



User Guide

Portaneo Enterprise Portal Version 3.1

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Introduction to Portaneo

Why use Portaneo?

Portaneo is a collaborative, customisable portal that enables you to organise information more easily and share it with your team or any other users.

Functionality is provided with a combination of integrated features:

- a customisable portal, pre-configured according to your profile, that you can organise to suit your own needs, using easy-to-add dynamic tools called *widgets*, chosen from a library. Everything important to you — information, search engines, co-worker news, in-house applications, email, video, photos, etc. — is automatically updated whenever you visit.
- collaborative notebooks where any information from your portal (articles, events, tasks, etc.) can be easily stored, shared, and found. These contributions from all Portaneo users grow into a knowledge base accessible via its own search engine.
- a social network that makes it easy to establish links between you and others in your organisation that are relevant for your work (business intelligence, swapping information, joint projects, etc.).

Since the user interface is presented with standard, web-based elements that are already well known, users can become familiar with the application very easily.

The following documents are intended to provide a more advanced or in-depth understanding of Portaneo:

- Overview: Brief tour of Portaneo.
- Getting started: Description of basic Portaneo functionality.
- User guide: Details of all Portaneo functionality

Requirements


Portaneo can be used from any computer, with any of the following browsers:

- Firefox 1, 2 and 3
- Internet Explorer 6, 7 and 8

Portaneo can also be used with Google Chrome, Safari and Opera, but these browsers are not specifically supported so compatibility is not guaranteed.

Terminology

RSS

 An RSS feed allows file-based data provision from an information source to software tools allowing it to be read or otherwise used.

Here, RSS feeds are provided by an internet site or a site on your intranet. An example can be found on the Le Monde web site. Go to <http://www.lemonde.fr> and you will see an "RSS" link at the foot of the home page. The link lets you access information available through the lemonde.fr website, which you can add to your portal as described later in this guide.

With RSS, you no longer have to visit your favourite sites one at a time to see if there is any news - just add their RSS feeds to your Portaneo portal to get details from all your information sources brought together on one screen!

Tags

Tags are words or terms that can be used to describe an item of news or information, or a person, or an object.

For example, a news item describing a new material for manufacturing skis can be "tagged" with these terms: ski, material, innovative, innovation, sport

Then anyone entering one of those tags into the search engine will find the tagged information.

Widgets

A widget is a small program that displays in a limited area of a web page (usually in a small rectangle) and is more-or-less independent from other items on the page. For example, here is a "weather" widget:



Widgets provide information that can be read quickly, as well as hypertext links to further information available. So, widgets are particularly well-suited for use on information dashboards.

Overview

Portaneo starting point

Depending on the configuration set by the administrator, the home page is either a dashboard showing activity within your Portaneo, or one of the pages within your portal.

In the case of a dashboard, the page is formatted like this:

Home - Hi Eric Mathieu

Inform or question users that are following you 1

Manage your personal information | Manage your network | Manage your groups | Notebook

Did you know ?
You can follow comments on your notebook with the dedicated widget, available on your notebook

Discussions People I am following | Groups | Top News | All

Aurore : En test comme Eric Mathieu
27 July 2010 at 15h39 2

administrator published a new article je regarde le ticket 197 !!
26 March 2010 at 15h42

administrator published a new article je regarde le ticket 197 !!
26 March 2010 at 15h42

Alerts 3

Aurore is following you

Eric 13 is following you

Eric 13 is following you

Eric 13 is following you

Eric 13 is following you

Gloob is following you

Eric has commented your article "test eric Public"

Zone 1: Your profile, where you can also inform others in your network about your work

Zone 2: latest information shared by people in your network

Zone 3: portal alerts

Other zones can also appear on this page

Customisable portal

The customisable portal is presented as a collection of pages, accessed via tabs.

The screenshot shows a web portal interface with several key components:

- Navigation Bar:** Includes links for 'Accueil', 'ajouter des widgets', 'Mon carnet', 'Mon réseau', 'Mes groupes', and 'Menu'. A search bar is located on the right.
- Browser Tabs:** Shows tabs for 'portaneo.com', 'Mes outils', 'Gestion commerciale (5)', 'Entreprise 2.0', and 'Google'. A '+ Nouvelle page' link is also present.
- Widgets:**
 - RECHERCHE FOURNISSEURS:** A search widget with a magnifying glass icon and a search bar containing the word 'rechercher'.
 - MARKET SHARE:** A widget showing a donut chart for 'North America', 'Europe', and 'Asia Pacific'. It includes data for 'Evolution : +2%', 'Market Share 2007 15%', and 'Market Share 2006 13%'.
 - STOCKS:** A table listing stock prices and changes for Apple, Google, Intel, Microsoft, and Exxon Mobil.
 - EVOLUTION CHIFFRE D'AFFAIRE:** A horizontal bar chart showing the number of accounts for different revenue ranges: 100M - 250M, 10M - 50M, 250M - 500M, and 500M - 1B.
 - MES CONTACTS COMMERCIAUX:** A list of contacts including 'Robert, Jean' and 'Vassoud, Laure'.
- LINKEDIN:** A sidebar widget with a search bar, a dropdown menu set to 'By Keywords', and a list of navigation links: Search, Updates, Contacts, Profile, Invite, Settings, Feedback, and Sign Out.

To change to another page, simply click the tab title (Zone 1) of the page you want to see.

To add a new page, click the "+ new page" link (Zone 2 / optional link).

Each page consists of a collection of panes (called Widgets: Zone 3) providing summaries of and ways to access different kinds of information. Each widget can be modified, moved or removed (with the exception of fixed widgets).

To add widgets, open the menu (Zone 4) then choose the widgets you need from the library.

Social network

Home » Communities » People I am following

Communities

Search for people

Network Groups

People I am following | News | Recommendations | They follow me | Users directory

administrator

Open the notebook | Unfollow | Invite in a group

Aurore : En test comme Eric Mathieu -24 day(s) ago


Contact by email | Open the notebook | Unfollow | Invite in a group

The social network feature allows you to manage and pursue your networking, either based on contacts you already have in the organisation, or with people that Portaneo helps you find through what they have published in their notebooks.

Once in your network, you can keep track of all their public activity on Portaneo, as soon as it happens.

Notebooks

Notebooks are collaborative areas for individuals or groups, where information can be published for colleagues or the whole organisation, with context added using descriptions and tags.

The information can be sent from customised pages using the  icon, or written directly into the notebook using the "write an article" link.

Any information published in a notebook can be made accessible just to the person who published it, or to anyone in their network, or to the whole organisation (public articles).


As comments are added by those working around you, this business intelligence then increases in value, and contributes to overall knowledge in the organisation. This approach allows each individual's intelligence to be used directly by others, and integrated into their Portaneo portals.

Each notebook can be turned into a widget.

Menu

Eric Mathieu
 Modify my profile
 View my notebook
 Users directory

Widgets

Search by tags 

Widgets library ▼
 Add RSS feed ▼
 My widgets ▼

Communities


My network ▼
 My groups ▼

Notebooks

My notebook ▼

Archives

Options

All Portaneo functions are available via the Portaneo menu, which you can access at any time by clicking the "menu" link at the top-right corner of the page: .

Menu tabs provide access to the various Portaneo functions:

- Widgets : Allows widgets to be added to pages
- Options : Allows customisable portal pages to be configured
- Archive : Provides access to articles that you have archived
- Notebook / communities : Provides access to further applications (optional)

Some options may not be available, depending on the page from which you opened the menu. Configuration functions, for instance, are only

available when you opened the menu from one of your tabs.


Getting started

Log in to Portaneo

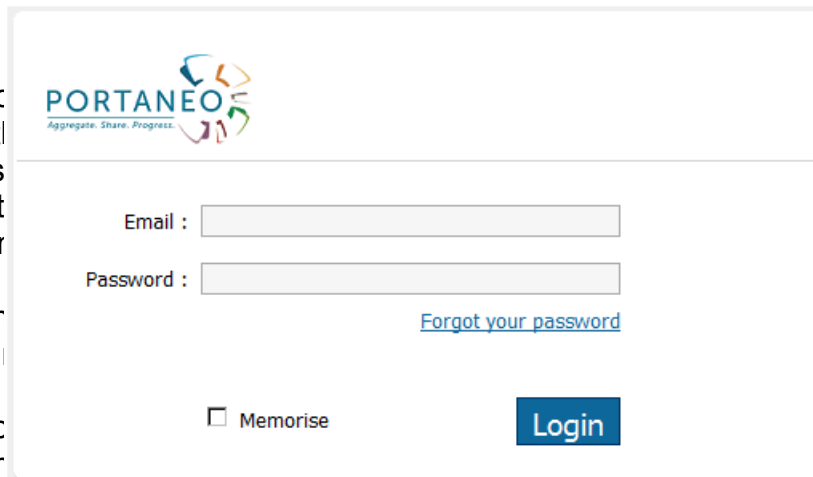
Portaneo is a web application. This means you access it using your web browser (Internet Explorer 6, 7 or 8, or Firefox)

To log in to yo

- Click th
- Enter t
- your er

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the instructio



The screenshot shows the Portaneo login interface. At the top left is the Portaneo logo with the tagline "Aggregate. Share. Progress." Below the logo are two input fields: "Email :" and "Password :". To the right of the password field is a blue link that says "Forgot your password". At the bottom left is a checkbox labeled "Memorise". At the bottom right is a blue button labeled "Login".

