Administration Guide

Portaneo Enterprise Edition
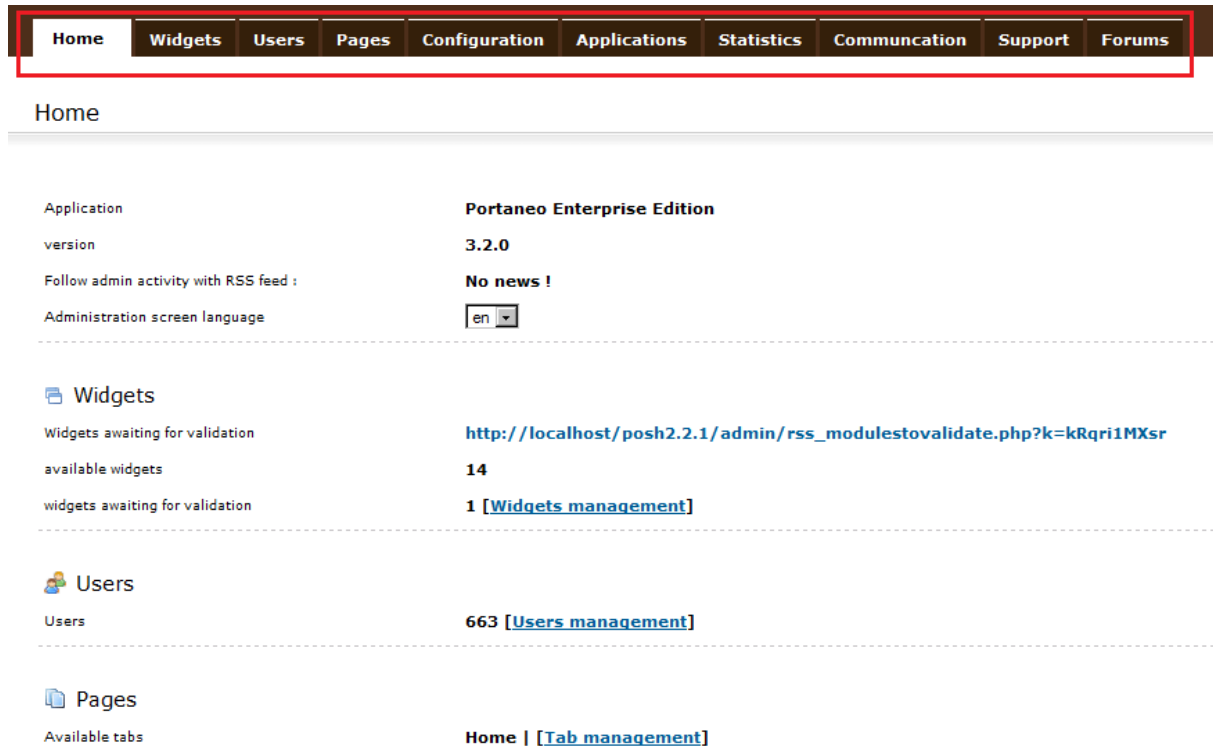
V1.2.2 – march 2009

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To open the administration panel, you have to click on the « administration interface » link, display on top right of your portal. If the link is missing, you do not have enough priviledge to access administration panel.

The administration panel opens with the administration dashboard. All administration features are managable by clicking on the concerned tab :

- Home : Administration dashboard
- Widgets : Widgets management tools (validation, modification, categories, access)
- Users : Users management tools (creation, modification, groups)
- Pages : Tabs management
- Configuration : Application configuration (styles, plugins, connections, languages, ...)
- Statistics : Application statistics
- Communication : Administrator communication to the users (information bar, emails, ….)

1- Users management

To manage users, click on the « users » tab in the admin panel.

1.1- Users' groups management

Groups creation is not mandatory, you can manage users without adding them in groups.

By using groups, you can :
- manage the users access to the widgets libraries
- defin default pages for the members of each groups (page content, design, ...)

