Use of this column depends upon the URL type and the usage type of the content reference. Component or iScript Pagelets: Optional. The URL used to access the pagelet's personalization page. The Edit URL value for a PeopleSoft personalization page must be of the following form, replacing MENU_NAME, MKT_NAME, and COMPONENT_NAME with the PeopleSoft values. ICType=Panel&Menu=MENU_NAME&Market=MKT_NAME&PanelGroupName=COMPONENT_NAME Component or iScript Targets: Optional. The concatenated string used to specify all the related links and related link groups for the content reference. Create the string online on the related link edit- page and copy the result into your file. For more information, refer to "Understanding Related Links". External Targets: Required. The URL used to access the external content reference. If no content provider is listed for this content reference, state the complete URL (i.e.that is: http:// etc.and so on). If a content provider is used, then only state the remaining portion of the URL.	Required for External URL's

Column Heading	Format	Use	Required
Keyword List	254-character free form.	The list of key word(s), delimited by spaces, used by the search engine index to return this content reference when a user invokes the portal search.	Optional
Permission Lists	254-character uppercase, spaces allowed.	List of 8-character permission list(s), delimited by semicolons. These are the permission lists used to secure access to this content reference. Do not leave this blank. Make sure that the first listed permission list is one that the administrator who will load the registry file has access to. Otherwise, the registry API will not allow the administrator to register the content reference.	

Creating a Portal Registry Load File

In order for the file to be usable by the registry load process, the number of columns and format in your file must exactly match that of the delivered PORTAL_REG_LOAD_SAMPLE.xls file.

To create a new portal registry load file:

1. Save PORTAL_REG_LOAD_SAMPLE.xls with a different name.
2. Replace the existing rows with your data. The number of rows of data is not limited.

Do not put any commas or tabs in any of the Excel file cells, including the description fields. If you use commas or tabs, they will throw off the data stored as a comma delimited file.

---

3. Save the file with your data.
4. Delete the row that contains the column headings.
5. Save the file again, with a file type CSV (*.csv).
6. Place the file in a directory accessible to the application server for the portal database.

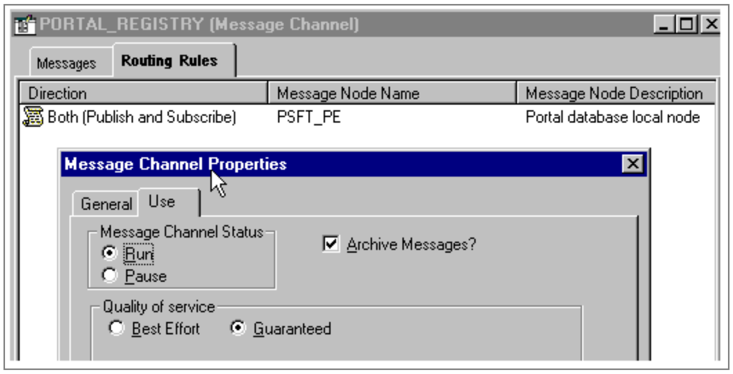
Launching the Portal Registry Load Message

To launch the portal registry load message:

1. Create the local portal message node and specify the location.
2. Open the PORTAL_REGISTRY (Message Channel) panel.

3. Select the Routing Rules tab.

   The Message Channel Properties panel appears, as shown in the following screen illustration.



Message Channel Properties panel

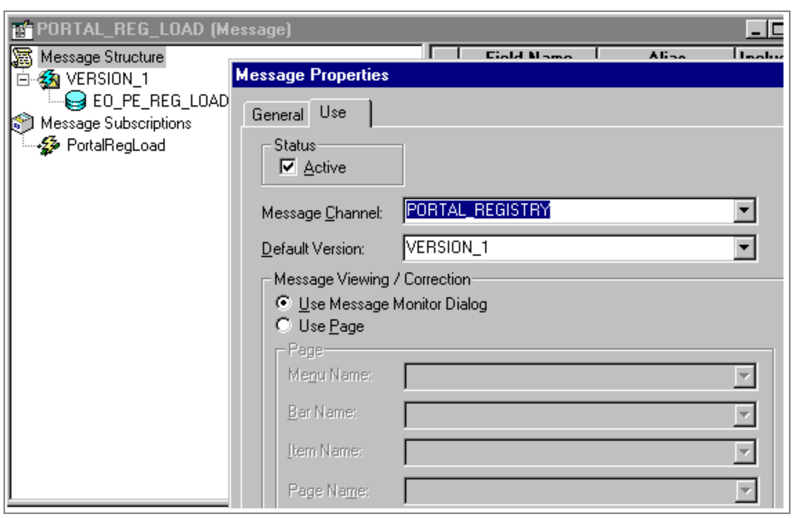
4. Specify the portal message node that you created using both publish and subscribe as routing directions.

5. Select **Run** in the **Message Channel Status** group box.

6. Click the Save button to save the channel.

7. Open the message PORTAL_REG_LOAD.

8. As shown in the following screen illustration, activate the message PORTAL_REG_LOAD by selecting the **Active** check box in the Message Properties panel.



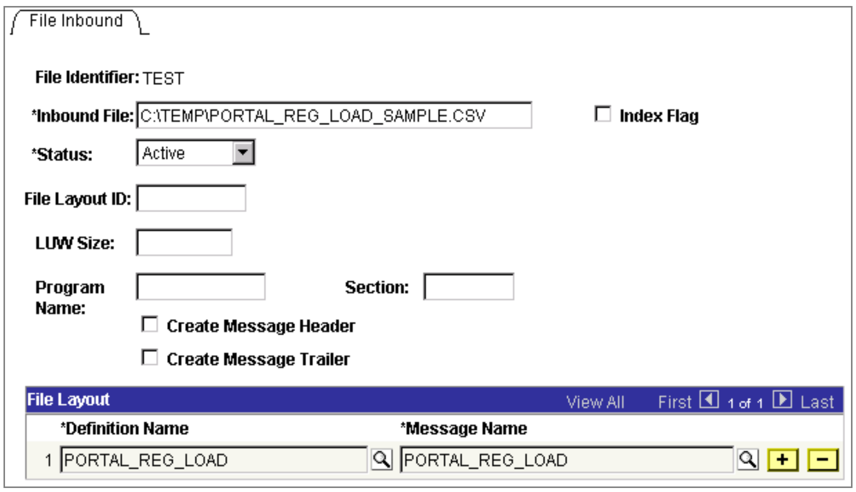
Message Properties panel

9. Click the Save button to save the message.

   In what follows, you use the File Inbound page to continue the process.

Using the File Inbound Page

Usage	Use the File Inbound page to define inbound file processing.
Object Name	EO_FILE_INBOUND
Navigation	Click the Menu link in the portal header. Select **Portal Administration, File Import, Inbound File Rule.**
Access Requirements	Click the Add A New Value link on the Find an Existing Value dialog box. Enter a file ID in the File Identifier field of the Add a New Value dialog box. Then click the Add button.



File Inbound page

The File Inbound page is discussed extensively in the *PeopleSoft Enterprise Integration PeopleBook:* For more information, refer to the chapter Introducing the Flat File Utility.

To continue launching the portal registry load message with the File Inbound page:

1. In the **Inbound File** field, enter the directory information where the file resides.

   If you're running the process in 3-tier, the inbound file portal_reg_load_sample.csv must reside in a directory that is accessible by the application server. In 3-tier mode, the process runs at the server side and not the client.

