Site Administration

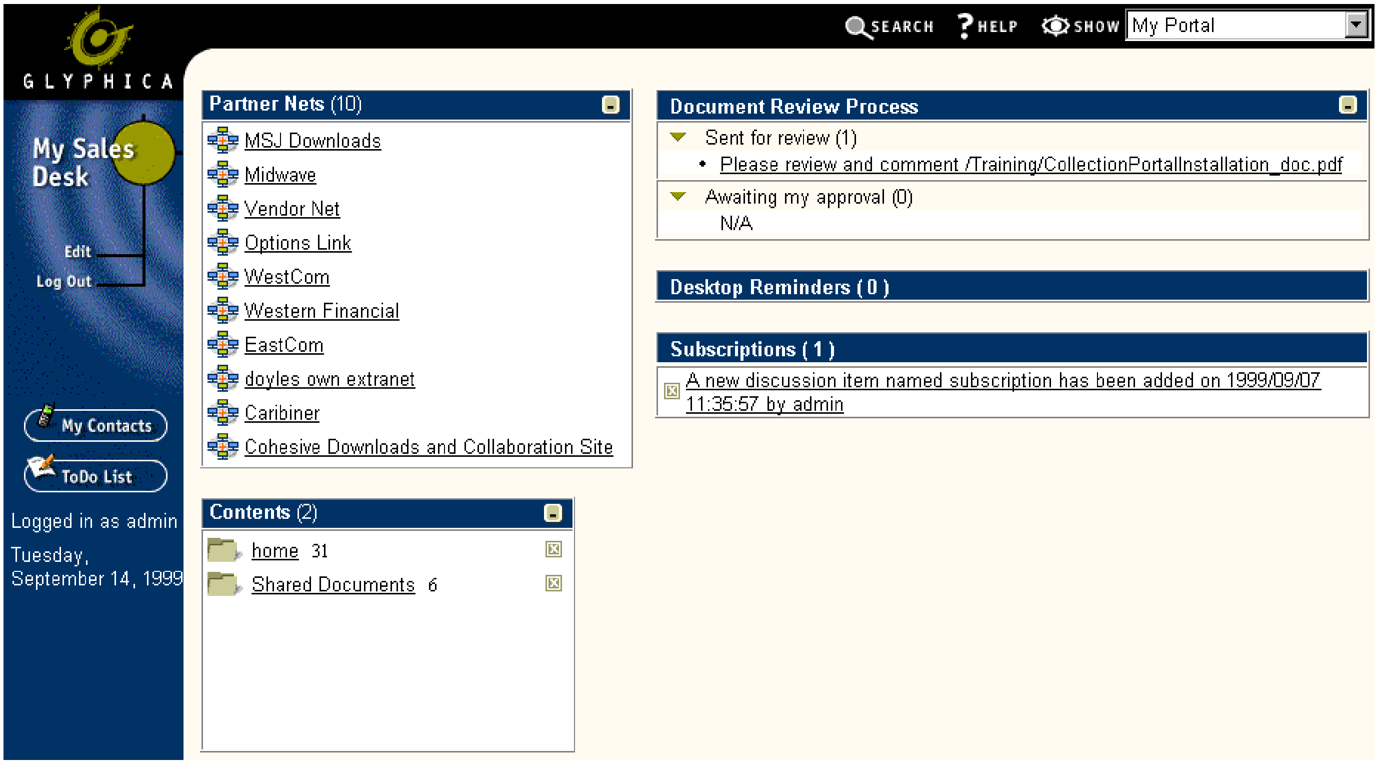
Site Administrators are the system owners. The Site Administrator can easily establish access for the members of the organization through the InfoPortal's fast configuration and simple user interface. Site Administrators are able to override Content Publisher settings and locks. They are able to perform optimization, batch updates, and back-up operations on collections.