1.1.1 Display groups list

To display the groups list, click on the sub tab « Groups ».
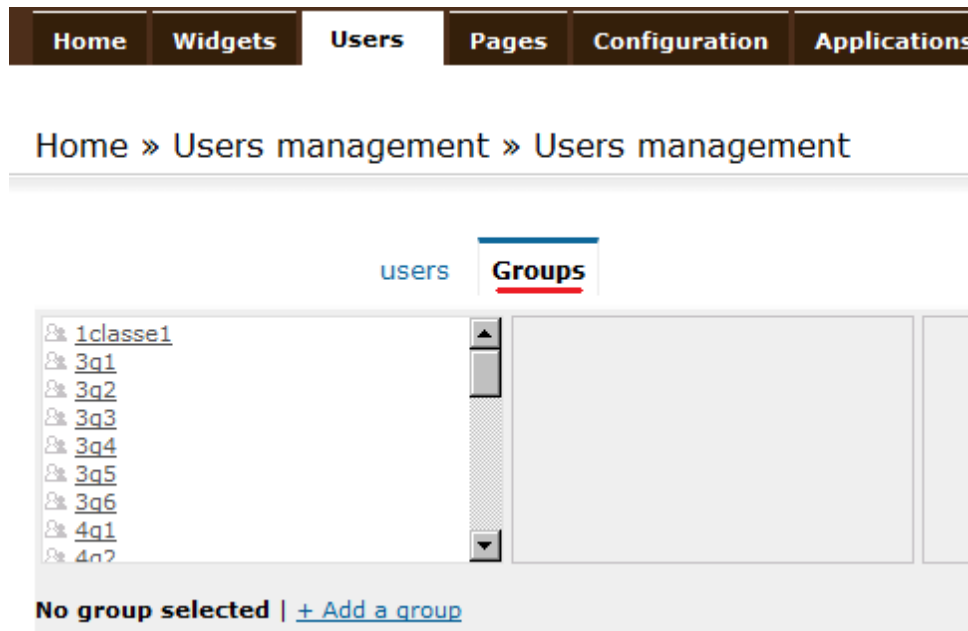
By clicking on groups, you navigate through all the groups / sub-groups / sub-sub-groups / …, and display members of the groups.

1.1.2 Adding a group / Sub-group

To add a group, click on the « group » sub-tab, and then click on « + add a group »
Type the group name, and click on « add » button. The new group appear in the groups list.

To add a sub-group, select the parent group, and click on the « + Add a sub-group » link.
Type the sub-group name in the form, and click on « add » button. The new sub-group appear in the group list.

1.1.3 Modify a group name

Select the group you want to modify, and click on the « Modify » link. Type the new group name in the form, and click on « modify » button.
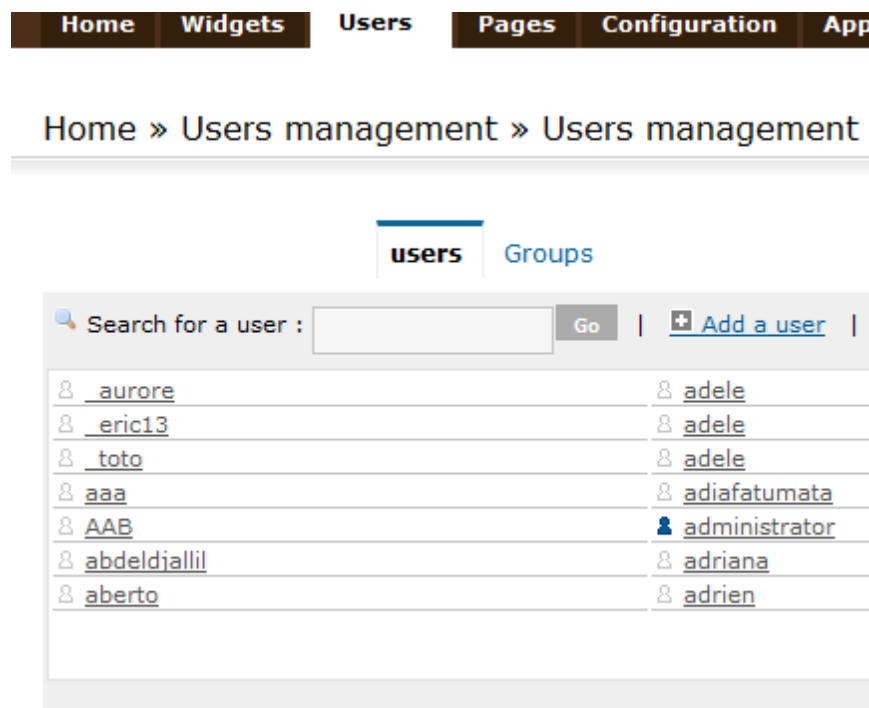
1.1.4 Remove a group

Select the group you want to remove, and click on the « Suppress » link. Confirm you really want to remove this group by clicking on « ok » button.