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er the details

ink and follow

For further details about logging in to Portaneo, you can read the "Logging in to Portaneo" chapter in the User Guide, including:

- *enable automatic login*
- *change your password*
- *set Portaneo as my home page*

Configure your first Portaneo page

On logging in, you will see your customisable Portaneo portal.

Try following these steps to configure your first portal page:

Step 1: Look at the tabs available by default.

Click the titles of the various tabs in your Portaneo.

Pages can be:

- customisable pages, showing widgets that you can move, configure or remove,
- web pages, from your intranet or the internet.

The User Guide will provide details of the customising options available.

Step 2: Create a new customisable page

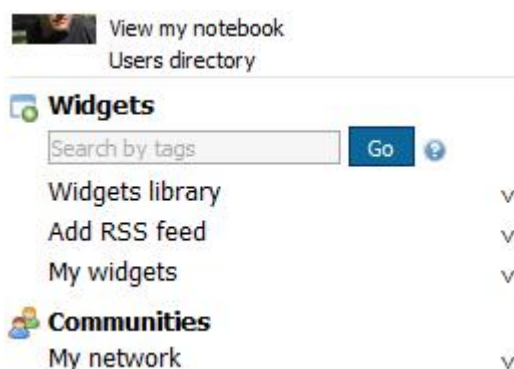
Click the "+ new page" link, on the right within the tab bar. In the popup window that appears, click the "New empty page" link.

Enter a title for the tab in the text box provided, and click the green button shown in the tab to confirm (or press the 'enter' key).

Note: the "+ new page" link may be disabled on your Portaneo installation

Step 3: Add content to your new page

If the menu on the left is not already open, click the "add widgets" link at the top-left corner of the page.



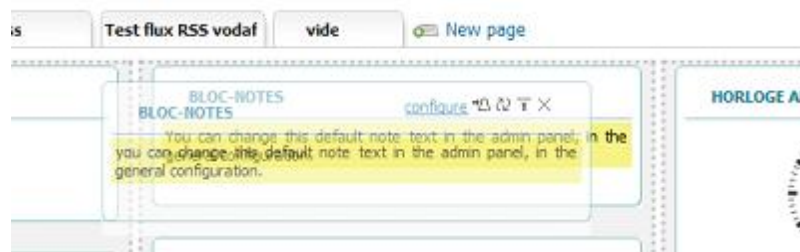
Within the "Widget library", click the 📁 icons to navigate within the library. When you find a widget that interests you, click its title.



A preview of the widget is shown. If you like the widget, add it to the page by clicking the "Add this widget to my page" link

Continue adding widgets until the page contains as many as you need.

You can move a widget by placing the mouse pointer over its title bar, then holding down the left mouse button while moving the mouse pointer to 'drag' the widget to a new position, then releasing the mouse button.



Note: all your changes are automatically saved. You do not have to click any buttons to save a widget you have added. When you next log in, you will find the page looking just as you left it when you closed it.

Note: If you have added a widget by mistake, you can remove it by clicking the cross that appears when you hover the mouse pointer over its title bar.

For further details and to find out about all the customising options, read the [Configure Your Pages](#) chapter of the User Guide, including:

rename a page, colours, creating another page, adding my favourite RSS feed, etc.

Set up your social network

The following steps show you how to start using Portaneo for networking

Step 1: Complete your profile

Click your name, found in the upper-right corner of the page. A page will be displayed showing your photo, name, description and other information:

- Photo: a photo of you which is attached to all information you share on Portaneo
- Tags: a collection of keywords relating to you. These key words allow others in your organisation to find you easily. Enter at least a dozen keywords to make your profile most effective.
- Description: introduces you and describes your work. This enables people who find you via information you share to learn more about you.

Step 2: Add people you work with to your network

Start by adding people you know using the search engine shown on the right of the screen, by typing their email address, name, or a tag (keyword) that relates to them:

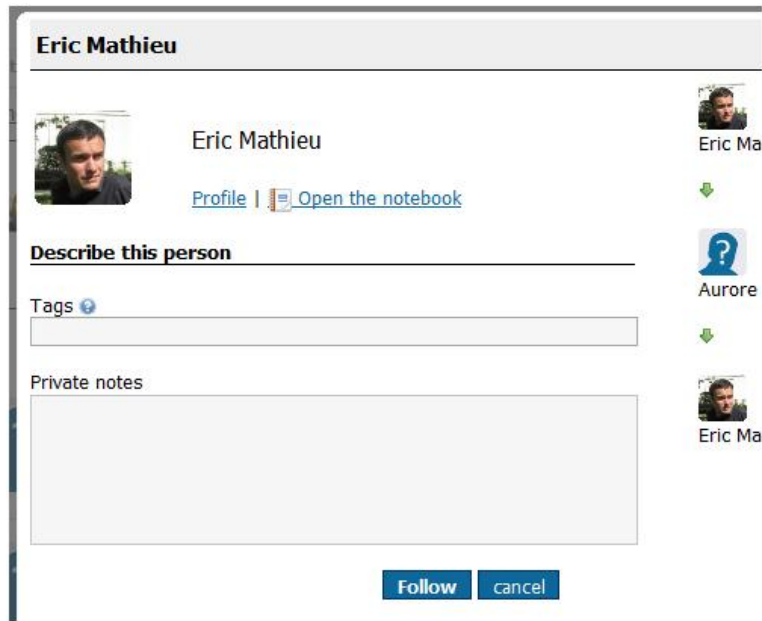
The screenshot shows the 'People I am following' page in Portaneo. At the top, there is a breadcrumb trail: Home » Communities » People I am following. Below this is a header section with a 'Communities' title and a search bar on the right that says 'Search for people' with a placeholder 'Type mail address, name or tag' and an 'ok' button. Underneath the header, there are tabs for 'Network' and 'Groups', with 'Network' selected. Below the tabs, there are navigation links: 'People I am following', 'News', 'Recommendations', 'They follow me', and 'Users directory'. The main content area displays a list of users. The first user is 'administrator' with a profile picture of a question mark icon. Below the name are three action buttons: 'Open the notebook', 'Unfollow', and 'Invite in a group'. The second user is 'Aurore' with a profile picture of a question mark icon. Below the name is a status update: 'En test comme Eric Mathieu -24 day(s) ago'. Below the status are four action buttons: 'Contact by email', 'Open the notebook', 'Unfollow', and 'Invite in a group'.

If several people match the details you enter, select the one you were looking for

Then add information that describes your colleague, so you can find them more easily or recall why you added them to your network:

- Tags: keywords describing the person.
- Description: description and context about how you came across the person. For example, you could describe how the person could assist you and in what circumstances.

Then click "follow" or "add" to save the details.



The screenshot shows a user profile form for "Eric Mathieu". At the top, the name "Eric Mathieu" is displayed in a grey header. Below this, there is a profile picture of a man, the name "Eric Mathieu", and two links: "Profile" and "Open the notebook". To the right of the profile picture, there are three smaller profile pictures: "Eric Ma", "Aurore", and "Eric Ma", each with a green downward arrow below it. Below the profile picture, there is a section titled "Describe this person" with a horizontal line underneath. Underneath this section, there are two input fields: "Tags" with a plus icon and "Private notes". At the bottom of the form, there are two buttons: "Follow" and "cancel".

Step 3: find new people close to you

Click the "Recommendations" option in the "Communities" menu.

The recommendations feature allows you to locate people who may have a reason for being in your network. The following criteria are used:


- Shared links: If several people in your network are all linked to a given person, you may also know that person
- Shared tags: Portaneo identifies people who have things in common with you by comparing tags

Mon réseau

Ajouter une personne à mon réseau Tapez email, nom ou mo

Mon compte **Mon réseau** Mes groupes Discussion

Recommandations

 **Philippe de Visme**

Contact par email | Voir son carnet Portaneo **2 relations communes** | ajouter/Modifier

Mon réseau

Mon réseau
Activité de mon réseau

Ajouter une personne à mon réseau

Recommandations
personne(s) vous ont mises dan

When these three steps are complete, you will have established an initial network of contacts. As you continue to use Portaneo, new people will be added to your network and others removed from it, until eventually it accurately reflects your networking connections, and will allow you to find new, useful contacts for your work.

The User Guide found later in this document provides further details on these and other functions relating to the social network feature, including:

- *keep track of a notebook in my portal,*
- *read the most-read or most-commented articles,*

Share information using your notebook

Information, widgets, pages, etc. can easily be shared with other Portaneo users.

A special  icon appears in various places within the portal:



When you click the icon, a popup window is displayed that allows you to specify sharing details:


- Share via email:
 - o Select the people you want to share this item with. The list displayed shows the people in your Portaneo social network. You can also provide email addresses for people who are not in your network or do not use Portaneo. The people you have selected appear in the "People selected" box
 - o Click "Share this article" to send an email to the people selected. The email will contain a link for navigating to the shared information.
- Share via Portaneo notebook publication
 - o Enter a title for the article that will be created (the default title used is the title of the item shared: article title, widget title, page title, etc.)
 - o Enter tags that allow other users to find the information easily with the search engine (if you are creating a public article).
 - o Enter a description to provide some context for the article. Someone coming across your notebook may not understand why you have shared the article, or may not understand the article itself. This description gives you an opportunity to help them understand.
 - o Access:
 - Public: the article published is accessible to all users
 - Members: the article published is accessible only to members of my network (or in the case of a group notebook, to the members of the group)
 - Private: the article is only visible to you.Access can be changed at a later date.
 - o Groups (if you are a member of any groups): check the boxes for the groups you also want this article to appear in (as well as your personal notebook)
 - o Click the "Share" button to send the article to your notebook and any

other notebooks selected.

