infoRouter Version 8.0

Portal Administrator's Guide

Contents

1) Introduction to infoRouter Portals

Web Portal Software Systems have become a very effective communication medium for sharing information and conducting business transactions with customers, vendors and partners. Portals have become gateways to information in many progressive companies where employees directly log into corporate portals to start their days.

infoRouter Web Portal Software is an integral part of the core infoRouter Enterprise Content and Document Management Software Platform. Our Portal Management System dramatically simplifies the creation and management of portals. The focus of our portals are on presenting documents and content in an effective manner to individuals, groups, customers, partners and vendors.

infoRouter Portals promote a high level of standardization and reuse of content and resources. Predetermined content in infoRouter can be easily presented in the portal without any involvement from web masters or IT staff. New or updated content in infoRouter is automatically reflected on to the portal making it virtually maintenance free. Portal content can be edited from remote locations without the involvement of technical staff.

An unlimited number of web portals can be created to serve multiple audiences. infoRouter lets you create as many portals as you wish with no limitations whatsoever. Multi-language portals to serve overseas customers and customer specific portals are among the common usage scenarios or infoRouter portals.

Key benefits of infoRouter Portals:

- Productivity gains due to increased speed in which information can be found. Increased collaboration

- Easy access to enterprise resources

- Increased effectiveness

- Ability to quickly build custom portals for multiple audiences

Key usage scenarios of Web Portals:

- Knowledge Management Portals

- Management Portals for Executives and Managers

- Customer portals

- Employee portals

- Partner portals

- Project portals

- Self-service portals

2) How to create Portals

Only the "System Admistrators" can create infoRouter portals. Once the portal is created, the System Administrator may assign Portal Administrators to manage the portal.

To create an infoRouter Portal, perform the following:

Navigate to the "Control Panel"

Click on the "Portals" link.

Click on the "New Portal" link from the tool bar.

In the "New Portal" window, perform the following

Select a "Template" portal from the "Model Portal" drop down control.

The default template that is used when creating a new portal is called "Template". You may choose any of the available portals as your starting point by selecting it as your "Model Portal".

Enter a "Name" for the new portal.

Click "Ok" to create the new portal.

Setting up Portal Administrators:

The System Administrator may assign "Portal Administrators" to manage the day-to-day maintenance of portals. To setup "Portal Administrators", navigate to the portal and click on the "Management" link located on the bottom of your portal screen. Remember, this link only appears to existing Administrators and the System Administrator.

Navigate to the "Control Panel"

Click on the "Portals" link.

Select the portal to which you wish to assign administrators.

Click on the "Portal Administrators" link on the toolbar.

The "Portal Administrators" window will appear.

Click on the "Add Administrators" button.

Select one or more users from the list that appears.

Click "Ok" to add the selected users as Portal Administrators.

3) Designing Portals

Once the portal is created, you may navigate to the portal and change the layout to suit your needs.

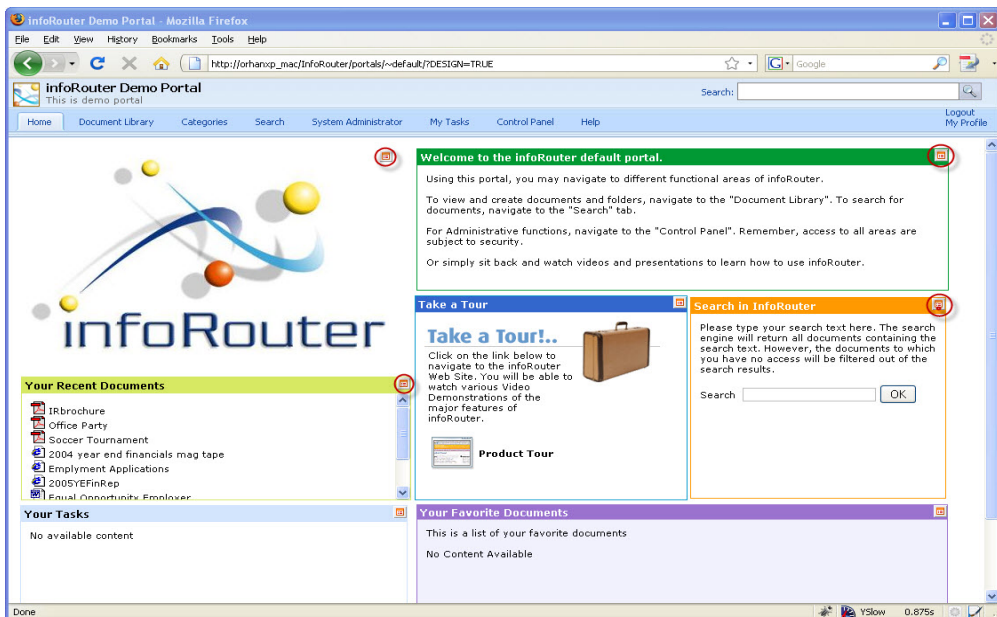## To design an infoRouter Portal, perform the following:

Create a new portal or navigate to an existing portal

Scroll to the bottom of the portal page and click on the "Design Mode" link.

Notice that a set of new links will appear in the bottom of the portal page.

When you go into the design mode, a copy of the existing portal is made. The changes you are about to make to the portal will not apply to the existing portal until you release your changes.

Notice that in design mode, a properties icon appears on the upper-right corner of each gadget on the portal. Click on this icon to display the gadget properties. Each gadget has different properties you can set to achieve the desired effect.

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3) Designing Portals (continued)

Notice that in the design mode, a new set of links appear on the bottom blue bar. Here is a list of design mode links and how they are used.

Design Mode links:

Change Layout

Click on this link to switch to "Layout" mode. In this mode, you will be able to drag portal boxes around. You may also show or hide portal gadgets in this mode.

Add New Gadget

Click on this link to display the "Add new Gadget" window. In this window, you can select from a list of built-in gadgets to add to your portal.

Edit Portal Header

Click on this link to Change or Edit the portal title, description and portal logo.

Portal Resources

Click on this link to add images and style sheets to your portal.

Rollback Changes

Click on this link to cancel your changes to the portal. This will revert the portal back to its original state.

Release Changes

Click on this link to overwrite the existing portal with the modified version.

Return to Portal

Click on this to go back to the main portal screen.

4) How to change the portal layout.

Changing the portal layout allows you to change the position of portal gadgets around the page. It also allows you to change the size of the gadgets to fit the contents.

To go into the layout mode, perform the following:

Click on the "Change Layout" link to go into the "Layout" mode.

Once in the layout mode, notice that the gadget borders will revert to a dashed style.

Move your mouse to the upper-left corner of the gadget.

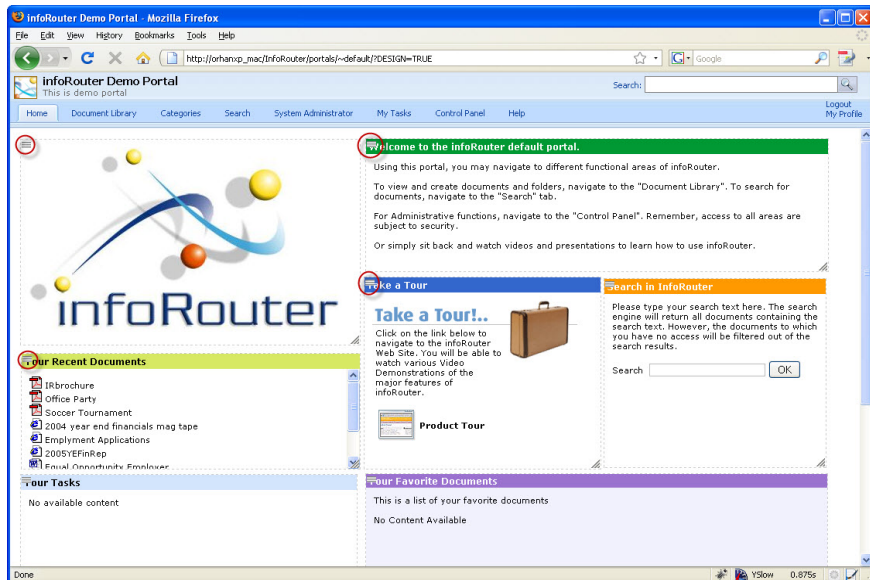Holding down your mouse key, you may move the gadget around the portal screen.