1.1.5 Move a sub-group

Select the group you want to move, and click on the « move » link. Then, select the destination group, and click on « move » button.

1.2- Users management

1.2.1 Adding a user

To add a user, you need to click on the « Users » tab, the click on the « + Add a user » link. A new form appear :
– Email : User account based on the email
– Name : real name that will be displayed in the user portal
– Password : User password. Repeat it on next line.
– User type : administrator or user. And administrator can access the admin panel, for the tab defined in this form.

- Notify the user : If checked, the user will receive an email confirming he can now log in Portaneo
- Selected groups : In this input fields, add the groups the user is member of, by selecting them in « all the groups » field, and clicking on « < » button. You can remove a group from this input field, just select the group and click on « > » button.

Save the user by clicking on the « add » button

1.2.2 Modify a user

Select the user in the users list, and modify his properties in the form, and click on « save changes » button
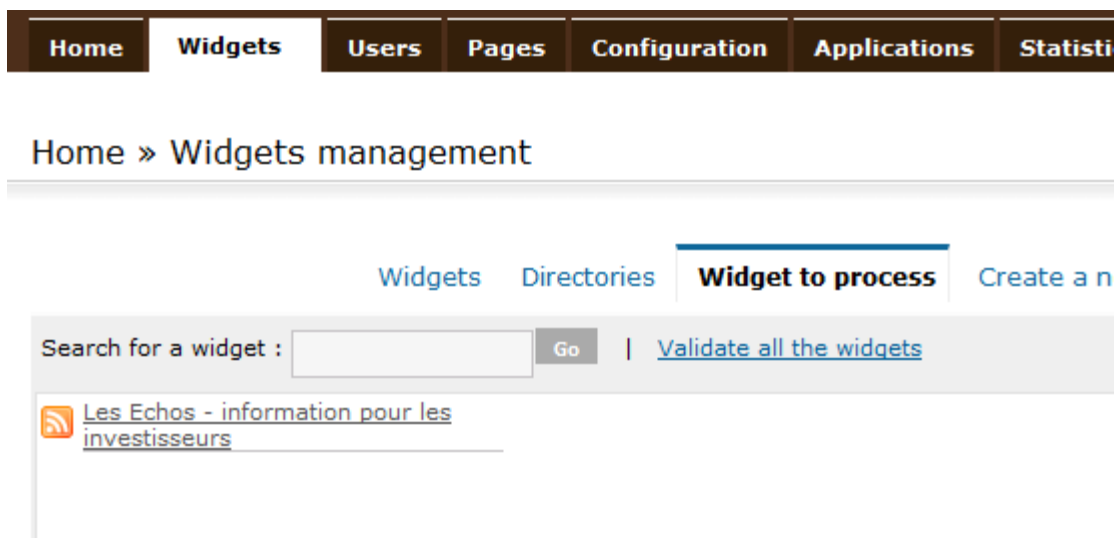
1.2.3 Remove a user

Select the user you want to remove, and click on the link « delete this user » on the bottom of the form.

Attention : The user removed loose permanently all his tabs.

2- Widget management
2.1- Widget validation

To validate widget, then make them available for the users, you have to click on the « widget to process » tab. Then, select the widget you want to validate.

On the left part of the form, the widget is displayed. If the widget can contain malicious code, the message « This widget can impact your Portaneo if contaning mischievous scripts. Are you sure you want to display this widget ? » appear instead of the widget content.

If you are confident with this widget, click on « yes », instead click on « display source code » and check manually the code.

On the right part of the form, you can change the information typed by the widget author :
- Title : title displayed above the widget in the users portals
- Description : description displayed below the widget in the widget overview
- Url : url of the widget file
- Height: default height of the widget
- Minimal width : minimal width of the widget
- Tags : define tags linked to the widget to help user find this widget through the widget search engine.