Note: To publish a draft, first publish the article with 'private' access. When finished, share it with 'public' access directly from the article's editing page in your notebook.

Sharing to a notebook creates an entry:


[Home](#) » [My notebook](#) » Publications




My notebook


[Profile](#) **Publications** [Contributions](#) [Public widgets](#) [Write an article](#)


[Refresh](#) | [Add this notebook to my portal](#) | [Follow the comments](#) |




[Thaïlande : l'armée recule face à 80 000 manifestants](#) 

test9Thaïlande : l'armée recule face à 80 000 manifestants
Eric Mathieu • 28 March 2010 • 0 Trackback(s) • 0 comment(s) • [Modify](#) • [Options](#) ▼



[test eric Public](#) 

test eric public cool !
Eric Mathieu • 26 March 2010 at 18h11 • 0 Trackback(s) • 1 comment(s) • [Modify](#) • [Options](#) ▼



By [Eric Mathieu](#), 26 March 2010 at 18h11 | [Remove](#)

Venez voir !

User Guide

Logging in to Portaneo

As soon as you receive an email with a link to Portaneo and your login details, you can start to use Portaneo. Go to the URL provided

Set Portaneo as my home page


When the Portaneo login page is displayed:

With Internet Explorer:

From the menu, select "Tools", then "Options". Under the "General" tab, click the "Use current" button.

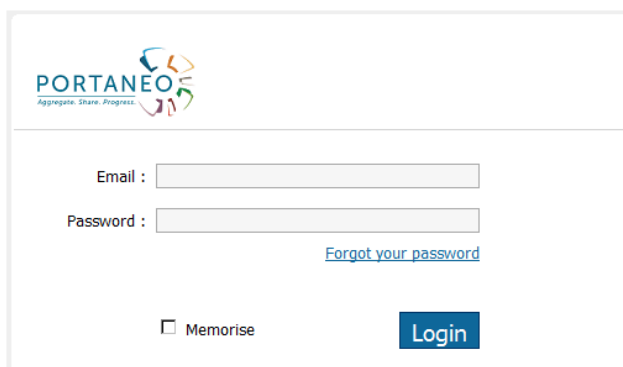
With Firefox:

From the menu, select "Tools", then "Options". Under the "General" tab, click the "Use Current Page" button.

 **Tip:** You can also automatically set Portaneo as your home page, once you have logged in. To do this, from the Portaneo menu, select "Options", then check the "Set as home page" box. Confirm your action in the popup window that appears.

Enable automatic login

If you would like to log in automatically on the computer you are currently using (so you no longer need to enter your user ID and password), check the "Memorise" box in the login window.



The screenshot shows the Portaneo login interface. At the top left is the Portaneo logo, which consists of the word "PORTANEO" in blue capital letters above the tagline "Aggregate. Share. Progress." in a smaller font. To the right of the text is a circular icon made of colorful arrows. Below the logo are two input fields: "Email :" followed by a text box, and "Password :" followed by a text box. To the right of the password field is a blue link that says "Forgot your password". At the bottom left is a checkbox labeled "Memorise". At the bottom right is a blue button with the word "Login" in white text.

However, you will still need your password in some cases, so take care not to forget

it. You will need to enter it if you access your portal from another workstation, for example, or if you choose to double-secure certain pages.

If you lose your password, however, you can get a new one sent to the email address in your user ID by clicking the "forgot your password" link on the login screen.

Change your password

Change my password

Current password	<input type="text"/>
New password	<input type="text"/>
New password confirmation	<input type="text"/>
	<input type="button" value="Modify"/>

Is the password you received by email difficult to remember? If so, you can change it.

First open your profile by clicking your name at the top of the page.

To the left of the screen is an area for changing your password, where you fill in the fields shown.

Click "Modify" to confirm your new password. This saves the new

password, which can be resent to you if you forget it.

Request a new password

If you have forgotten your password, you can get a new one sent to the email address in your user ID by clicking the "forgot your password" link on the login screen.

Log in as another user

To log in using a different account, click your name and enter the account credentials in the "Switch to another user" area

Log out

To log out from your Portaneo portal, click the "Logout" link in the horizontal menu, at the top-right corner of the screen.

Note: To close Portaneo, just close your browser. The logout button will clear any automatic login you have enabled.

Managing your profile

View your profile

To see your profile, click your name at the top of the page.

Your profile consists of:

- a photo
- a description (your work, location, main interests, etc.)
- tags (keywords applicable to you that allow others to find your profile quickly)
- other information as decided by your organisation

Change your profile

To change your profile information, click one of the "Modify" links opposite each item:

- add/change your photo

Click the "Browse" button to locate the photo on your computer that you want to use. It must be in jpeg format and no larger than 1 megabyte

- specify the keywords (tags) applicable to you.

If you enter several keywords, then unlike normal punctuation there must be no space after the comma that separates them. These keywords are used as data by the various search engines and will allow other users to find your profile easily

- add/change your profile description on this screen

This description can be used to introduce yourself to people who come across your profile, or as a curriculum vitae. It is an area solely for your use, which you can use freely without any length restriction

To confirm details you entered or changes you made on this screen, click the "Update" button

Managing your pages

Initially, a default set of tabs is configured for you, set by the group you are in.



Each page of your Portaneo portal has its own tab.

View the content of your pages

To view a page, click the title of its tab. The page begins to be displayed, and may take a few seconds to display in full.

Add a page

To add a page, click the "+ new page" link shown to the right of the existing tabs. A window opens where you can take one of the following actions:

- create a new page that will allow you to add widgets

When you add this kind of page, a new tab opens, prompting you to change its title. Having set a title, you can add content (see the chapter on widgets).

- create a page based on other users' portals

Enter some keywords using the search engine shown. Pages created and shared by other users will be listed, relating to those keywords.

Click the page that interests you to add it to your portal.

- open an intranet or internet page in one of your tabs

Type the web page address in the text box shown and click "OK"

- create a page based on a pre-defined page

Click the page that you want to add to your portal.

Change tab order

Hover the mouse pointer over the tab you want to move until the pointer becomes a cross. Hold down the left mouse button while moving the mouse to 'drag' the tab to a new position. When the tab is in the right position, release the left mouse button.

Remove a page

To remove a page, first click the corresponding tab to view the page, then click the down-arrow symbol just to the right of the tab title. Click the "Delete this page" option. Click "OK" to confirm page removal.

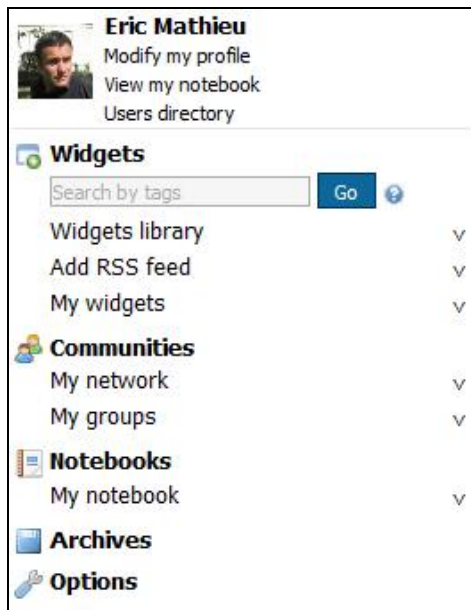
Note: the Portaneo portals administrator in your organisation may have 'locked' certain widgets.

Managing your page content

Add a widget from the library

To add a widget to your page, click either

- the "Add widgets" link at the top-left corner of your portal
- the "Add widgets" link available in the shortcut menu found in the tab for the page.



Navigate through the library by clicking the "folders" to see what the various categories contain.

There are two ways of adding a widget to your page:

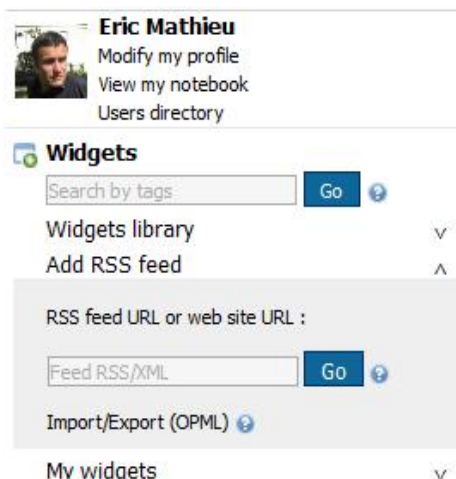
- You can click the title of the widget, then click the "Add this widget" button in the popup window that appears.
- Alternatively, you can "drag and drop" the widget onto your page (click and hold left mouse button while moving mouse)

Note:

You can use the widget search engine to find a widget more quickly. Enter keywords relating to the widget you are looking for.

Add a widget from an RSS feed

Here, the [lemonde.fr](http://www.lemonde.fr) web site will be used as an example. Go to <http://www.lemonde.fr> and click the "RSS" link that you will see at the foot of the home page. When the page showing the list of RSS feeds appears, copy the address of the RSS feed you want to use by right-clicking an RSS icon and selecting "Copy Shortcut" (Internet Explorer) or "Copy Link Location" (Firefox). This copies the RSS feed address to the clipboard.



To add the feed in Portaneo, click the "Add widgets" link to open the widget management menu.

Next, click "Add RSS feed". Then paste in the RSS feed address that you copied, by right-clicking the text box and selecting "Paste". Finally, click "Go".