Site Administrators have access to all of the same features as Content Publishers when logged in as Site Administrator. However, Site Administrators have additional features at their disposal, including:

- Change the Site Administrator password
- Define new Users or Groups for the system
- Modify Users and Groups:
  - Add, delete, and modify user information
  - Add, delete, and modify group information
  - Change passwords, including administrators
- Make system configuration changes:
  - Set system agent information
  - Set version history control settings
  - Include or exclude uploadable file types
  - Set and change link management options
  - Make distributed searches available to Content Publishers and/or users
  - Select authentication parameters for InfoPortal implementation
  - Arrange for mail forwarding, filtering, and ordering in InfoPortal
- Handle system maintenance:
  - View collection settings
  - Schedule database backups
  - Optimize collection performance
  - Index help and make it available to system users
  - Batch index metadata and/or batch version system files
  - Add, view, and modify Extranet information
- Manipulate metadata
- Add and update new system metadata attributes
- Delete system attributes
- Import and export bulk metadata
- Purge all metadata and document indexes
- Unlock Content Publisher-locked files
- Create version control archive paths
- Set Version Control on or off
- Select settings for log tracking, extract log information, and view logs
- Start and delete Discussion Groups
- View, set, and remove any and all security settings
- View, set, and remove any and all agent settings
- Install, configure, and test Glyphica Satellite Servers used for PDF generation and Palm Pilot operations

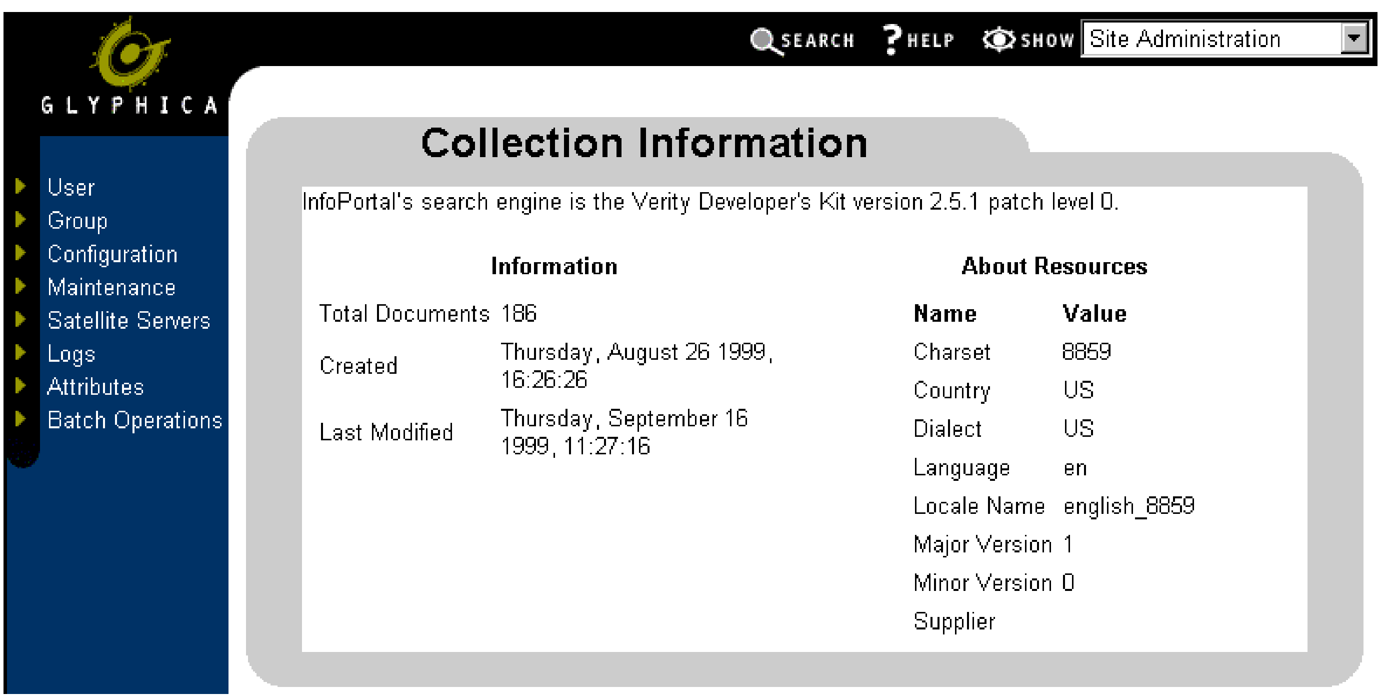
Interface Description

When you log in to InfoPortal with the Site Administrator ID and password, the My Portal view displays:



See “My Portal,” page 2.1 for a description of the parts of the My Portal view.