2. Select ***Active*** from the **Status** drop-down list box.

3. Clear the Create Message Header and Create Message Trailer check boxes.

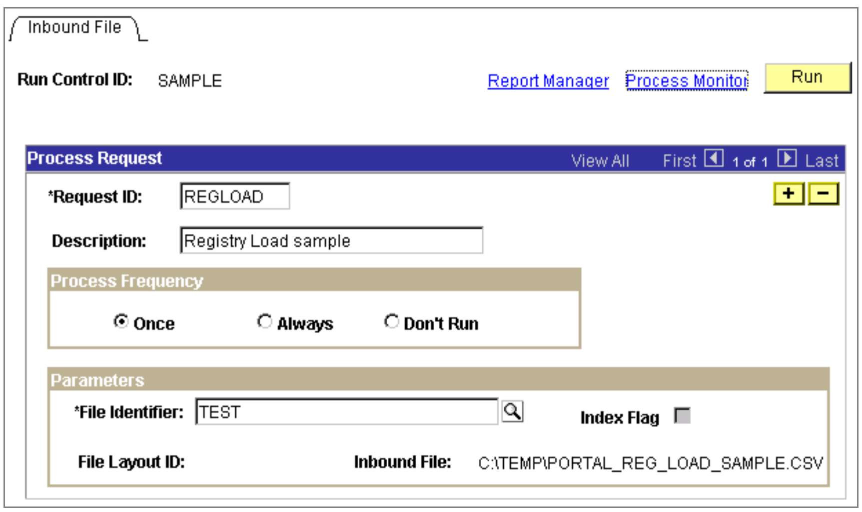
4. In the File Layout group box, choose ***PORTAL_REG_LOAD*** for the **Definition Name** and **Message Name** fields.

5. Do not fill in the other fields.

You're now ready to run a process request with the Inbound File Publish page.

Running A Process Request with the Inbound File Publish Page

Usage	Use the Inbound File Publish page to initiate the file to message processing. The file to message processing function reads the file rowset and publishes it as a message.
Object Name	EO_FILETOMSG
Navigation	Click the Menu link in the portal header. Select **Portal Administration, File Import, Inbound File Publish.**
Access Requirements	Click the Add a New Value link on the Find an Existing Value dialog box. Enter a run control ID in the Run Control ID field of the Add a New Value dialog box. Then click the Add button.



Inbound File Publish page

The Inbound File Publish page is discussed extensively in the *PeopleSoft Enterprise Integration PeopleBook:* For more information, refer to the chapter Introducing the Flat File Utility.

To run a process request with the Inbound File Publish page:

1. Enter a request ID in the **Request ID** field.
2. Enter a description in the **Description** field.
3. In the **Process Frequency** group box, select one of the following process frequencies: ***Once, Always, Don't Run.***
4. In the **File Identifier** field, enter the File ID that you created when accessing the File Inbound page. Refer to the access requirements described in Using the File Inbound Page. You can also click to find the File ID.
5. Click the **Save** button.

6. Click the **Run** button and note the process instance number.

7. Click the **Process Monitor** link and note whether the process has completed.

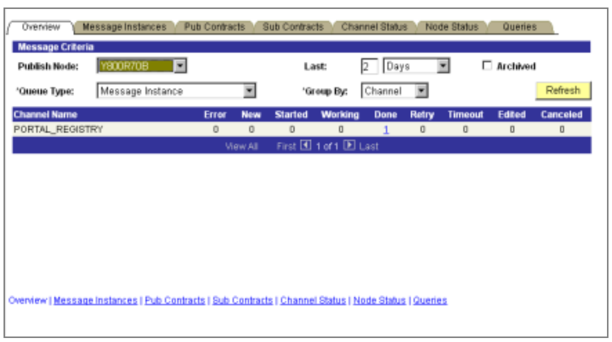
When the process has completed, you use the Application Message Monitor page for the next series of steps.

Using the Application Message Monitor Page

To use the Application Message Monitor page:

1. From the portal homepage, select Menu, PeopleTools, Application Message Monitor, Use, Application Message Monitor.

   The Application Message Monitor page appears, as shown in the following screen illustration.



Application Message Monitor page

For more information about the Application Message Monitor page, refer to PeopleSoft Application Messaging in the *PeopleTools PeopleBook.*

---

2. Click the **Pub Contracts** tab.

   The Pub Contracts page appears, as shown in the following screen illustration.

Pub Contracts page

3. Select the publish node from the **Publish Node** drop-down list box.

4. Select the channel name from the **Channel Name** drop-down list box.

5. Select the message name from the **Message Name** drop-down list box.

6. Click the **Refresh** button.

7. Check the **Status** field to see if ***Done*** is displayed for the published message.

8. Click the **Sub Contracts** tab.

   The Sub Contracts page appears, as shown in the following screen illustration.

The Sub Contracts page

9. Click the Refresh button.

10. Check the Status field to see if ***Done*** is displayed for the message's subscription contract.

11. Using your SQL query tool of choice, query the staging tables PS_EO_PE_LOAD_DTL and PS_EO_PE_LOAD_FLDR.

    To check if the data in the original spreadsheet has been loaded into the tables, look for the process instance number that was given for the message PORTAL_REG_LOAD under the PSCAMA record.

12. Run the AE process, which is discussed in the next section.

Running the AE Registry Load Process

Before you can run the AE Registry Load process, you must perform these tasks:

- Delete the application server cache files and two-tier cache files.
- Configure and start the Process Scheduler for the application server.

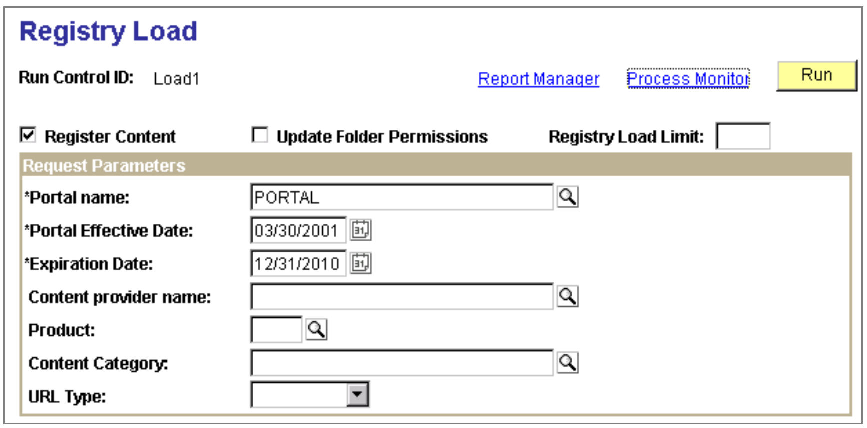
  This is an AE process. Run it on the client in two-tier or on the application server in three-tier. For three-tier, you must start the application server and the Process Scheduler.

- Set up a control ID and run the AE process.

  You use the Registry Load page to run the AE process.

Using the Registry Load Page

Usage	Use the Registry Load page to run the AE (Application Engine) process.
Object Name	EO_PE_RUN_LOAD
Navigation	In two- or three-tier or PIA, select **Portal Content, Administer Registry Content, Process, Registry Load.** Click the Menu link in the portal header and select Portal Administration, Registry Load Import, Run Registry Load.
Access Requirements	Click the Add a New Value link in the Find an Existing Value dialog box. Enter a run control ID in the Run Control ID field of the Registry Load: Add a New Value dialog box. Then click the Add button.