Tip: You can also type "lemonde.fr" into the text box. Portaneo will list the various RSS feeds available from that site (not all internet sites are configured to support this functionality)

Note: You can also add feeds set up on a Netvibes page or other portal, by exporting the feed list in

OPML format (see instructions on the site from which you are exporting), then importing the list into Portaneo by clicking "Import/Export (OPML)"

Remove a widget



To remove a widget, click the cross on the right of its title bar.

Some widgets are mandatory and cannot be removed. If the title bar is hidden, display it (see "Display/Hide title bars").

Move a widget



You can move a widget by clicking its title bar, then dragging it to the position where you want it, on the same page or a different page. When the widget is in the desired position, release the mouse button.

If you want to move the widget to a different page, drag it over the tab for the page where you want to put it. If the widget can be placed on that page, a red border line

will appear around the tab.

Note: The dragging bar on widgets may be hidden. If so, the widgets cannot be moved.

Configure your widgets

You can configure widgets by changing their content or settings. Click the "Configure" link in the widget title bar.

Your administrator may have locked items you can change, to prevent them being configured, but if not, they will now be shown.

Change the title

Click "Configure", enter the new title, then click "OK".

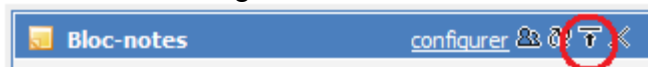
Change the colour of the widget title bar

Click "Configure", pick a colour, confirm the change, and the new colour will be shown on the title bar.

Other configuration settings may also be shown

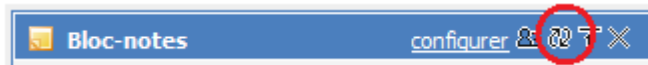
Minimise a widget

Click the "minimise" icon on the widget title bar.



Refresh a widget

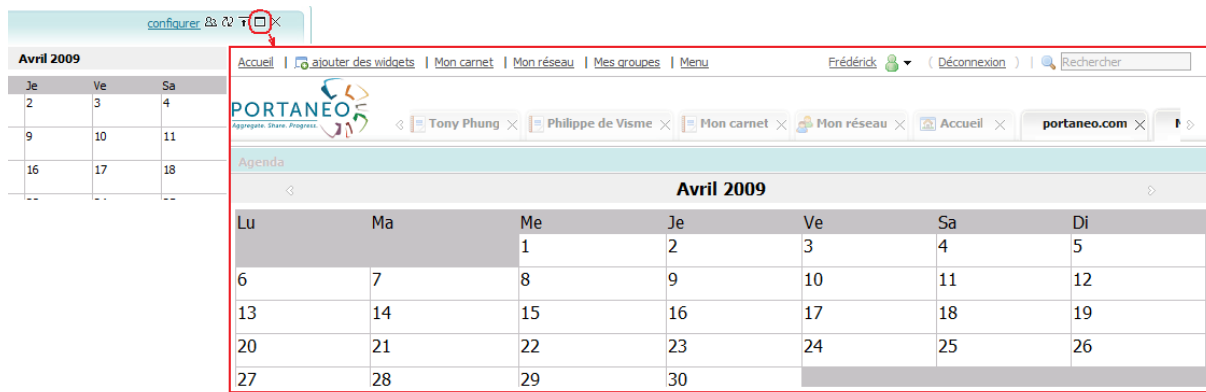
Click the "refresh" icon shown below




Even if you do not use them, RSS feeds normally update automatically around every 15 minutes.

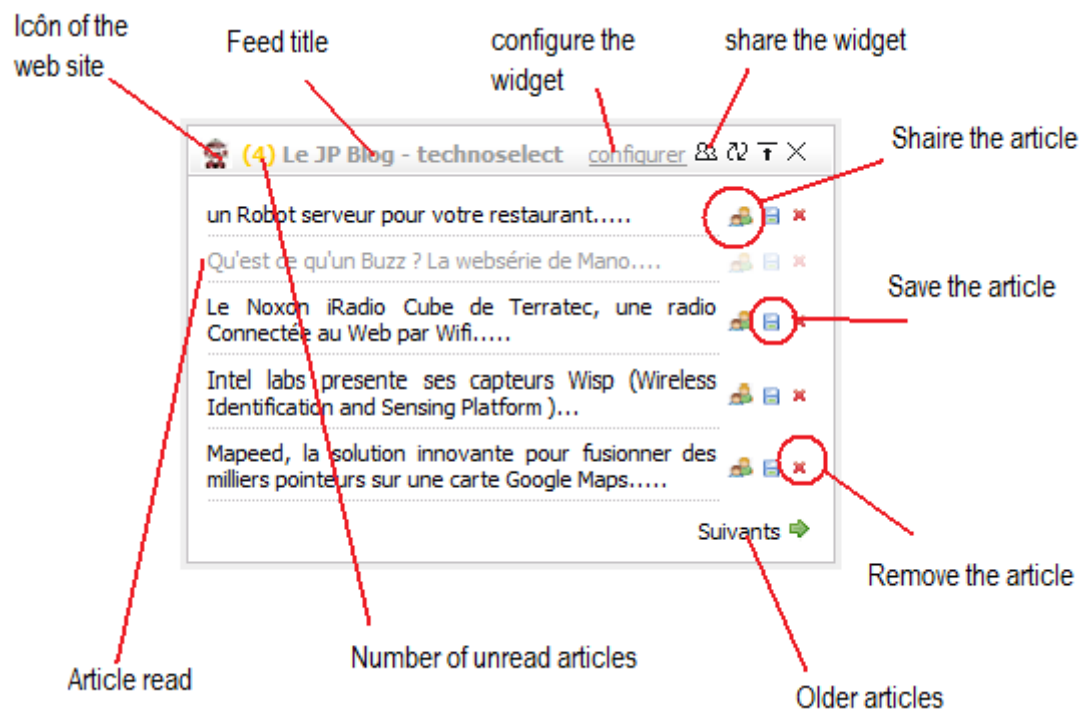
Switch a widget to full-screen mode

Some widgets have a full-screen view mode. To switch to that mode, click the link shown below:



To return the widget to normal view mode, click the  link for the widget in full-screen mode.

Information widgets (RSS feeds)



Change number of articles shown

Click "Configure" in the widget title bar, then select the "Number of articles" desired and click the "OK" button. The article list refreshes and displays the number of articles requested.

Scroll through articles

If there are more articles available from the feed than those shown, page scroll buttons are displayed at the bottom of the widget. The "previous" button will retrieve

newer articles, and the "next" button will retrieve older articles.

Set all articles as read

Once an article has been read, it is displayed differently (usually in grey). This helps you keep track of which articles you have read.

To set all articles to 'read', click the unread article total (the number in brackets next to the widget title).


Save an article

You can save an article for reading later, or to archive it so as to be able to find it easily.

Click the  diskette icon to the right of the article you want to save.

To return to articles you have saved, use the Portaneo menu and click the "archive" tab, indicated by a diskette.

Share an article

You can easily share an article with people in your network, or with all users. Click the  share icon to the right of the article you want to share.

For more details, see the "Share and collaborate with Portaneo" chapter.

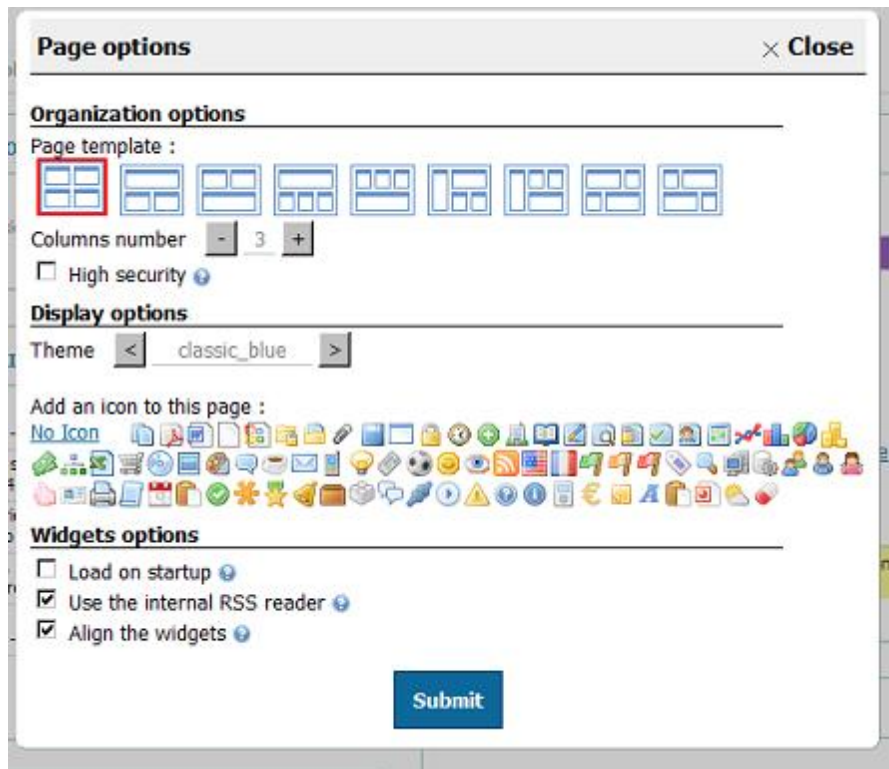
Remove an article

You can remove an article from the list displayed by clicking the red cross to the right of the article.

Configure your pages

Several options are available that allow you to customise the way pages on your portal are displayed. These options can be accessed in two ways:

- from the "Configuration" section of the menu
- from the menu opened by clicking the arrow to the right of the title of the active tab



Change the number of columns on the page:

You can set the number of columns you want on the page by clicking the "+" button to add a column or the "-" option to remove a column. Click "OK" to save your changes.