When you select Site Administration from the Show menu, the Site Administration view displays:



The Site Administrators screen contains the following areas:

- Side Navigation Bar
- Top Navigation Bar

Site Administration Side Navigation Bar

The Side Navigation Bar is located on the left-hand side of the Site Administration screen:

The Side Navigation Bar contains the following items:

- User menu
- Group menu
- Configuration menu
- Maintenance menu
- Satellite Servers menu
- Logs menu
- Attributes menu
- Batch Operations menu

Menu items that contain a submenu display a green triangle to the left of the menu name. The following tables list the menus in the Side Navigation Bar, a description of each, and where you can find the relevant user manual sections step-by-step task instructions

User Menu

Menu Item	Description	Associated Tasks
Create	Displays the User ID screen, where you can create users and passwords, assign profiles, and assign the user to one or more groups.	• "Creating a User," page 4.13
Find/Edit	Displays the Search Users screen, where you can search for users by login ID, first name or last name.	• "Finding a User," page 4.17 • "Editing a User Profile," page 4.18

Group Menu

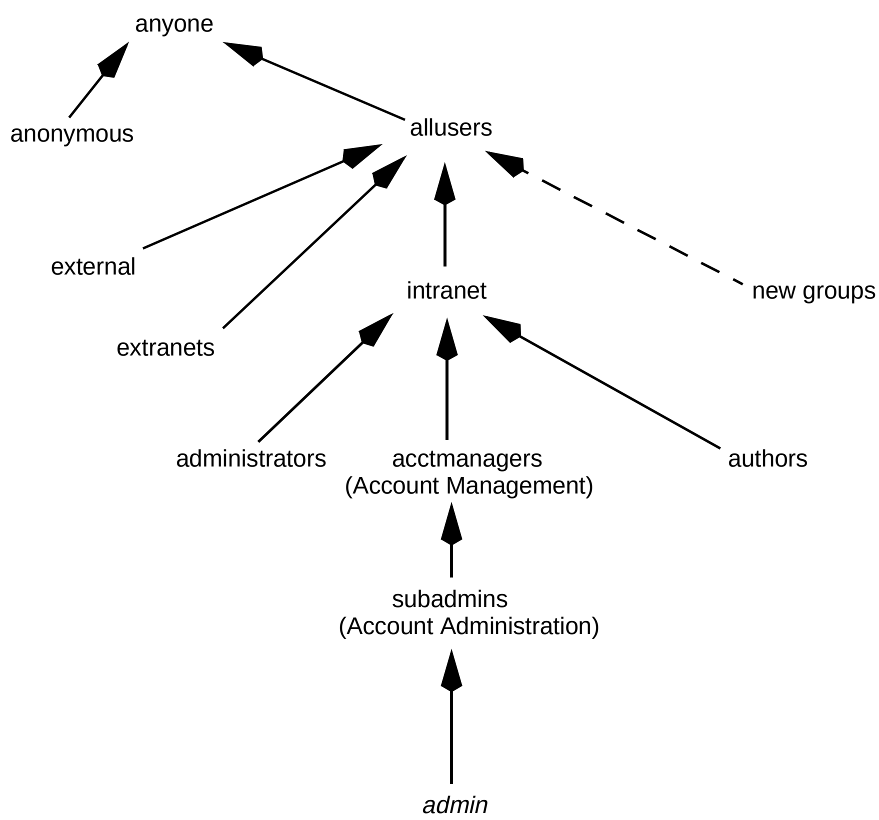
Menu Item	Description	Associated Tasks
Create	Displays the Group ID screen, where you can create groups and assign users to groups.	• "Creating a Group," page 4.24