Now move your mouse to the lower-right corner of the gadget.

Holding down your mouse key, you may resize the gadget.

When finished, click on the "Save Portal Layout" link located on the blue bar

Note: Remember, even when you choose to save the layout, the portal is not affected by your changes until you choose to "release changes".

5) How to add a new gadget to the portal.

You may add to and remove gadgets from infoRouter portals. You may also have multiple instances of the same gadget on an infoRouter portal.

To add an new gadget to the portal, perform the following:

Click on the "Add New Gadget" link on the bottom blue bar.

A pop-up window will appear displaying a list of available gadgets.

Pick a gadget from the list and click on the "Ok" button to add the selected gadget to the portal.

This will display the gadget properties dialog box.

Every gadget will have a familiar but very different properties window. This is because each gadget has been designed to perform a different function.

As with other gadget properties, you may edit the "Box Title" and make adjustments to the colors and borders of the gadget.

Once you make the desired edits, click ok to add the gadget to the portal.

Notice that infoRouter will try to position the gadget to an empty spot on the portal.

If you would like to change the position of the gadget, please go into the "Layout Mode" by clicking on the "Change Layout" link located on the bottom blue bar.

6) How to edit the Portal header

Edit the portal header to change the portal title, description and the portal logo. The portal header also includes the tabs that appear on infoRouter portals. You may turn these tabs on and off from the portal header.

To edit the portal header, perform the following:

Click on the "Edit Portal Header" link located on the bottom blue bar.
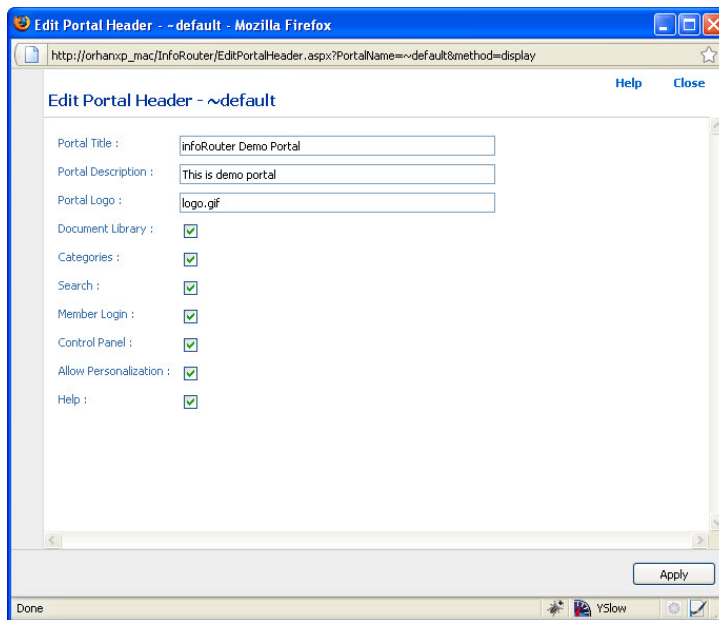
In the Portal Header window, you may edit the following:

The text fields such as the portal title and portal description

Change the name of the portal logo (The logo file must be in the portal resources)

You may also turn portal tabs on/off by checking the appropriate check boxes.