If you add a column, you can add widgets to that column.

Before removing a column, ensure it is empty by removing (or moving elsewhere) any widgets it contains

Enable/Disable the in-place RSS reader

The internal RSS reader enables you to read all articles on your page directly within the Portaneo interface.

If you disable this option (by clearing the "use the internal RSS reader" check box), articles will be opened using a new page

Note:

The in-place RSS reader may be disabled by your administrator. If so, the option to read articles within Portaneo will not be available.

Change the theme of a page:

You can scroll through the available styles by clicking the < and > buttons, then choose the most suitable one.

Note:

This is only possible if more than one theme is available


Add an icon to a tab

You can customise the tabs for your pages by adding icons to them. Display the page configuration options and click the icon you want to use. Click "OK" to confirm the change.

The icon will then be displayed on the tab of the active page.

Rename a page

To rename a tab, click the tab title of the active page. The title will change to a text box allowing you to enter a new name for the page.

To change the page name, enter the name you want to use for the page and click the green  button to confirm.

The red  button will cancel changes and revert to the original tab title.

Display/Hide title bars

The title bar of a widget contains controls that allow you to refresh, minimise or remove it, as well as change its configuration settings (see managing widgets).

You can choose to display or hide the title bars of widgets on the active page, using the "Show title bars" check box in the options menu.

Hiding title bars avoids accidental changes, as well as saving space on the page. However, if title bars are hidden, it is not possible to change widget configuration settings.

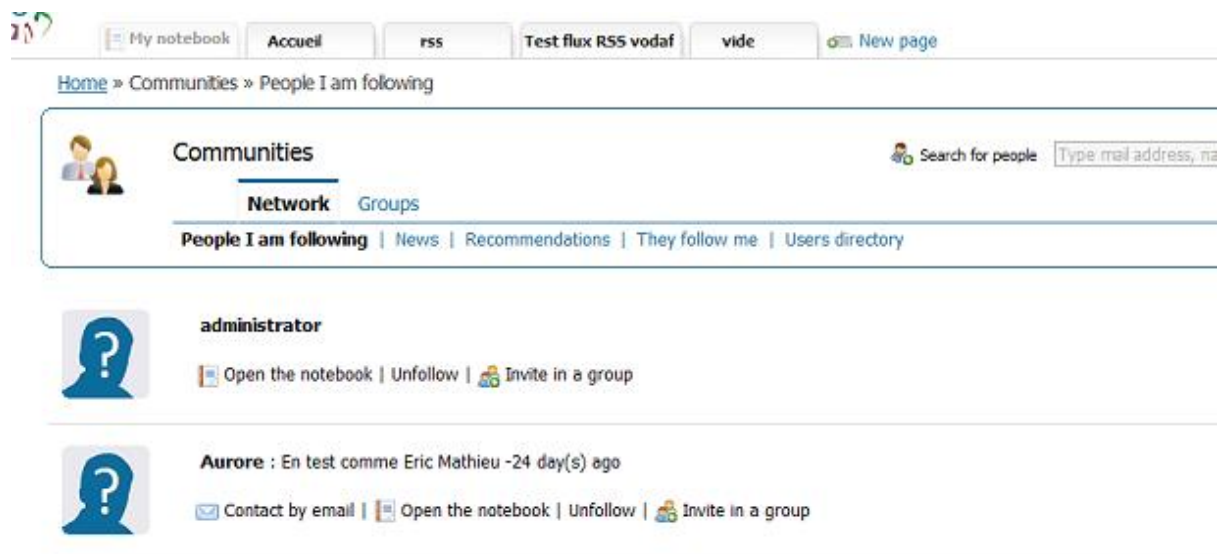
Double-secure a page

If you double the security of a page, then if the page is displayed for 30 minutes, it is hidden by a different screen, where you will need to re-enter your password to return to the page. This option only applies to the current page.

Managing your social network

To manage your network, click the "My network" link at the top of the page.
A list of people in your network is shown

List of people in your network



The following options are available for each person shown:

- Contact by email: send an email to that person
- open the notebook: display the person's Portaneo notebook
- Remove from my network or unfollow: remove the person from the list
- Invite in a group: to send the person an invitation to join one of your groups

Add members to your network

There are several ways to add people to your network:

- Use the search engine provided
- Select people from the directory of all users
- Open a user's notebook and use the "Add to my network" or "follow" link
- Display users recommended by Portaneo, using the "Recommendations" link from the menu on the right.

Using the search engine:

In the top-right frame, a 'people' search engine is available that allows you to search for Portaneo users based on their name, email address or tags (keywords).

The screenshot shows the 'Communities' section of a web application. At the top, there is a search bar with the text 'Search for people' and a placeholder 'Type mail address, name or tag', followed by an 'ok' button. Below the search bar, there are tabs for 'Network' and 'Groups'. Under 'Network', there are links for 'People I am following', 'News', 'Recommendations', 'They follow me', and 'Users directory'. The main content area displays two user entries. The first entry is for 'administrator' with a profile picture of a question mark icon and options to 'Open the notebook', 'Unfollow', and 'Invite in a group'. The second entry is for 'Aurore' with a profile picture of a question mark icon, a status update 'En test comme Eric Mathieu +24 day(s) ago', and the same interaction options.

When you enter one of these criteria, Portaneo displays a list of matching users. If only one person matches, their contact entry is shown. If several people match the details entered, a list is shown. You can then click on the person you were looking for.

The screenshot shows the profile page for 'Eric Mathieu'. The profile picture is a photo of a man. To the right of the name, there are two smaller profile pictures: one for 'Eric Ma' and one for 'Aurore', each with a green downward arrow below it. Below the name, there are links for 'Profile' and 'Open the notebook'. The page has sections for 'Describe this person', 'Tags' (with a plus icon), and 'Private notes'. At the bottom, there are 'Follow' and 'cancel' buttons.

Enter tags (keywords) relating to that person, and a description (how you came across them, what they do, other useful information). The information you enter is private and not visible to other users. Finally, click "Add" (or "Modify" if the person is already in your network).

Note:

You can also add people from the directory of all users. To see the directory, click the "Users directory" link in the menu on the right.

Find out whose networks you are in

To see a list of people who have added you to their networks, click the "They follow me" link in the menu on the right. A list of contact entries will be displayed. You can also add any of the people shown

to your own network.

Contacts recommended by Portaneo

Portaneo can show you a list of people who have things in common with you:

- shared links (at least two people in your network know a given other person)
- shared tags (you have at least two profile tags in common with the other person)

To see the list, click the "Recommendations" link in the menu on the right.

News about people in your network

To see public information about the people in your network, click on the logo :

Discussions People I am following | [Groups](#) | [Top News](#) | [All](#)

 [Aurore](#) : En test comme Eric Mathieu
27 July 2010 at 15h39

 [administrator](#) published a new article [je regarde le ticket 197 !!](#)
26 March 2010 at 15h42

 [administrator](#) published a new article [je regarde le ticket 197 !!](#)
26 March 2010 at 15h42

Public information consists of:

- Information that has been shared publicly
- Articles published with public access
- Widgets that have been shared publicly
- Pages that have been shared publicly
- Updates sent from a mobile
- Comments added to a public article

Note: A "My groups" link allows you to display news about your groups.

Communicate with members of your network

You can "chat" (exchange typed messages that are sent immediately) with people in your network, if they have Portaneo open on their computer.

To start, click the "Chat" link on your network screen.

Managing groups

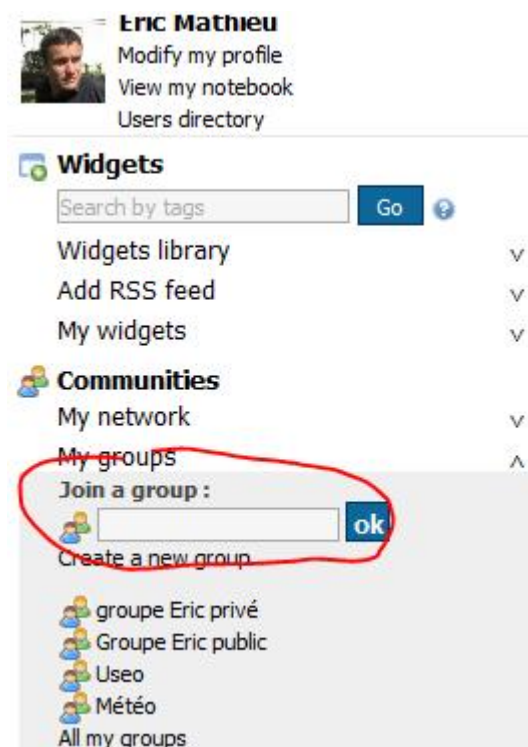
Portaneo enables you to create groups for sharing information relating to a given topic, event (conference, meeting, etc.) or team.

To manage your groups, click the "My groups" link found in the upper part of the portal.

Join a group

There are three main ways of joining a group:

- If you have opened the group's notebook, click the "Join this group" link to the right of the group title
- If you have opened a person's notebook, you can display their groups by clicking the "Groups" link, then join a group by clicking the "Join this group" link
- You can also search for a group with a given name, from the group management screen



The screenshot shows the user interface for Eric Mathieu. At the top, there is a profile picture and name, with links for 'Modify my profile', 'View my notebook', and 'Users directory'. Below this is a 'Widgets' section with a search bar and a 'Go' button. Underneath are links for 'Widgets library', 'Add RSS feed', and 'My widgets'. The 'Communities' section includes 'My network', 'My groups', and a 'Join a group' section. The 'Join a group' section is circled in red and contains a search input field, an 'ok' button, and a list of groups: 'groupe Eric privé', 'Groupe Eric public', 'Useo', and 'Météo'. There is also a link for 'Create a new group' and 'All my groups' at the bottom.