2.2- **Widget directories management**
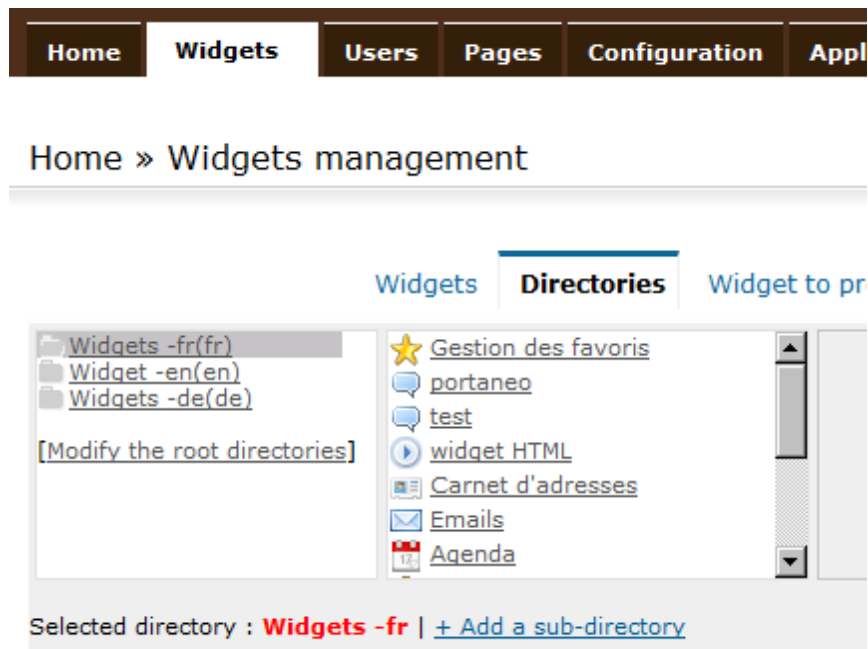
A directory is a group of widgets, to organize the widget library in the users portals.
To manage these directories, click on the « directories » sub-tab.

2.2.1   **Adding / modifying a root directory**

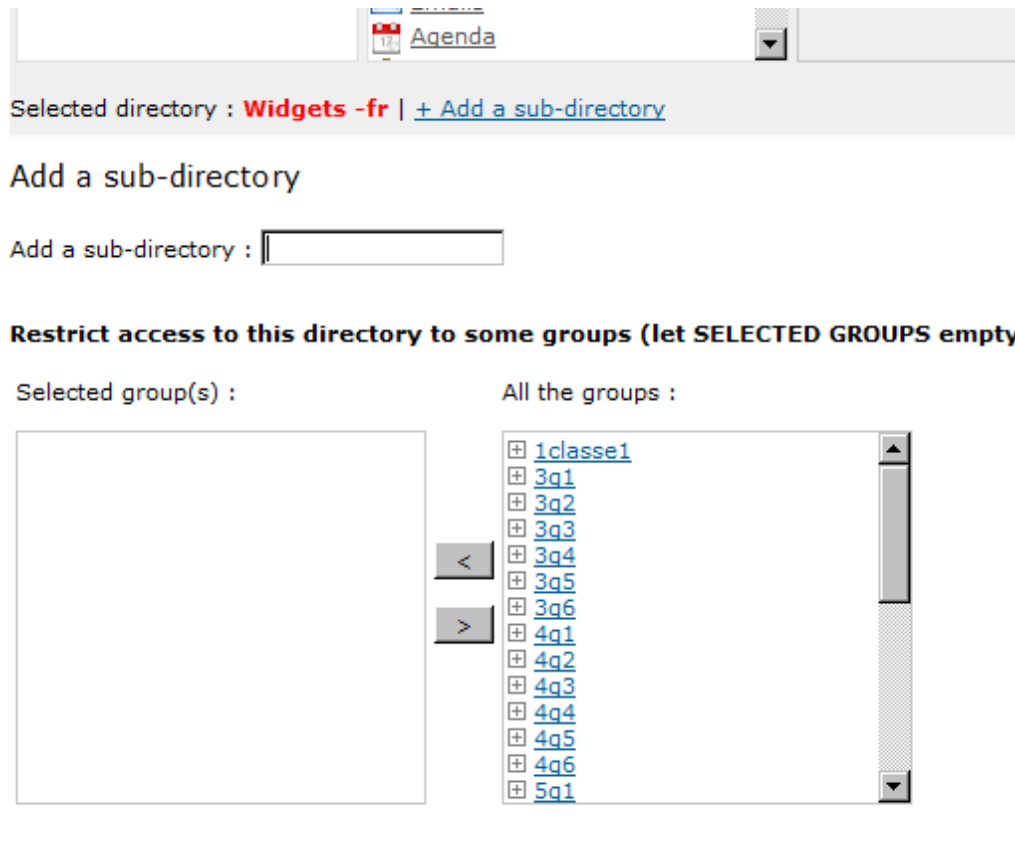Root directories are the directories of the first box on the left.
Click on « Modify the root directory » to manage these root directory.
In the form, you can change the directory name, the directory language, change the order of the directories in the list, or remove a directory. Click on the « save changes » button to save.