Registry Load page

For more information about the portal registry, refer to the chapter Understanding the Portal Registry in the *PeopleTools Portal Technology PeopleBook.*

Running the AE Registry Load Process

To run the AE Registry Load process:

1. Enter ***PORTAL*** in the **Portal name** field. Click to look up the exact value.
2. Enter an effective date in the **Portal Effective Date** field.
3. Enter an expiration date in the **Expiration Date** field.
4. Ensure that the **Register Content** check box is selected.
5. Leave the **Registry Load Limit** field blank (or enter ***1000*** to limit the number of rows loaded).

6. Select the **Update Folder Permissions** check box if you want all the parent folders to be updated with their children's content reference permission lists.

   Updating the folder permissions can be done at any time. The AE Registry Load program uses the portal registry data to update the folder permissions for the entire portal registry. It does not use the data in the staging tables.

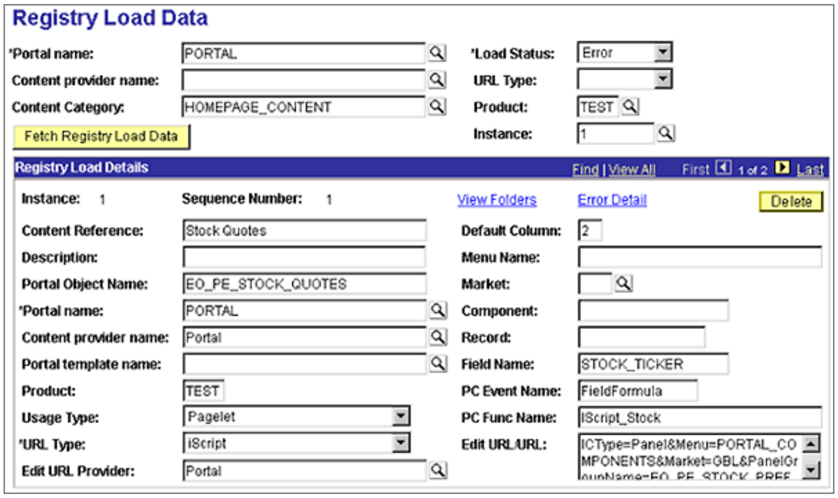
7. Click the **Run** button.

After the load process has run, you can view and correct errors to the data in the staging tables. (You will want to update your flat file to reflect your changes for safekeeping.) Then re-run the load process.

For more information about how to review and correct errors, refer to the section Using the View Registry Load Data Page.

Using the View Registry Load Data Page

Usage	Use the Load Portal Registry page to run the AE (Application Engine) process.
Object Name	EO_PE_REG_LOAD
Navigation	In two- or three-tier or PIA, select **Portal Content, Administer Registry Content, Inquire, Review Registry Load Errors.** Click the Menu link in the portal header and select Portal Administration, Registry Load Import, View Registry Load Data.
Prerequisites	None
Access Requirements	None



Registry Load Data page

The following are the primary fields that you use to review and correct errors.

Portal name Enter PORTAL.

Load Status Select the load status of the rows you wish to view from the Load Status drop-down list. You can select one of the following values:

Error: The content references were marked in error during the load process and were not registered.

Not Loaded: the load process did not pick up the content references. Ensure the following:

- The portal name is PORTAL.
- The portal object name is not already registered.
- The registry load process has completed for this data.

Registered: The load data was successfully entered into the portal registry.

Fetch Registry Load Data Click the Fetch Registry Load Data button.

View Folders Click the View Folders link to access the Registry Load Folders page. From this page, you can view the folder hierarchy. This hierarchy contains the content reference.

Registry Load Details

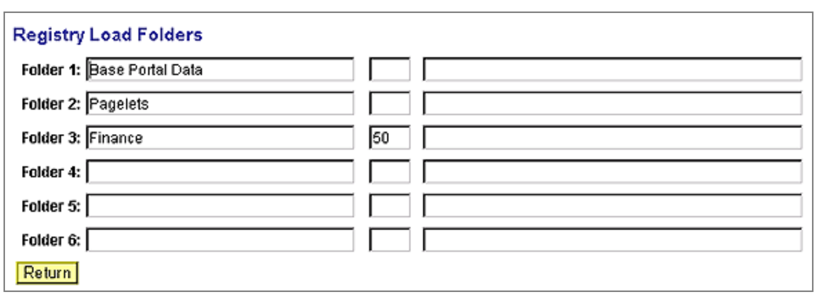
Error Detail

Click the **Error Detail** link for those rows that are returned with the load status criteria set to ***Error.*** This returns a message box with the specific data that caused the data row not to be registered. The types of errors include:

- An invalid portal name (i.e. not PORTAL).
- A blank content reference name (label).
- A blank URL type (Component, iScript, or External).
- Incomplete data required for each URL type (for example, a menu name for a Component URL type).
- An invalid content provider.
- An invalid template name.

The Registry Load Folders page

Usage	Use the Registry Load Folders page to view the folder hierarchy.
Object Name	EO_PE_FLDR_SEC
Navigation	Click the View Folders link on the Registry Load Data page.
Prerequisites	None
Access Requirements	None



Registry Load Folders page

Folder

Displays the name of the folder hierarchy.

Return

Click the Return button to return to the Registry Load Data page.

CHAPTER 17

Building and Using Enterprise Portal Search Indexes

Use this chapter as a supplement to Building and Using Portal Search Indexes, a chapter in the *PeopleTools Portal Technology PeopleBook.*

We recommend that you review that PeopleTools documentation first and refer to this supplement for specific information on defining and creating your enterprise portal search indexes.

This chapter describes:

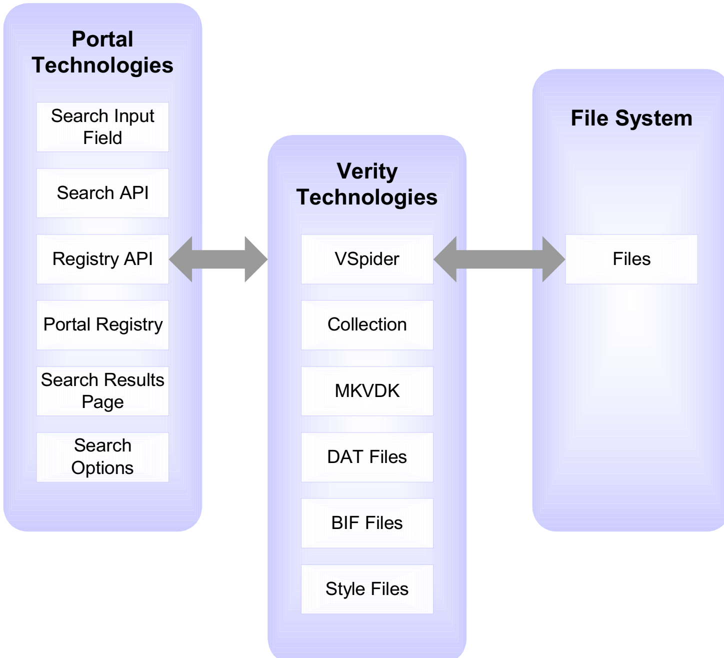
- How to index file system documents using the Portal Search Indexing functionality.
- How the system processes search requests for these documents when users enter a request on the Enterprise Portal Search page.
- How the search results page displays the results.