To search for a group, enter all or part of its title.

If more than one group matches what you entered, a list of groups is displayed, where you can select the group you were looking for.

- ∨
- ∨ If only one group matches, it will automatically be added to your group list.
- ∨

- ∨ **Note:** this search engine can only be used to find public groups. To join a **private group**, you have to be invited by one of its members.
- ∧

Create a group

To create a group, fill in the fields shown on the right of the screen under "Add a group".

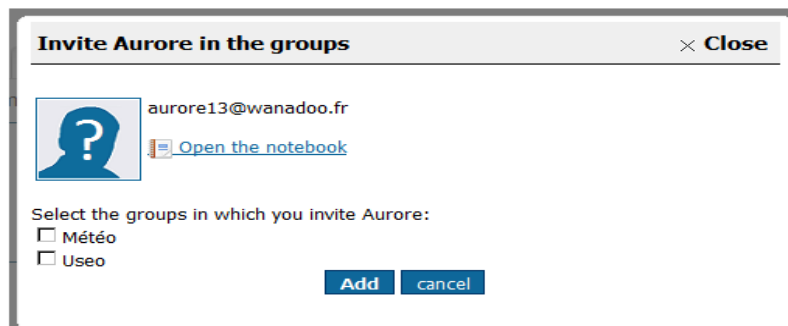
Enter a title and description for the group, and click the "Add" button. Your group will be created and displayed in the list on the left.

If you want to create a private group (its information will only be visible to members, and it can be joined only by invitation), check the "Private group" box before confirming creation of the group.

Once the group has been created, you can invite users to join it.

Invite users to join a group

To invite users to join a group, display the list of users in your network, and click "Invite in a group". Select the group or groups that you want to invite that person to join.

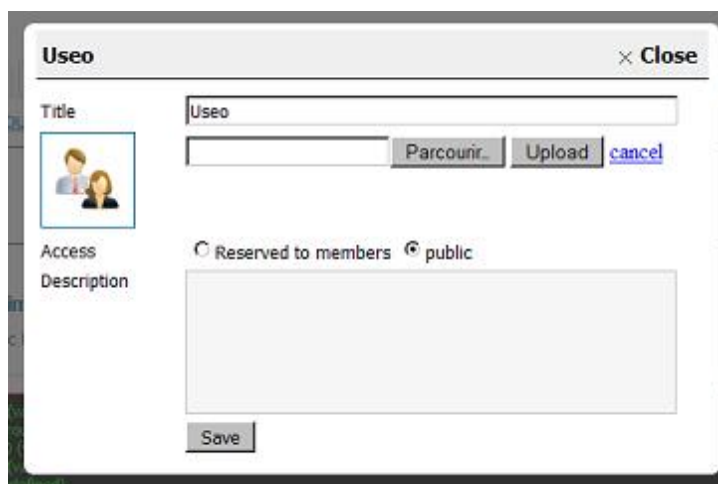


The person will not appear in the group until they confirm their membership of it.

Note: A user can decline the invitation. If they decline, they will not appear in the list of members shown in the group notebook.

Change a group


To change the title, description, access type or picture used for a group, open the group's notebook (using the "Group notebook" link in the group list) and click the "modify" link to the right of the group title.



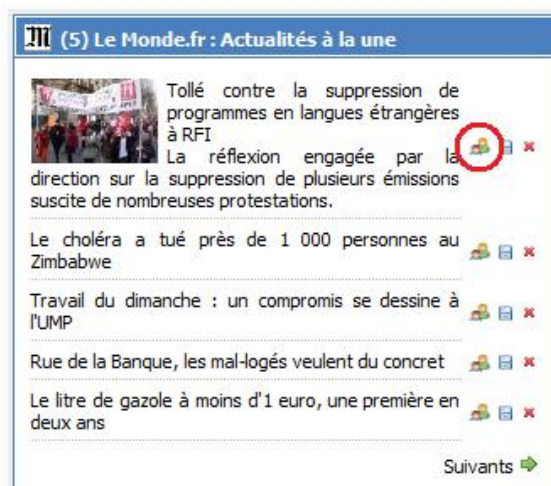
The screenshot shows a dialog box titled "Useo" with a "Close" button in the top right corner. On the left side, there are labels for "Title", "Access", and "Description". The "Title" field contains the text "Useo". Below the title field is a small square icon placeholder with a "Parcourir..." button and an "Upload" button. The "Access" section has two radio buttons: "Reserved to members" (which is unselected) and "public" (which is selected). The "Description" section is a large empty text area. At the bottom of the dialog is a "Save" button.

Share and collaborate with Portaneo

Share information contained in a widget

Some of your widgets will display a  symbol. You can click it to share information it relates to with other Portaneo users.

Here is an example using an information (RSS) widget:

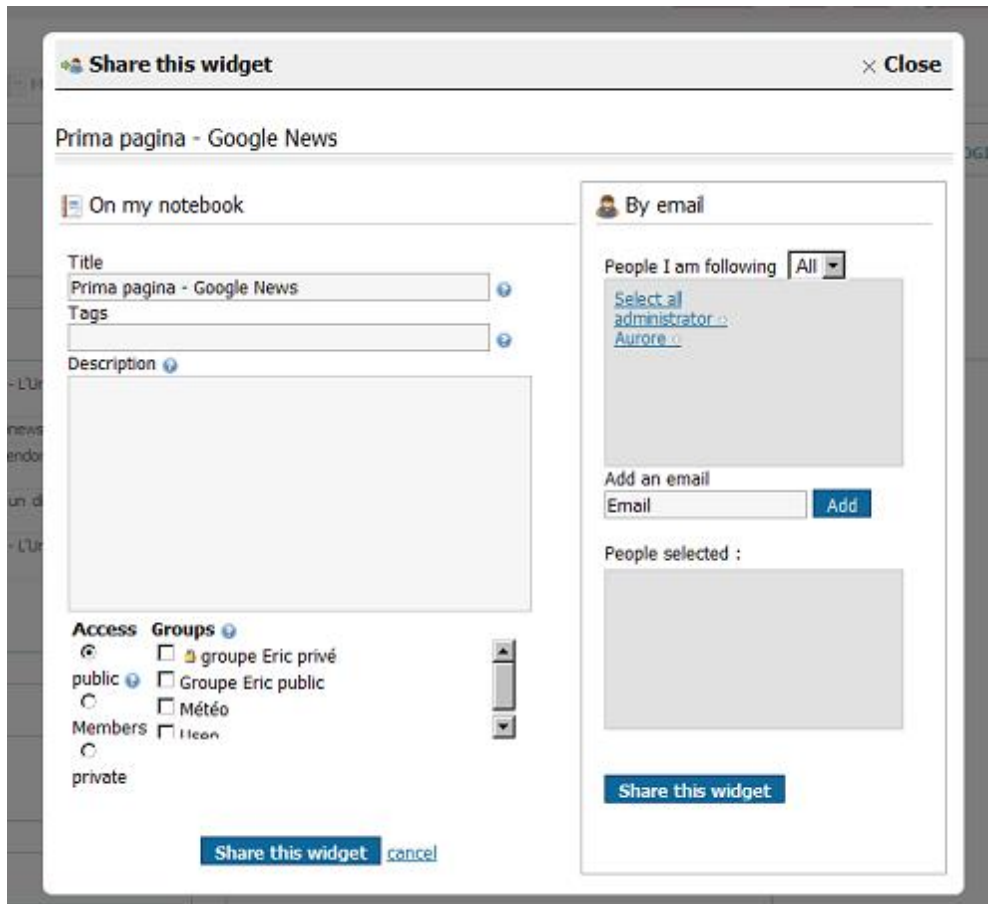


The screenshot shows an RSS widget titled "(5) Le Monde.fr : Actualités à la une". It contains a list of news items, each with a small thumbnail image and a share icon (a person with a plus sign) circled in red. The items are:

- Tollé contre la suppression de programmes en langues étrangères à RFI. La réflexion engagée par la direction sur la suppression de plusieurs émissions suscite de nombreuses protestations.
- Le choléra a tué près de 1 000 personnes au Zimbabwe
- Travail du dimanche : un compromis se dessine à l'UMP
- Rue de la Banque, les mal-logés veulent du concret
- Le litre de gazole à moins d'1 euro, une première en deux ans

At the bottom right of the widget is a "Suivants" button with a right-pointing arrow.

If you click the image shown, the sharing screen is displayed:



You can share the information in two ways:

- Share information via an email to a person in your network:

You can use the sharing screen to select contacts you want to share the article with. You can also enter email addresses for people who aren't in your network, whether they use Portaneo or not. Click "Share this article" to confirm sharing of the information. An information message will be displayed to confirm that an email has been sent.

The email sent to the selected people gives them access to the shared item.

- Share information by publishing the article to your notebook or a group notebook

Enter a title (or the article title will be used by default), tags (or keywords, separated by commas, to aid future searches for your publication) and a description (to provide context for the article and make it easier for people to read your notebook). Next, set the access rights for the article (public: accessible to all users / My network: only accessible to members of your network / private: only accessible to you). If you are a member of any groups, you can also publish the article to your groups' notebooks. To publish to one or more group notebooks, select the groups required. Finally, click "Share this article". A message will appear to confirm that the article has been published to your notebook.