To add a new directory, type its name and language in the form on the bottom, and save.

The language is used when you configure the library to display only directory for the user's language. Then, for a german user, only « ge » root directories will be displayed.

2.2.2 Add a sub-directory

Select the directory where you want to add a sub-directory, and click on « + add a sub-directory » link.
Type the title of this new sub-directory, and add in the « Selected group(s) » input fields the groups that can access this directory (only users of these groups will view and will be able to add the widgets of this directory in their portal). If you let it blank, this sub-directory is public, so accessible by all the users.

Save the sub-directory by clicking on « add » button

2.2.3 Modify a sub-directory

Select the sub-directory that you want to modify, and click on the « modify » link. Change the title of the sub-directory and/or add new groups that can access the widgets of this directory, and click on « modify » to save.

2.2.4 Remove a sub-directory

Select the sub-directory you want to remove, and click on « remove » link.

2.2.5 Move a sub-directory

Select the sub-directory to move, then click on « move » link. Then, select the parent destination directory, and click on the « move » button..

2.3- Widgets management

Click on the « widgets » tab to manage the widgets.

2.3.1 Adding a widget

To create a new widget, click on the « create a new widget » sub-tab. Widget creation tutorials are then proposed depending on the widget type you choose.

2.3.2 Modify a widget

Select the widget you want to modify. A form appear on the bottom, allowing you to change following properties of the widget :
- Title : Title displayed on the widget bar above the widget
- Description : Description displayed on the widget overview screen
- URL : url of the file of the widget
- Type : not used anymore
- Status : you can hide temporally the widget by changing the status to « inactive »
- Height : Widget default height (most of the time, the widget is automatically resized depending on its content
- Minimal width : Minimal width of the widget. Final width is automatically defined depending on your screen width.
- Directory : directory of the widget

Moreover, you can add tags, choose icon, duplicate or remove the widget.
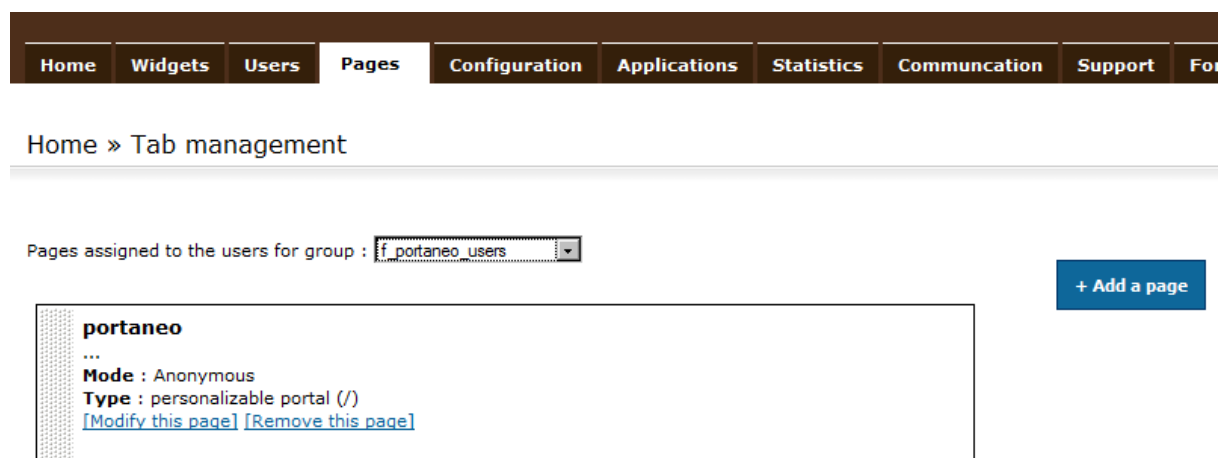
2.3.3   Remove a widget

See §2.3.2 « modify a widget ». A link is proposed on the bottom of the widget modification form to remove the widget.

3- Page management

Each Portaneo user can customize his page. Meanwhile, administrator can define default pages for users members of defined groups. These pages can be unremovable, unchangeable (widgets are blocked).

To manage these page, click on the « Pages » tab, in the administration panel.

| Home | Widgets | Users | **Pages** | Configuration | Applications | Statistics | Communcation | Support | Fo |

Home » Tab management

Pages assigned to the users for group : [f_portaneo_users] ▼

[+ Add a page]

portaneo
...
Mode : Anonymous
Type : personalizable portal (/)
[Modify this page] [Remove this page]

To create a new page (or tab), you need first to define which group will get this page. For that, select in the drop-down list the group concern (if you the « --all (default)-- » value, the page will be available for all users).