The Enterprise Portal Search Results page (EO_PE_SRCH_RESULT) is an enhanced version of the standard Search Results page discussed in your PeopleTools documentation.

Search Architecture Overview

In addition to the two main areas of technology provided by the PeopleSoft portal and Verity, you can access File Systems Documents using the Verity Spider command line utility, VSpider. The indexing process uses a combination of Enterprise Portal Search Administration pages, Verity technologies, and Application Engine Program created to launch the Verity Spider command line. This section provides an overview of these components, as well as the name and location of key files used in the indexing process.

The following illustration provides an overview of the main pieces of the Enterprise Portal Search process architecture, including the relationship between PeopleSoft and Verity technologies.



Key Components of the Enterprise Portal search architecture

The Enterprise Portal Search process makes use of all the basic pieces incorporated in the standard PeopleSoft Portal search architecture. The following sections discuss search architecture components that are in addition to or different from the standard search architecture.

For more information about the PeopleSoft portal search architecture, refer to Building and Using Portal Search Indexes in the *PeopleTools Portal Technology PeopleBook.*

Enterprise Portal Search Feature Pages

To take advantage of the Enterprise Portal Search features, you can administer, build, and view your search index results using the following PeopleSoft Portal pages:

- Define Search Collection

  This page captures collection names and related information necessary to spider file system documents.

- Build Directory Search Index

  This page launches an Application Engine process that accepts inputs from the Define Search Collection Page, calls the indexing utility, and builds the search indexes.

- Enterprise Portal Search Results

  This page calculates the top ranked items, formats, and displays search results for the user.

Verity Indexing Technologies

The indexing process makes use of a Verity command line utility and a filtering mechanism that detects most file types. The process also makes use of a file gateway. A gateway defines access to any external data source. The Enterprise Portal Search process uses the default gateway that provides access to documents stored in a file system.

Verity File Locations

We store the Verity schema files on a file server at the following location:

```
$PS_HOME\data\search\PA_EPP_COMMON\style
```

The process stores Verity collection files it generates on a file server at the following location:

```
%ps_home%\data\search\PA_EPP_<index name>\<lang cd>\<subdir>
```

- The <index_name> is the name of the application that the collection is serving.
- The <lang_cd> is the PeopleSoft local language code. These codes include only the following supported PeopleSoft language codes: CFR, DUT, ENG, ESP, FRA, GER, INE, ITA, JPN, and POR. A single portal will have one collection per locale.
- The <subdir> in the following set:
  - Style: Contains the style files that define the collection schema.
  - Parts: Contains the Verity collection index partitions.
  - Topicdx: Contains the topics (precompiled queries for easy synonym processing).
- Other <subdir> directories include assists, morgue, pdd, temp, trans, spider, and work.

Before you attempt to generate your search indexes, make sure that your search collection path specified in the application server configuration file and process scheduler configuration file is PS_HOME\data\search. Should you wish to specify a different search collection path, you must modify the Application Engine program RUN_EO_PE_SIDX to use the different directory path.

The source style files are shipped with the product.

The Application Engine program called by the Build Directory Search Index submits the following command line:

```
%PS_HOME%\bin\server\<environment>\VSPIDER -start <TargetPath> -
collection %ps_home\data\search\PA_EPP_<index name>\<lang cd> -
style %ps_home\data\search\PA_EPP_COMMON\style -locale %locale%
```

The following command line variables are taken from settings made on the Collection Setup page:

- <Target Path> is the file directory you want to spider
- <index name> is the Collection Name
- The <lang_cd> is the PeopleSoft local language code indicated for the collection
- The `-locale` parameter specifies the Locale Code.

For more information about entering these settings for your collections, refer to Defining Enterprise Portal Search Collections.

Enterprise Search Index Process

Follow two main steps to define and build an Enterprise Portal Search Index:

1. Define your search collections. Provide collection name(s), language(s), and source document information.
2. Run the indexing process. Once you've defined one or more collections, you'll launch the spidering process to build out search indexes for your users.

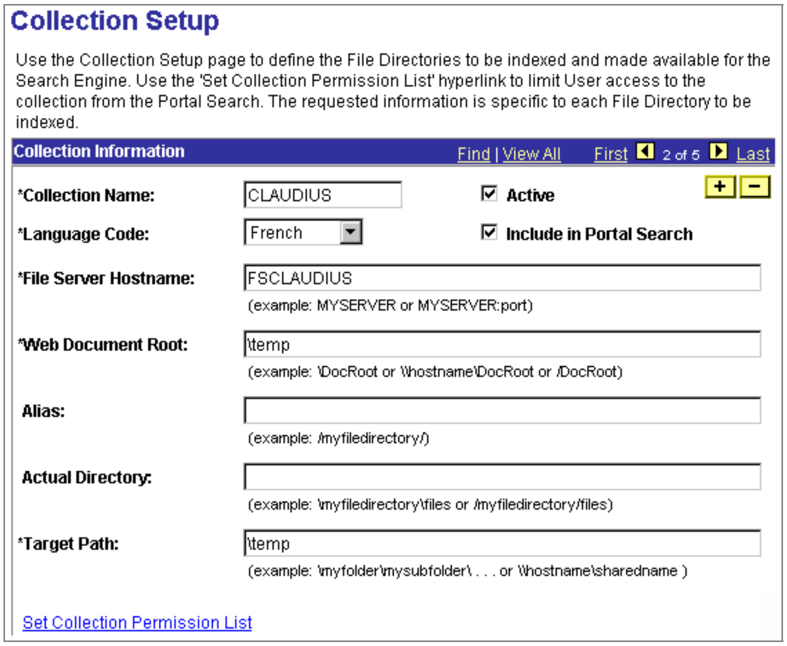
Defining Enterprise Portal Search Collections

The procedure below leads you through the exact steps required to define the enterprise search collections from the Portal Administration pages.

To define an enterprise search collection:

1. Click the Menu button and select Portal Administration, Search Administration, Define Search Collection.

The Collection Setup page appears, as shown in the following screen illustration.



Collection Setup page

2. Specify a Collection Name.

   The Collection Name you enter can be up to 15 characters in length. When you move the cursor out of the field, the system automatically formats your entry to uppercase.

3. Select a **Language Code** for the collection that you specified in step 2.

   This is the PeopleSoft local language code equivalent to Verity's Locale Code. The values that you enter here are translated into the correct Verity Locale Code and used in the –locale parameter for the spidering command.

   You can build multiple language indexes for any collection that you enter here. To do so:

   a. Enter a collection on the Collection Setup page for each language index that you require.

   b. Use the *same* Collection Name for each instance, but specify a *different* Language Code for each occurrence of the Collection Name.

   For example, you can create the following:

Collection Name	***Language Code***
CLAUDIUS	Italian
CLAUDIUS	German
CLAUDIUS	English

   The indexing process builds three Locale folders under a single CLAUDIUS collection folder, each corresponding to Italian, German, and English index results.

4. Select whether or not to **Include in Portal Search**.

   If this box is selected, then results returned from this collection will be included in the Enterprise Portal Search Results page.

5. Check the **Active Flag** to make the collection active or inactive.

   The search index process builds a search index for this collection and includes it in the search results process only if the flag is checked.