You can access the shared item by clicking the "My notebook" link at the top left of

the screen.

Note: You can find articles shared by other Portaneo users by using the search engines provided by Portaneo. A list of articles matching the keyword(s) entered is displayed. You can then select the article that interests you.


Share a widget

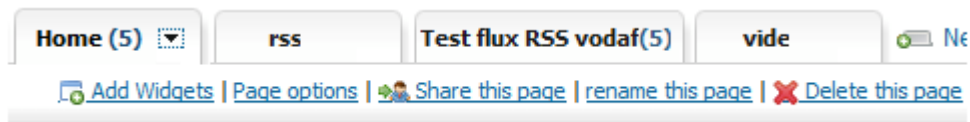
Widgets are shared in just the same way as information.

However, you use the  button shown below to share the widget:



Share a page (tab)

As with information and widgets, pages are shared by clicking the sharing icon: . This icon is shown when you click the vertical arrow on the right of the tab to be shared:



Having done so, sharing is managed in the same way as for sharing information.

Note: To find pages shared publicly (shared on a notebook with public access) by other users, click the "New page" link in the tabs bar. You will then be able to use a search engine where you can enter tags (or keywords) relating to the page you are looking for. A list of pages matching the keyword(s) entered will be displayed. Click the page that interests you to add it to your portal. The name shown on the tab for the page added will be that decided by the author of the page.

Managing your notebooks and group notebooks

A notebook is a collaborative area where authorised users can publish information intended either just for some users or for everyone.

There are two kinds of notebook:

- Personal notebooks: A personal notebook is a sharing area where some or all of the information shared by a single user can be found. Each Portaneo user has their own notebook.
- Group notebooks: A group notebook is an area where several people interested in a given topic can share information about it.

Access a Portaneo user's notebook

To view the notebook of another Portaneo user, first locate their user details, via your network, or in the directory of all users, or using the search engine.

To see their notebook, click the "Notebook" or "open notebook" link.

The personal notebook will be displayed as shown below:

The screenshot shows a web interface for a user's notebook. At the top, there is a breadcrumb trail: [Home](#) » [My notebook](#) » [Publications](#). Below this is a header section for "My notebook" featuring a user profile picture and a "Modify" link. A navigation menu includes "Profile", "Publications" (which is highlighted), "Contributions", "Public widgets", and "Write an article". Below the menu are utility links: "Refresh", "Add this notebook to my portal", and "Follow the comments", followed by a search input field. The main content area displays a list of publications:

- Thaïlande : l'armée recule face à 80 000 manifestants** (with a lock icon)
test9Thaïlande : l'armée recule face à 80 000 manifestants
Eric Mathieu • 28 March 2010 • 0 Trackback(s) • 0 comment(s) • [Modify](#) • [Options](#) ▼
- test eric Public** (with a lock icon)
test eric public cool !
Eric Mathieu • 26 March 2010 at 18h11 • 0 Trackback(s) • 1 comment(s) • [Modify](#) • [Options](#) ▼

Below the list, there is a section for a specific publication: "By [Eric Mathieu](#), 26 March 2010 at 18h11 | [Remove](#)". Underneath, it says "Venez voir !" and is followed by a dotted line.

The interface consists of the following items:

- Title and author of the notebook, in the top bar
- A menu bar providing access to various information about the user, in the top

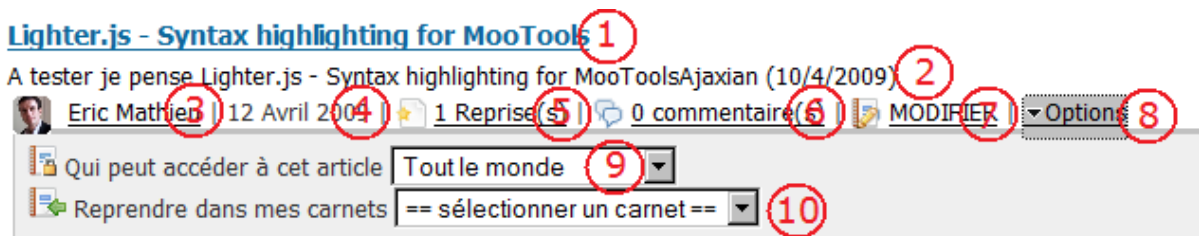
bar

- An options list, below the header, allowing the page to be refreshed or the notebook to be put into a widget
- A list of articles, each with title, partial text, publication information, tags, number of copies elsewhere, number of comments and options.

The menu gives access to public information about the notebook owner:

- Profile: summary of the person
- Publications: list of articles published / information shared by the person
- Network / People followed: the person's social network
- Groups : notebooks of the person's public groups
- Contributions: articles and comments by this person on notebooks
- Public widgets: public widgets from the person's portal

On the "Publication" page, each article is displayed as shown below:



- 1: Article title (writeable)
- 2: Article content (writeable)
- 3: Article author (read only)
- 4: Article publication date (read only)
- 5: Number of copies of article on other notebooks (read only)
- 6: Number of comments on the article
- 7: Link for modifying the article
- 8: Link for accessing article options
- 9: Access type of this article (public article: accessible to all users / only my network: only accessible to members of my network / private article: only accessible to the author)
- 10: Copy the article to another notebook. The drop-down menu contains a list of notebooks that you are authorised to modify

To view articles older than those shown on the page, use the "Next page" and "Previous page" buttons at the foot of the page.

Show article detail


Click the title of the article to display its full content. Further options appear

The screenshot shows a web interface with a navigation bar at the top containing links for 'Publications', 'Réseau', 'Contributions', 'Widgets', and 'Ecrire un article'. The main content area displays the article title 'Lighter.js - Syntax highlighting for MooTools' and a sub-header 'A tester je pense'. A red circle '1' is placed over the sub-header. Below the title is a link to the original article 'Lighter.js - Syntax highlighting for MooTools Ajaxian (10/4/2009)', with a red circle '2' next to it. A metadata line shows '<< Retour à tous les articles | Eric Mathieu | 12 Avril 2009 | MODIFIER | Options'. A 'Documents' section shows 'Aucun document' with a red circle '3'. A section titled 'Cet article est aussi présent sur les carnets suivants' lists 'Ajax' with a red circle '4'. Below this is a 'commentaire(s)' section with a form titled 'Ajouter un commentaire :'. The form has a label 'Votre message' and an 'Enregistrer' button. A red circle '5' is placed over the 'Ajouter un commentaire :' label.


- 1: Full article content
- 2: Link to the original article shared
- 3: List of documents linked to this article
- 4: List of notebooks where the article has been published
- 5: Area where comments can be entered.


Access a group notebook


A topic-oriented notebook is just the same as a personal notebook, except that multiple authors can manage its content.


 **developpement**
[Auteurs](#) | [Publications](#) | [Ecrire un article](#)

Membres du groupe

 **Chairat Suwannapak** : -il y a 84 jour(s)
[Contacter par email](#) | [Voir son carnet Portaneo](#) | [Inviter dans un groupe](#) | [Supprimer de mon réseau](#)

 **Cyril Kabache** : -il y a 13 jour(s)
[Contacter par email](#) | [Voir son carnet Portaneo](#) | [Inviter dans un groupe](#) | [Supprimer de mon réseau](#)

 **Eric Mathieu** : présentation de Portaneo au CG21 -
[Contacter par email](#) | [Voir son carnet Portaneo](#) | [Supprimer de mon réseau](#)

 **Gestionnaire** : **Philippe de Visse**
[Contacter par email](#) | [Voir son carnet Portaneo](#) | [Inviter dans un groupe](#) | [Supprimer de mon réseau](#)

Comment on an article

If an article is of particular interest to you, and you want to express an opinion on it, you can add a comment.

While reading an article, you can add a comment on the same screen, using the text box provided below the article.

Documents

Aucun document

commentaire(s)



Par **Eric Mathieu**, 17 Avril 2009 à 23h43 | [Supprimer](#)

Merci pour le compte rendu. Je suis vraiment content qu'on améliore la compatibilité avec Google. Depuis le temps qu'on me dit que Portaneo ne fonctionne pas avec les perdre de temps avec la 2x.

Ajouter un commentaire :

Votre message

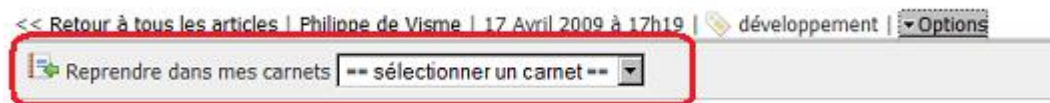
Enregistrer

When you confirm your comment, it is added to the end of the list of comments.

Copy an article

While reading notebooks, you can copy an article that interests you to your own notebook, or to the notebook of a group you belong to. Doing this makes the information available to your network and easier for you to find.

Click the "Options" link, then select the destination "my notebook" from the "Get in my notebooks" list.



The information shown below the title includes the total number of copies of the article. Click this number to see all the notebooks containing a copy of the information.