Menu Item (Continued)	Description	Associated Tasks
Find/Edit	Displays the Search Groups screen, where you can search for users by login ID or display name.	• "Finding a Group," page 4.28 • "Editing a Group," page 4.29

The following default groups are shipped with InfoPortal 3.0:

Group ID	Group Name
intranet	Intranet
authors	Content Publishers
subadmins	Account Administrators
acctmanagers	Account Managers
administrators	Site Administrators
extranets	Extranets
external	External Users
allusers	Authenticated users
anyone	All (Authenticated and Nonauthenticated) users

The following graphic illustrates the hierarchy of permission rights these groups have:



Group rights are inherited—that is, user “admin” is also “administrator,” “subadmin,” and “author.” Likewise, a member of the “authors” group inherits “intranet” rights as well. These relationships are used in access controls.

Configuration Menu

Any time you use a function in the Configuration menu, you must restart the web server for the changes to take effect. The following table cross-references the appropriate procedures for supported servers and platforms:

Server	Platform	Task
Netscape Enterprise Server 3.5.1	Windows NT 4.0	“Stopping and Starting Netscape Enterprise Server Running on Windows NT,” page 4.64
Internet Information Server	Windows NT 4.0	“Stopping and Starting an Internet Information Server (ISS) Running on Windows NT,” page 4.65
Netscape Enterprise Server 3.5.1	Solaris 2.6, 2.7	“Starting and Stopping a Netscape Enterprise Server Running on Solaris,” page 4.66

Menu Item	Description	Associated Tasks
Agents	Displays the Agent Configuration screen, where you can change the SMTP server and email account information.	• “Modifying the Portal Agent Configuration,” page 4.30
Version Control	Displays the Version Control screen, where you can change the version repository directory path and set versioning by default.	• “Setting the Version Repository Directory,” page 4.31 • “Configuring Versions by Default,” page 4.32
Content Management	Displays the Content Management screen, where you can set the file extensions that the system will block from uploading, or renaming files to give them such extensions. This prevents security violations that could occur when a user uploads a script or program.	• “Setting Forbidden File Extensions,” page 4.33

Menu Item (Continued)	Description	Associated Tasks
Link Management	Displays the Link Management screen, where you can change the automatic link management settings for PDF and HTML documents. InfoPortal maintains a list of 1) All the links in a given document; 2) All the links that point to that document. The following are the parameters you can set: **Fix current** When you move a document, the links in that document will be updated so that any of them that were valid would still be valid. **Fix all** When you move a document, all of the valid links in it and the links in all of the documents that target it are updated. **Refresh status** This option causes all other documents to correct their links in relation to added or copied documents. **Manage by default** This option means that all of the copied and added documents have their links validated as part of the add or move (cut) process.	• “Configuring Link Hyper Management,” page 4.34
Distributed Search	Displays the Distributed Search screen, where you can set up, modify, or delete a server address for a distributed search across the network.	• “Creating a Distributed Search,” page 4.34 • “Modifying a Distributed Search,” page 4.36 • “Deleting a Distributed Search,” page 4.37
Authentication	Displays the Authentication screen, where you can set up and change the settings for Glyphica, NT, and LDAP for user authentication.	• “Configuring Authentication,” page 4.39
Post Office	Displays the E-Mail Delivery and Receipt screens, where you can set up and change the settings for the server e-mail account and postmen.	• “Creating and Changing the E-Mail Delivery Configuration,” page 4.48

Menu Item (Continued)	Description	Associated Tasks
Mailboxes	Displays the Create New Filter screen, where you can create mailbox filters. Mailbox filters relay mail from one mailbox to another. Mailboxes contain the extension .mbx. Attached messages, inline images, and other non-text/non-HTML content are broken out into separate documents. These documents are indexed separately when the message arrives at its final destination. In addition to indexing mail, you can search on it and apply metadata to it.	• “Creating a Mailbox Filter,” page 4.55