6. Enter the **Hostname** of the web server of the documents to be indexed in this Collection.

   The hostname you specify here *must* be the web server that can process HTTP requests and display the content of the documents you are about to index as part of this collection.

   If your web server is using a port other than the default port, then add a colon (:) and the port number after the hostname.

   If the documents are in the same machine as the PORTAL web server, then specify the localhost of the PORTAL web server machine.

Understanding the Purpose of Web Document Root, Alias, Actual Directory, and Target Path

These parameters are primarily used to build the hypertext reference to the indexed document. When specifying directory values, *always* use **the absolute path from the application server's point of view** since the application server processes the search index creation. Drive letters must be omitted when referring to the same drive where the application server resides.

In your web server configuration, you can define your web document tree by specifying the document root. You can also extend this by specifying an alias. Alias is used to map between URL s and file system paths. Doing so allows for content that is not directly under the document root to be served as part of the web document tree. When you're specifying Collection information using the Collection Setup page, you enter the URL path as the Alias and the file system directory as the Actual Directory.

The Target Path is the directory you want to spider. All content made up of supported file types under this directory will be indexed.

The following example illustrates why you would provide Alias and Actual Directory information in addition to the Web Document Root and Target Path for use by the indexing process. It also draws a distinction between the alias's Actual Directory and the Target Path for the files you wish to index and render in your search results. Note that that Actual Directory and the Target Path are *different* in this example.

Your web server root is C:\Program Files\Apache Group\Apache\htdocs and you want to include the files in C:\temp, which is outside the web server root directory. Your hostname is MyHost. Your web server configuration would specify:

```
Alias /MyAlias/ "C:\temp"
```

The contents of C:\temp is now included in the web document tree and may be published to the web. By using http://MyHost/MyAlias, you can see those files that are stored in the actual directory for MyAlias, which is C:\temp.

The files that you want to index, however, are in the directory, C:\temp\reports. To spider those files, you would specify C:\temp\reports as the Target Path that you want to index. In order to publish the files in the \temp\reports directory when they are returned as a search result, however, the system needs the alias information for the web server. This is because the Target Path is *outside* of the web server root.

The process uses a combination of the Web Document Root, Alias, Actual Directory and the Target Path information you provide here to construct the URL http://MyHost/MyAlias/reports, where /MyAlias/ is actually “C:\temp” and “reports” is the subdirectory under C:\temp where the indexed files are located.

7. Enter the **Web Document Root** of the web server in step 6.

   Specify an absolute path to the web document root of the web server. Omit any drive letter. Enter a path in the format \document root. For UNIX, use /document root. Web Document Root is a required field. For example, if your Apache web server configuration file has the following:

   ```
   DocumentRoot "C:/Program Files/Apache Group/Apache/htdocs"
   ```

   then specify **\Program Files\Apache Group\Apache\htdocs** as the Web Document Root.

   If your Weblogic properties file has the following:

   ```
   weblogic.httpd.documentRoot=public_html/
   ```

   Then specify **\weblogic\myserver\public_html**, assuming that \weblogic is the directory where you installed the WebLogic distribution.

8. Enter an **Alias** for the web server in step 6, if any.

   If the documents to be indexed reside in a directory outside of the web server’s root directory, then you must define an alias in the web server configuration file. The value entered here must exactly match the value defined in the configuration file. For example, if your Apache web server configuration file has the following:

   ```
   Alias /reports/ “c:\reports”
   ```

   Then specify **/reports/** as the Alias.

   If your Web Logic properties file has the following:

   ```
   weblogic.httpd.register.reports=weblogic.servlet.FileServlet

   weblogic.httpd.initArgs.reports=docHome=C:/reports
   ```

   Then specify **/reports** as the Alias.

The Alias entry must always begin with a "/" character. Otherwise, the system issues an error message when you move your cursor out of the field.

9. If an Alias was entered in step 8, you must enter the **Actual Directory** associated with it.

   Specify the directory mapped to the Alias that you provided in the previous step. The value entered here must be an absolute path. Omit any drive letters. The first character must always be either a \ or / depending on the operating system. For example, if your Apache web server configuration file has the following:

   ```
   Alias /reports/ "c:\reports"
   ```

   And this directory resides in the same machine as the application server, then specify **\reports** as the Actual Directory. Otherwise, use **\\hostname\reports.**

   If your Apache web server configuration file has the following:

   ```
   Alias /reports/  "\\FileServer\reports"
   ```

   Then specify **\\FileServer\reports** as the Actual Directory.

   If your Apache web server configuration file has the following:

   ```
   Alias /reports/  "/reports"
   ```

   Then specify /**reports** as the Actual Directory.

   If your Web Logic properties file has the following:

   ```
   weblogic.httpd.register.reports=weblogic.servlet.FileServlet

   weblogic.httpd.initArgs.reports=docHome=C:/reports
   ```

   And this directory resides in the same machine as the application server, then specify **\reports** as the Actual Directory. Otherwise, use **\\hostname\reports**.

If you enter an Alias in Step 8, you are required to enter the Actual Directory associated with it. Similarly, if you enter an Actual Directory here, you must also specify the Alias for the directory. The system issues an error message if these conditions are not met when you save the page.

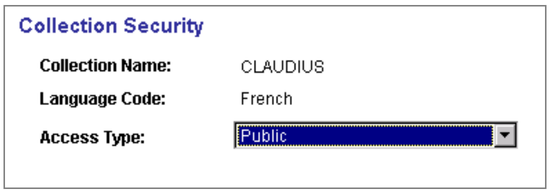
10. Enter the **Target Path**.

   Specify the file directory you want to spider as the Target Path. Omit the drive letter. For example, you may specify **\reports** if the directory is local to the application server or **\\FileServer\reports** if you want to index files under this directory. Target Path is a required field.

11. Use the **Set Collection Permission List** hyperlink if the collection requires Permission Lists.

The default setting for security is *Public*.

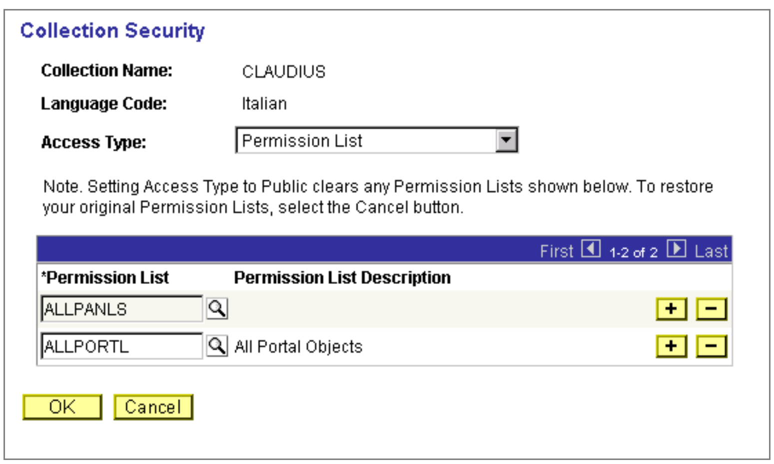
The Collection Security page appears. If you are entering permission list security for the first time for this collection, the Access Type will show the default value of *Public*.



Collection Security page with Public Access

12. Select the Access Type.

    To enter permission lists, select ***Permission List*** from the Access Type drop down list. The page changes to allow you to enter as many Permission Lists as needed. Only one is required.