Notes: You may uncheck the "Document Library" if you would like to prevent users from navigating into the document library. Similarly, you may also disable the "Member Login" control so that users cannot login to infoRouter from this portal.
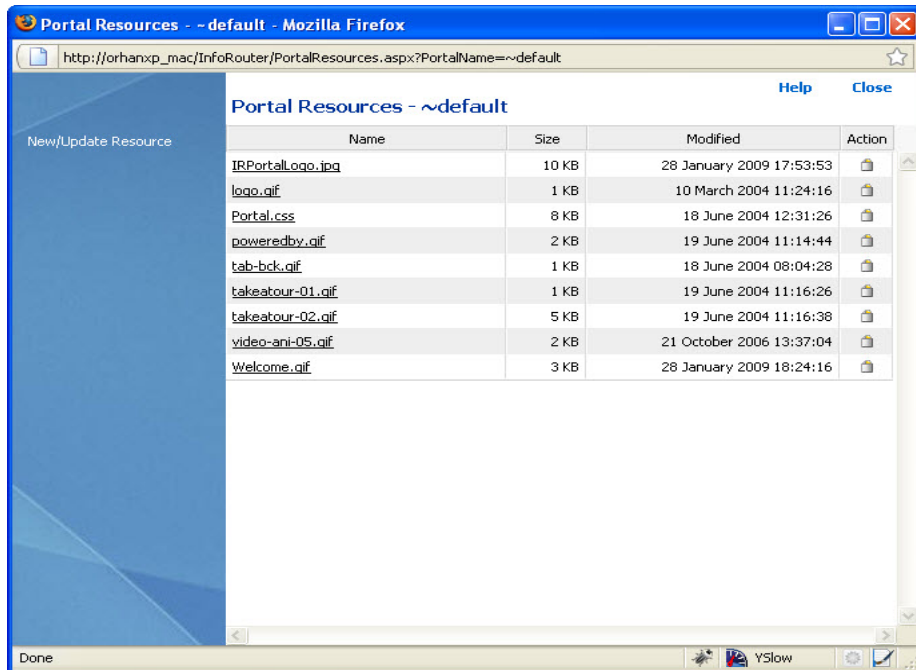
7) Portal Resources

Every portal is assigned a set of resources when it is created. The resources of the new portal are an exact copy of the template portal or the "Model Portal" used when creating the portal. The portal resources are a collection of the portal logo, the portal css and other images used in the portal.

To add or remove resources from a portal, perform the following:

Click on the "Portal Resources" link located on the bottom blue bar.

Remove any of the unwanted portal resources by click on the "trash" icon located on the action column for each resource.

To add any resources, click on the "browse" button to display the contents of your local disk. Select the resource and click on the upload button. Notice that if you choose a resource with the same name to upload, infoRouter will overwrite the existing resource with the new one.

Name	Size	Modified	Action
IRPortalLogo.jpg	10 KB	28 January 2009 17:53:53	
logo.gif	1 KB	10 March 2004 11:24:16	
Portal.css	8 KB	18 June 2004 12:31:26	
poweredby.gif	2 KB	19 June 2004 11:14:44	
tab-bck.gif	1 KB	18 June 2004 08:04:28	
takeatour-01.gif	1 KB	19 June 2004 11:16:26	
takeatour-02.gif	5 KB	19 June 2004 11:16:38	
video-ani-05.gif	2 KB	21 October 2006 13:37:04	
Welcome.gif	3 KB	28 January 2009 18:24:16	

8) Rollback changes.

Use this option if you wish to discard the changes you have made to the portal.
As indicated earlier, all changes to portals are made to a copy of the original portal so when you choose to rollback changes, the copy of the portal is simply deleted .

9) Release changes.

Use this option if you wish to make your changes to the portal permanent.

When you click on the "Release changes" link, located on the bottom blue bar, a pop-up window appears to confirm your choice. Notice that a checkbox with the "Reset user personalizations" label appears.

In portals where "Allow Personalization" is checked, users may edit portals. Their edited versions are kept and displayed only to these users. If you choose to reset user personalizations, this action will not only create a new version of the portal, it will also force a reset of all instances of this portal that was edited by users.

Use caution when selecting this option as there is no way for these users to get their versions of this portal back.