Then click, on « + add a page » button.

A new page appear, an let you define the properties and the widget of the page :
 – Name : title of the page (displayed in the tab)
 – Description : only used to inform other administrator the meaning of this page. Not displayed to the users.
 – Allow users to remove this page : if checked, users can remove the tab. Else the link « remove this page », in the users portal, will not be displayed.
 – Apply to futur users : only users created in the futur will get this page
 – Aligned widgets : if unchecked, the widget are freely placed in the page (no columns)
 – Block this page : if check, widgets and pages are not changeable / removable
 – Show widget title bar : display the title bar above the widget. This bar is also used to move the widgets.

Once the properties defined, add / remove the widget, just as if you were in a user portal.

Once the page configured, click on the « save your page » button.

4- Application settings
4.1- General settings

| Home | Widgets | Users | Pages | Configuration | Applications | Statistics | Communcation |

Home » Application settings » General settings

Directories rights control :

[Test]

Your application :

▸ Application name — POSH 2.2.1

▸ Application root — http://localhost/posh2.2.1/

▸ Users can create widgets — ☑

Database connection :

▸ Server — localhost

▸ Login — root

▸ Password — •••••••

▸ Database — posh221

To change the general settings, click on the « configuration » tab, and click on « general settings » link.
A new page, with the common settings, is displayed and let you configurate your application.

On the bottom, a link « advanced options » let you configured all the settings of the application, and not only the more common.
To get a list of these settings, please refere to the « Portaneo settings » documentation

4.2- Themes management

To change the design of Portaneo, click on the « configuration » tab, and on the « themes management » link.
You have 2 options to change the Portaneo design :
  – Templates : A template is the HTML structure of the portal. To Change a template, just select the template in the templates list (templates are defined in the /templates/ directory, each template corresponding to a sub-directory). To know more about template and how to create yours, please contact Portaneo.
  – A theme is a CSS file that manage the widget design, the logo, the header design and dimensions, the footer, the menu, … You can define all the design of the page through the theme. The only limitation is the place of each element (header, tabs, widgets are), but that you can manage with a template.

4.2.1   Define the themes of the application

The themes of the application are the one listed in the « Selected themes » box. The default one is the first of the list. The other ones will be available for the users, through the portal options (see Portaneo user guide). To change the order of the themes, use the arrow on the right of each theme of the « Selected themes » box.

To add a new theme in the « Selected themes » box, select it in the « available themes » box, and click on « < » button.
To remove a theme from the application, select the theme from the « Selected themes » box, and click on « > » button.

Once the selection is the one you want, click on « Save changes » to apply all your changes.

To learn how to create a new theme, and add it in « available themes » input cell, please contact Portaneo.

4.3- **Plug-ins management**

To add / remove / configure plugins, click on the « configuration » tab, and click on the « plugins management » link.

The list of the plugins available / activated appear, the activated plugins are checked.
You can activate / disable the plugin by checking / unchecking the plugin, and clicking on « save changes » button.
Please read carefully the plugins recommandations before activating a plugin. Once activated, the plugin available in the application.

All the plugins are installed in the /includes/plugins/ Portaneo folder.

To learn how to create a plugin, please contact Portaneo.

5- Statistics

Some statistics about the usage of Portaneo are available in the « statistics » tab :

Statistics (general)
- Unique visitors : Number of users that connect on Portaneo on a specific day / month.
- Users : number of new users on a specific day / month
- Activity : Number of pages displayed on a specific day / month

Statistiques (widgets)
- top 50 widgets: 50 widgets (except RSS feeds) the most displayed in users portals
- top 50 Directory RSS feeds : 50 RSS feeds of the widget library the most displayed by users
- top 50 RSS feeds added by users: 50 RSS feeds added by the users, the most read by users

6- Communication

6.1- Information bar

You can display an information bar (bar displayed on the bottom of the users portal with text defined by administrator) to warn users about new feature, important information, application maintenance, …

Options :
- Nothing: This information bar is not displayed
- Text / HTML code : Type your text / HTML code like you want it to be displayed to the users.
- Feed URL : each articles of this RSS feed will be displayed 5 seconds.

6.2- Emailing

This interface help you sending email notification to all Portaneo users, or to some of these users.