Collection Security Page with Permission Lists

If the Include in Search Request box is checked and you accept the default setting for security, then all users are authorized to view results from this collection. If you specify permission lists for a collection, then only users who are members of the permission list specified would see the results from this collection.

If you select an Access Type of ***Permission List*** and fail to specify at least one permission list for your collection, the system will issue a warning message when you close the Collection Security page. The message notifies you that the system has reset the Access Type to ***Public*** for this collection. If you require permission list access for the collection, return to the Collection Security page and enter specific permission lists.

When you are finished entering or updating specific Permission Lists, select OK to record your Permission Lists changes, or Cancel to return to the Collection Security page.

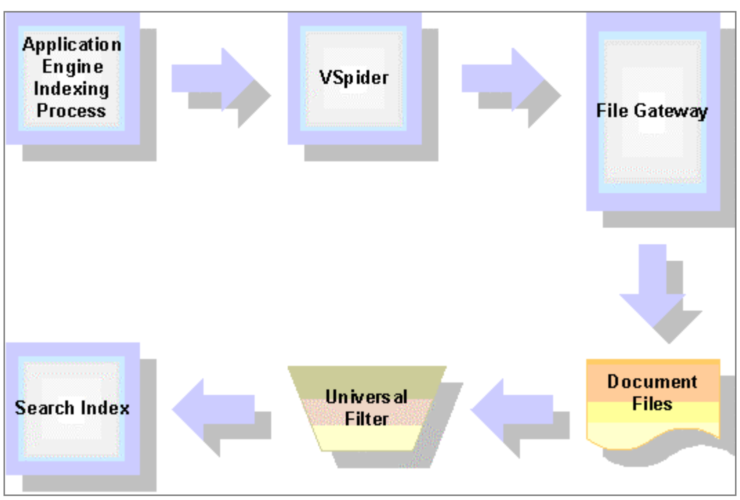
Building an Enterprise Search Index

When you initiate the indexing process from the Build Directory Search Index page, you launch an Application Engine program that:

- Deletes and creates the directories where the collection will be stored.
- Invokes the spidering command.

For this release, we are spidering file system documents that are accessed using Verity's File Gateway. The search engine detects the documents to be indexed and uses the universal filter to determine the appropriate filter to use to index the documents.

For each document in the file system the Verity engine creates a key that is the path name to the document file, which is stored in the collection. The search engine then creates the search index. The illustration below represents this process.



Overview of the File Directory Indexing Process

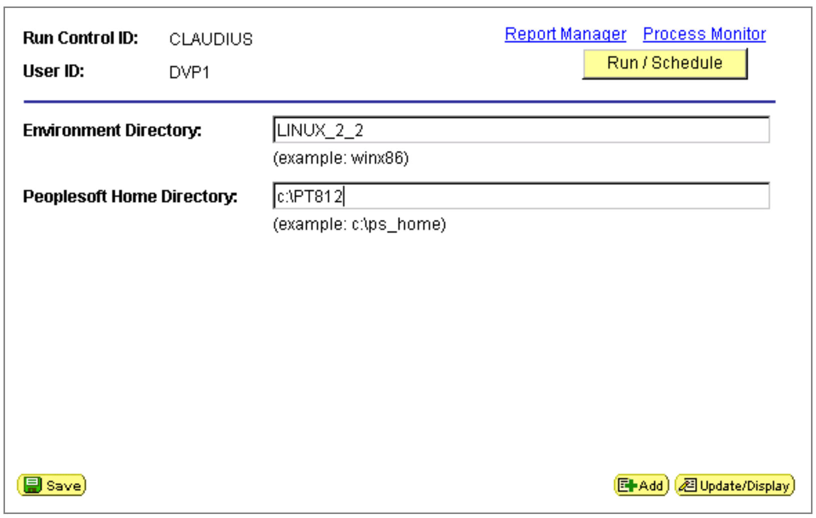
The following procedure leads you through the exact steps required to build the collection search index from the Portal Administration Build Directory Search Index page.

Each time you build the search index you are overwriting the existing search index.

To build an enterprise search collection index:

1. Click the Menu button and select Portal Administration, Search Administration, Build Directory Search Index.

   The Run Control page appears, as shown in the following screen illustration.



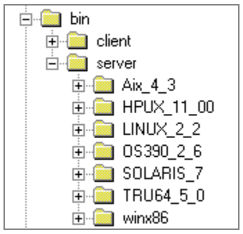
Build Search Directory Index page

2. Specify your Environment Directory.

   The Environment Directory you enter corresponds to the platform folder for your PeopleSoft installation located in the PS_HOME\bin\server directory. For example, if you are running on a Linux platform, enter *LINUX_2_2*.

Enter the directory name *exactly* as you see it in the directory structure.

Pointing to this folder enables the Build Directory Search Index process to locate the correct VSpider.exe file for your PeopleSoft environment.



Location for Environment Directories in a standard PeopleSoft installation

3. Enter the location of your PeopleSoft Home Directory.

   The information you enter must correspond to the PS_HOME directory for your installation. The indexing process uses this information to establish where it should place your index collection folders when the spidering process is completed. For example, if your Home Directory is PT810, then your collection indexes will appear in separate folders under the PT810\data\search directory.

4. Click Run to launch the build process.

   When you click Run, Process Scheduler initiates an Application Engine program named RUN_EO_PE_SIDX. You can click the Process Monitor link to view the status of the index build.

When you run the Application Engine program, it creates indexes for all active collections. If you run subsequently the Build Indexes program and you've made any of your indexed collections *inactive* since you last ran the indexing process, then the process does not delete the old collection.

To verify that your indexing process completed successfully:

1. Go to the PS_HOME/data/search/PA_EPP_<index name>/<lang_cd>/spider/log directory.
2. Locate and open the file Error.txt. Ensure that it is blank.
3. Locate and open the file Progress.txt. Near the end of the file, you'll find a Vspider summary, which details the number of files indexed and included in the collection.

If the file contain errors, recheck your collection and run control settings. Then rerun the process.

We recommend that you first review the process monitor's message log for the process instance you are running. Perform the steps outlined above only when you need specific details.

Submitting Search Requests

Submitting search requests in the PeopleSoft portal is quite simple. This section discusses the basic procedure for executing a search.

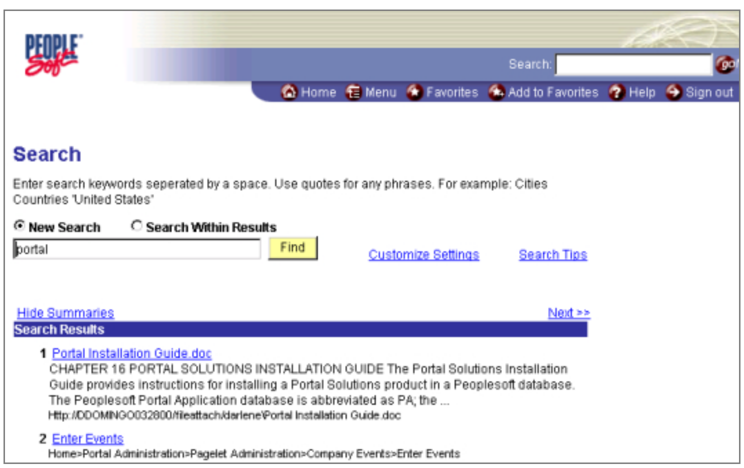
To submit a search request:

1. Enter a search string in the portal header and click **go!**

Submitting a search request

The search request is *not* case-sensitive. Any query sting you enter will be converted to all upper case before it is submitted to the search engine. This helps to avoid mixed-case searches that return no results.