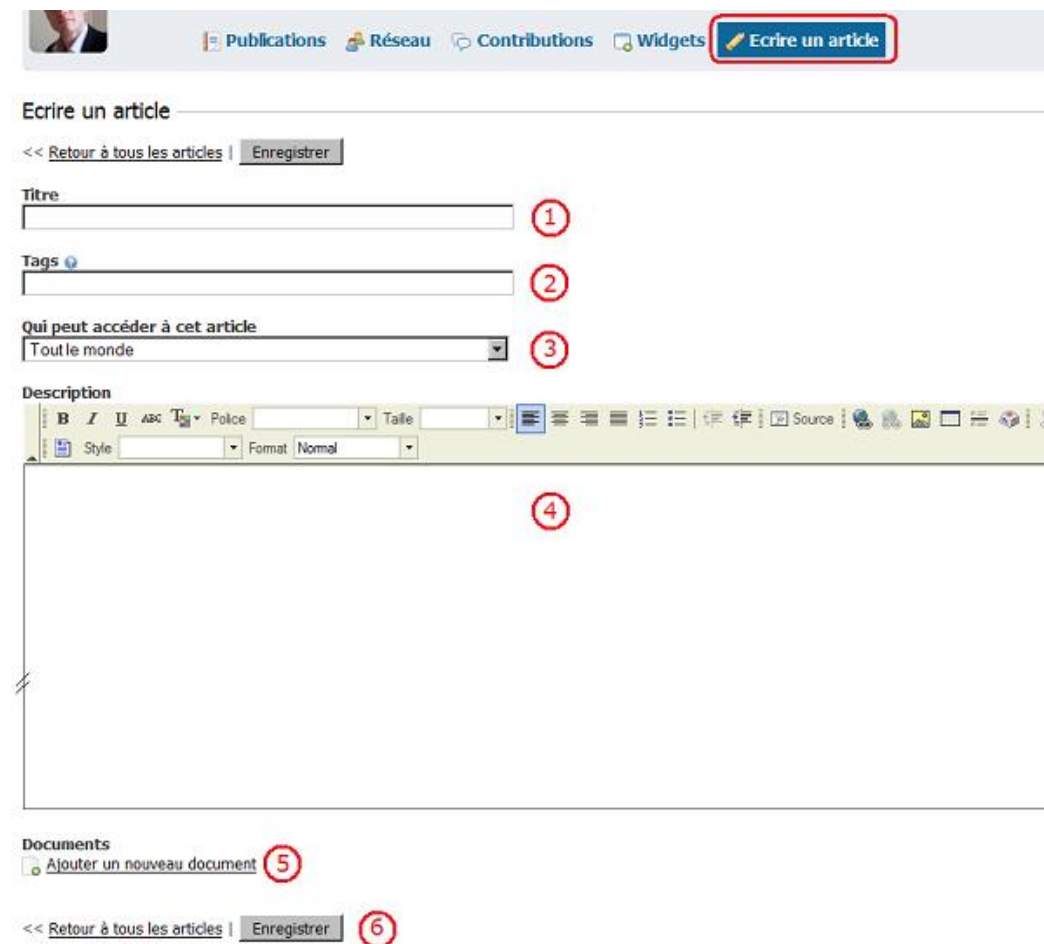
Access your notebook

To access your own notebook, click the "My notebook" link at the top-left corner of your portal.

Add a new article

- Starting with an empty page

To add an article, open your Portaneo notebook. Click "Write an article". The following screen will appear:



The screenshot shows the 'Ecrire un article' interface. At the top, there is a navigation bar with 'Ecrire un article' highlighted. Below this, the interface is titled 'Ecrire un article' and includes a navigation bar with '<< Retour à tous les articles | Enregistrer'. The main content area is divided into several sections: 'Titre' (1), 'Tags' (2), 'Qui peut accéder à cet article' (3), 'Description' (4), and 'Documents' (5). The 'Description' section features a rich text editor with a toolbar and a large text area. The 'Documents' section includes a link 'Ajouter un nouveau document' (5). At the bottom, there is a navigation bar with '<< Retour à tous les articles | Enregistrer' (6).

Use this screen to create a new article:

- 1: give it a title.
- 2: apply tags (or keywords) to it, so the search engine can find it.
- 3: specify whether it is accessible to everyone (public), or only to those in your network, or only to you (private).
- 4: type the article. A fully-featured editor allows you to format text and add pictures.
- 5: attach any documents (by clicking the "Add a new document" link).

When you are happy with the article, publish it by clicking the "Save" button (6).

- From another user's notebook

See the "Copy an article" section above.

- Using my portal

See the section above entitled "Share an article"

Change/remove an article

You can change an article in your notebook, whether you are its author or you copied it from another user's notebook. Click the "Modify" link for the article you want to change, found below the article content. If you are not authorised to modify the article, the link will not be shown (you may neither change nor remove an article copied from another user's notebook).

Search for an article

Each notebook includes a search engine that you can use to find articles. Type a keyword in the text box provided and click "Go".

A list of search results is displayed and you can select the article you were looking for.

Both the article title and its content are searched for matches. However, neither article author nor comments are included in the search.

Embed a notebook in a page

You can make it easier to access a notebook by adding it to one of your pages as a widget.

While you are viewing the notebook, click the "Add this notebook to my portal" link. A new widget is shown that contains the notebook. You can now move it using its title bar and drop it onto the tab for the page where you want it to appear.


If you select the tab where you dropped the widget, you will see it at the bottom of the extreme left-hand column.

Search Portaneo

The Portaneo search engine is near the top of your Portaneo portal, on the right. Type keywords into the text box and click "OK" to run a search.

You can also specify the kind of information you are looking for:

[Home](#) » Search (Tags)



in my notebook in public notebooks a widget people

Search in my notebook

This option can be used to search for articles in your notebook, based on their tags (keywords).

If you click on a search result, your notebook will open at the article found.

Search in other notebooks

This option can be used to search for articles in all notebooks except yours, based on their tags (keywords).

If you click on a search result, the notebook will open at the article found.



Tip: You can turn search results into a widget. Each time you open your portal, the widget will be automatically refreshed with the latest results from the search you used.

Search for a widget

You can search for widgets by entering keywords that will be matched against their titles and tags.

If you click on a search result, the widget will be displayed.

Search for a person

You can search for users by entering keywords that will be matched against their public tags.

If you click on a search result, the screen for adding the person to your network will be shown.

Portaneo search engines are neither case-sensitive nor accent-sensitive. Keywords can therefore be entered using upper or lower case, with or without accents. However, if several keywords are entered, they must be separated by commas. There is no limit to the number of characters than can be entered.

Create your own widgets

Authorisation to create widgets can be restricted to administrators only. If that restriction has been applied, the options shown below will not be visible in your portal.

To create a widget, open the "Add widgets" menu, then click the "My widgets" bar.

Now click the "Create widgets" link. Several options are displayed

- Add an RSS feed to the widget library

This option enables you to add an information widget to the widget library. You can do this by entering the address of the RSS feed and the following information:

- Title: Widget title. The title of the RSS feed is used as the default title

- Description: Description of the widget. The description of the RSS feed is used as the default description

- Site URL: URL of the site providing the widget (optional)

- Feed protected by login/password: specifies whether a user ID and password are required to access the feed (authenticated RSS feed)

- Widget language: specifies the language of the widget. The section of the library matching the language is displayed, in accordance with the language selected

- Always open articles in a new page: when checked, this option forces articles to be opened from the original site, and not using the Portaneo reader

- Tags: tags (keywords) relating to this widget (separated by commas)

To confirm, click the "OK" button

Then specify the position of the widget in the library, and the icon of the widget.

After it has been saved, the widget is submitted for approval by the Portaneo administrator. You must wait for approval before the widget is available for use

- Create a kwik'get widget (optional)

A kwik'get widget is one you can create without any computer skills. The functionality for this Portaneo extension is described in its documentation

- Create an advanced widget:

This is the most sophisticated type of widget. It can be used to access other applications, to read and process XML files, and for other advanced functionality.

A guide for creating widgets is available at http://url_de_portaneo/l10/fr/notice_expert.html (the link is shown on the horizontal bar)

When you have created your widget, click the "Test" button to preview it, or the "Next" button to save it.

Then enter:

- the title (which will be displayed in the widget title)

bar),

- the widget description (which will be displayed when viewing the widget),
- Tags: tags (keywords) relating to the widget (separated by commas)

Then confirm by clicking the "Next >>>" button

Add the following information

- Widget language: specifies the language of the widget. The section of the library matching the language is displayed, in accordance with the language selected
- Position in the library: suggests a place in the widget library for the widget (depending on the language selected)

To confirm, click the "Next >>>" button

Next, choose an icon for the widget and click "Next >>>"

After it has been saved, the widget is submitted for approval by the Portaneo administrator. You must wait for approval before the widget is available for use

Note:

Only administrators can create widgets using PHP or advanced JavaScript functionality. Some functionality is not available to users.

Optimise your use of Portaneo

Page load times

In order to reduce page loading time, when you start Portaneo, content is not loaded for all your portal pages. Only the content of the active page is loaded. Other pages are only loaded when you open them.

However, you can specify pages whose content you do want loaded as soon as you start Portaneo

Load-on-startup can be set using the "Load on startup" link under the "Configuration" menu option

When the page is loaded, the number of unread articles is shown next to the name of the page on the tab.

Double-secure your pages

You can select stronger security for some of your pages by checking the "Double-secure" box under the "Configuration" menu option.

This can be useful if you have enabled automatic login by checking the "Remember" box on the Portaneo login screen (see above). With that option enabled, anyone using your computer can access your Portaneo portal.

When you check the "Double-secure" box, a padlock icon is displayed on the page tab. When you click this icon, the page closes. To return to the page, you must re-enter your password (on the screen that appears - see picture)

Each time you open a double-secured page, you must enter your password to see it. If the page remains displayed for 30 minutes, it is again closed and the password must be re-entered to return to it.

When you create a new page, it is not double-secured by default.

To revert to normal page behaviour, uncheck the "Double-secure" option check box. The padlock icon (which indicates that a page is double-secured) is removed from the page tab.