After you click **go!**, the portal processes your request and displays the search results page. If you click **go!** without having entered a query string, no results appear on the search results page.



Enterprise Portal Search Results page

The following fields appear for each reference returned by the search results page:

Reference Label	Click this link to access the content.
Description	Displays the description that you entered for a portal content reference. If your search returned an indexed file, then the description shown on the page for that search result is made up of a compilation of the three sentences in the document selected by the indexing process's summarization routine. This description cannot exceed 250 bytes.
Path	For content references, it displays the menu navigation. For file system documents, it displays the URL in the form http://hostname/subdirectory/file.ext or http://hostname/alias/subdirectory/file.ext if an alias is used.

2. Select the item you were searching for.

   Click the link that corresponds to the desired content. The portal then navigates you directly to the content you selected.

If the content is a file, the system opens the file and displays it correctly by type using the browser's plugin.

What Happens When a User Clicks "Go!"

You submit a search request by entering a search string in the search input form field of the portal header. The <form action=...> in the portal header is generated at runtime to link to a PIA page, and a Java script submits the form. The query string is passed to the Search API as a parameter named PortalSearchQuery to find matching results. The Portal Registry API filters the results for security through PeopleCode for portal registry collection. The results are also filtered for security based on the permission lists (defined by the search administrator) that are specified for the collections. The search results page echoes the user's original query string and displays a list of content that match the request. If the user clicks the ***go!*** button but does not enter a search query, the system displays the search results page without any results.

The search results page performs the following:

- Changes the case of the entered text to all upper case characters.

  By default, the Verity search engine searches for all mixed-case variations when a query string is entered in all lower case or in all upper case. However, search queries entered in mixed-case automatically become case-sensitive. (For example, a query on *Apple* behaves as if the user had specified *Apple*—which would find only the precise string *Apple*—while a query on *apple* finds *APPLE*, *Apple*, and *apple*.) But the portal makes one important change: It changes the case of the query sting to all upper-case, prohibiting users from truly executing case-sensitive searches. This avoids situations where mixed-case searches would otherwise return no results. On the search results page, however, the original case is echoed back to the user.

- Formats the query string to pass to the Search API.

  This includes filtering out expired and hidden content references, and content references that are not yet valid.

- Calls the Search API for the Portal Search and any indexes that were included in the portal registry search from the Administration page.

  This returns the search results for all of the searched indexes. Since each search collection result is weighted according to the results from the same collection, the Enterprise Portal Search Results page compares each item's score with search results of other collections and determines the top matches. The results are listed in order of the most relevant to the query regardless of whether the result came from the portal registry search index or other search indexes.

- Calls the Portal Registry API.

  This applies security filtering to the results that originated from the portal registry search index. Security is applied in PeopleCode by checking the *Authorized* property.

- Formats and displays search results.

  PeopleCode retrieves the search collection result key, which is formatted according to the fields expected in the search results page. This completes the user's search request.

Formatting the Hypertext Reference for Documents

Results generated from any of the collections defined in the Administration page are formatted according to these rules.

Because the application server runs the index creation process using the *Target Path,* then the returned key uses the format *\Target Path\directory\[sub-directory]\file.ext*. In order to form the correct hypertext reference for each result item, this process first removes the web document root from the key and then scans the key for any occurrence of the Actual Directory and substitutes it with the Alias. This is why it is important to fill the Web Document Root and Actual Directory fields in the administration page with an absolute path from the application server's perspective. For example, consider the following values defined in the administration page,

```
File Server Hostname: MYSERVER

Web Document Root:  \Program Files\Apache Group\Apache\htdocs

Target Path:  \Program Files\Apache Group\Apache\htdocs\peoplesoft8\reports
```

For documents under \Program Files\Apache Group\Apache\htdocs\peoplesoft8\reports, the search API returns the following key: *\Program Files\Apache Group\Apache\htdocs\peoplesoft8\reports\file.ext*. This process removes any occurrence of \Program Files\Apache Group\Apache\htdocs from the key to come up with the following hypertext reference: **http://MYSERVER/peoplesoft8\reports/file.ext**.

If you define the following values in the administration page and the application server is in a different machine:

```
File Server Hostname: RTNTAS07:7001

Web Document Root:  \\Rtntas07\Weblogic where Weblogic is a shared name.
```

Rtntas07 web configuration file may actually specify a document root of public_html/, which is the relative path to \weblogic\myserver\public_html. However, the application server has access to this directory only through its shared name Weblogic.

```
Alias:  /reports

Actual Directory:  \\Pant361\C\Reports where C is a shared name

Target Path:  \\Pant361\C\Reports\ManagerReports where C is a shared name
```

Then for documents under \\Pant361\C\Reports\ManagerReports, the search API returns the following key: *\\Pant361\C\Reports\ManagerReports\[subdirectory]\file.ext*. This process removes any occurrence of \\Rtntas07\Weblogic from the key if present then substitutes \\Pant361\C\Reports with /reports to come up with the following hypertext reference: **http://RTNTAS07:7001/reports/**[**subdirectory**]**\file.ext**.

Failure to adhere to these rules may cause the search results page to render a bad URL.

Protecting your Server Files

You can secure access to your file system directories by configuring the file system's web server to accept requests only from one IP address, that of the portal web server. To do this, you must add a block to your web server's configuration denying access to all by default and then allowing requests only from the portal web server.

For example, if you are using an Apache web server, to forbid default access to file system locations except for the portal, specify the following:

```
<Directory >

     Order Deny,Allow

     Deny from all

     Allow from <Specify IP address>

</Directory>
```

To block a specific directory you can specify:

```
<Directory "C:/Program Files/Apache Group/Apache/htdocs/peoplesoft8/reports">

     Order Deny,Allow
```

```
     Deny from all

     Allow from <Specify IP address>

</Directory>
```

CHAPTER 18

Understanding Common Functions That Reference a Password Data Store

This chapter is intended for programmers. It describes the common functions that are used to reference a password database store. These functions can help achieve a single signon point between the portal and other software.

There are three common functions:

1. A function used for inserting and updating.

2. A function used for a search that returns the user name and password associated with a URL identifier and a portal User ID.

3. A function used for deleting.

Functions

Function: InsertUpdateUsrNamePsswd

Syntax

InsertUpdateUsrNamePsswd(URL_ID, EO_PE_USER_NAME, EO_PE_PASSWORD)

Description

The InsertUpdateUsrNamePsswd function takes the URL identifier (URL_ID) and the portal user ID (PRTL_USER_ID) and searches the table for an entry that already exists. If an entry exists, an update is performed; otherwise, if no entry exists, a new entry is inserted.

The values for the user ID (EO_PE_USER_NAME) and password (EO_PE_PASSWORD) associated with the URL_ID and PRTL_USER_ID are encrypted when placed in the table.

Parameters

Parameter	*Description*
URL_ID	The URL Identifier.
EO_PE_USER_NAME	The user name needed to access the account referenced by the URL_ID.
EO_PE_PASSWORD	The password associated with the EO_PE_USER_NAME.

Returns

The function returns no value.

Example

In this example, the function is used with hard-coded values. In most cases, variables would be used as parameters.

InsertUpdateUsrNamePsswd("Yahoo_Mail_Account", "Name", "Password");

Name and password will be encrypted and placed in the table. The table will appear as follows:

URL_ID	PRTL_USER_ID	EO_PE_USER_ NAME	EO_PE_ PASSWORD
Yahoo_Mail_Account	Portal Login Name	ASDFG#$%MDSF	ASKDKFJ@W#$RFGMS

Technical Design

PeopleCode

```
Function InsertUpdateUsrNamePsswd(&URL_ID, &EO_PE_USER_NAME, &EO_PE_PASSWORD)


   &found = "";


   &PRTL_USER_ID = %UserId;


   &EO_PE_USER_NAME = Encrypt("", &EO_PE_USER_NAME);

    &EO_PE_PASSWORD = Encrypt("", &EO_PE_PASSWORD);


   SQLExec("select EO_PE_USER_NAME from PS_EO_PE_SS_LOGIN

   where URL_ID = :1 and PRTL_USER_ID = :2", &URL_ID, &PRTL_USER_ID,
```

```
        &found);



        If &found = "" Then

        SQLExec("INSERT INTO PS_EO_PE_SS_LOGIN( URL_ID, PRTL_USER_ID,

        EO_PE_USER_NAME, EO_PE_PASSWORD) values(:1, :2, :3, :4)",

        &URL_ID, &PRTL_USER_ID, &EO_PE_USER_NAME, &EO_PE_PASSWORD);

        Else

        SQLExec("UPDATE PS_EO_PE_SS_LOGIN SET EO_PE_USER_NAME = :1,

        EO_PE_PASSWORD = :2 WHERE URL_ID = :3 AND PRTL_USER_ID = :4",

        &EO_PE_USER_NAME, &EO_PE_PASSWORD, &URL_ID, &PRTL_USER_ID);

        End-If;


    End-Function;
```

Function: GetUsrNamePsswd

Syntax

GetUsrNamePsswd(URL_ID, EO_PE_USER_NAME, EO_PE_PASSWORD);

Description

The function GetUsrNamePsswd takes the URL_ID and PRTL_USER_ID and searches the table for the associated EO_PE_USER_ID and EO_PE_PASSWORD. GetUsrNamePsswd decrypts EO_PE_USER_ID and EO_PE_PASSWORD. The decrypted user ID and password are passed back.

Parameters

Parameter	***Description***
URL_ID	URL Identifier.
EO_PE_USER_ NAME	An empty variable used to store the value for the User Name associated with the URL_ID. As a result, the decrypted value can be retrieved from the function without using a return.

Parameter	Description
EO_PE_ PASSWORD	An empty variable used to store the value for the Password associated with the URL_ID. As a result, the decrypted value can be retrieved from the function without using a return.

Returns

The function returns no value.

Example

The value for URL_ID is hard coded. Usually, this parameter would be a variable.

&UserName = “”;

&Password = “”;
GetUsrNamePsswd(“Yahoo_Mail_Account”, UserName, Password);

Technical Design

PeopleCode

```
Function GetUsrNamePsswd(&URL_ID, &EO_PE_USER_NAME, &EO_PE_PASSWORD)


   &PRTL_USER_ID = %UserId;


   SQLExec("select EO_PE_USER_NAME, EO_PE_PASSWORD from
   PS_EO_PE_SS_LOGIN where URL_ID = :1, and PRTL_USER_ID = :2",
   &URL_ID, &PRTL_USER_ID, &EO_PE_USER_NAME, &EO_PE_PASSWORD);


   &EO_PE_USER_NAME = Decrypt("", &EO_PE_USER_NAME);
   &EO_PE_PASSWORD = Decrypt("", &EO_PE_PASSWORD);


End-Function;
```

Function: DeleteUsrNamePsswd

Syntax

DeleteUsrNamePsswd(&URL_ID);

Description

The DeleteUsrNamePsswd deletes entries in the table by searching with the URL_ID and the PRTL_USER_ID and removing these items when it finds a match.

Parameters

Parameter	*Description*
URL_ID	The URL identifier.

Returns

The function returns no value.

Example

In this example, the value for URL_ID is hard-coded. Usually, this parameter would be a variable.

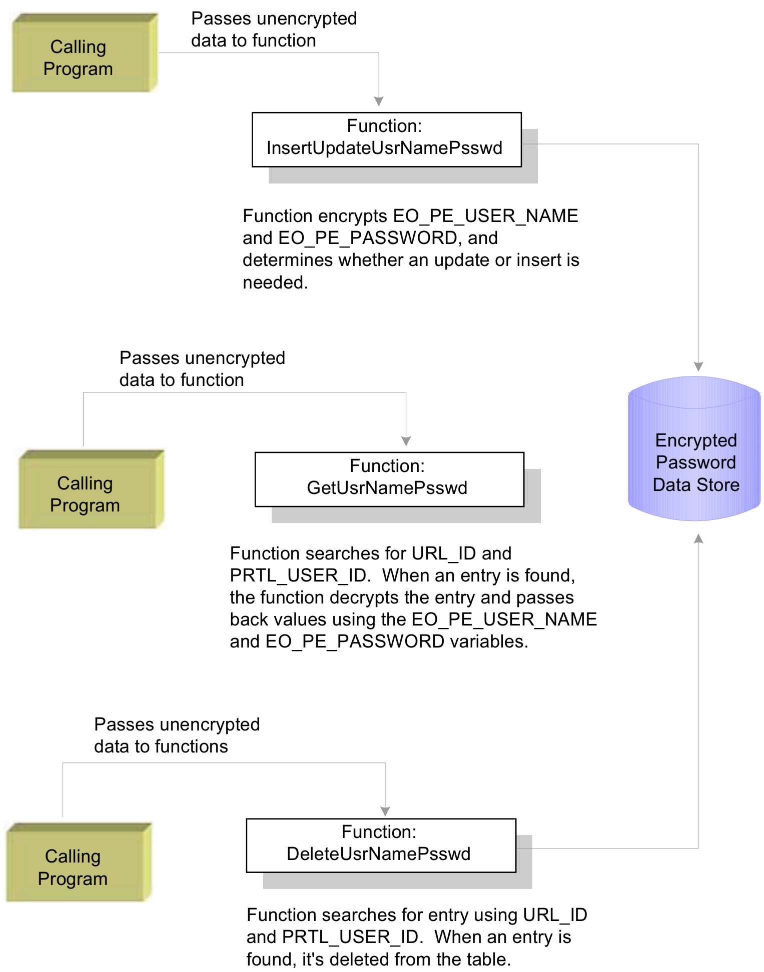
DeleteUsrNamePsswd("Yahoo_Mail_Account");

Technical Design

PeopleCode

```
Function DeleteUsrNamePsswd(&URL_ID)



   &PRTL_USER_ID = %UserId;





   SQLExec("Delete from PS_EO_PE_SS_LOGIN Where URL_ID = :1 and

   PRTL_USER_ID = :2", &URL_ID, &PRTL_USER_ID);


End-Function;
```

Single Signon Password Data Store Interaction Flow Diagram



Password Data Store Interaction Flo

Index

A

C

E

G

I

L

M

N

P

R

S

W