Maintenance Menu

Menu Item	Description	Associated Tasks
System Info	Displays the Collection Information screen, including information about the database collection. Information includes database software version, total documents, database creation date and time, last modification date and time, and resource values.	• “Viewing System Information,” page 4.59
Backup	Displays the List of Scheduled Backups screen, where you can add, remove, modify, and stop automatic backups. The List also shows the backup process name, the number of times to repeat the process, the startup time, and when the process has completed. Each backup is placed in a separate folder in the directory you specified. The folder's name is designated in a year/month/day format, for example <backup19990729>, where 1999 is the year, 07 is the month and 29 is the day.	• “Creating a Backup Schedule,” page 4.60

Menu Item (Continued)	Description	Associated Tasks
Optimize	Displays the Optimize Collection screen, where you can optimize the search index by performing various functions on it. The following are the parameters you can set: **Do maximal merging** Performs merging of the partitions to create partitions that are as large as possible. This creates partitions that can have as many as 65,000 documents in them. It is faster to search over a single partition when the search engine has to open only one file. **Squeeze deleted documents out of the search index** Recovers space, which improves search performance. **Optimize** Linearizes the index data, making it more streamlined. It also allows the index to grow to a much larger size. In effect, Optimize sacrifices some disk space to get faster searches. InfoPortal runs the Optimize feature every night at midnight. **Create spanning word list** Creates one word list across all index partitions. Like Optimize, this function trades off disk space for greater speed. **Do maximal cleanup** Performs the most comprehensive housekeeping possible, removing out-of-date index files. This selection is recommended only if an isolated index is being prepared for publication, or if the document database takes up more than 20% of the space occupied by the documents it manages.	• "Optimizing the Search Index," page 4.67
Help	Makes the online help files searchable for authors and users.	• "Indexing the Help Files," page 4.69
Index Purge	Displays the Purge Collection screen, where you can clear all information from the search index. The documents, metadata, and field aliases are left intact. However, you will not be able to search on them until the documents have been indexed again.	• "Purging the Search Index," page 4.70 • "Restoring the Database from a Backup," page 4.64

Menu Item (Continued)	Description	Associated Tasks
Extranets	Displays the Search for Extranets screen, where the Site Administrator can search for existing Extranets by Extranet Name or Extranet ID. The Site Administrator can then manage the selected Extranet as an Account Administrator.	• "Finding an Extranet," page 5.22

Satellite Servers Menu

Menu Item	Description	Associated Tasks
Initialize	Displays the Initialize Glyphica Satellite Servers screen, where you can perform the following tasks for Glyphica Satellite Servers: • Configure Adobe Capture settings • Configure Adobe Acrobat settings • Initiate and Configure Satellites • Compile a list of available Satellite printers	• "Configuring Adobe Capture Settings," page 4.73 • "Configuring Adobe Acrobat Settings," page 4.74 • "Options: Optimize for Screen, Optimize for Print, Optimize for PressInitializing and Configuring Satellite Servers," page 4.74 • "Checking Satellite Printer Availability," page 4.75
Verify	Displays the Sample Files for PDF Conversion screen, where you can verify PDF conversion from various formats using the sample files provided with InfoPortal.	• "Testing PDF Conversions," page 4.76 • "Configuring Adobe Capture Settings," page 4.73 • "Options: Optimize for Screen, Optimize for Print, Optimize for PressInitializing and Configuring Satellite Servers," page 4.74
Add	Displays the View Configured Glyphica Satellite Servers and Add Glyphica Satellite Servers screens, where you can view the current Glyphica Satellite Server configurations and add new Satellite servers.	• "Viewing Current Satellite Server Configurations," page 4.79 • "Adding a Glyphica Satellite Server," page 4.78
Modify/Delete	Displays the Modify/Delete Glyphica Satellite Servers screen, where you can change Glyphica Satellite Server settings (hostname/IP address, port number, and communication mode) and delete Satellite servers.	• "Viewing Current Satellite Server Configurations," page 4.79 • "Deleting Glyphica Satellite Servers," page 4.81

Logs Menu

Menu Item	Description	Associated Tasks
View	Displays the Log screen, where you can view the log entries and set the file length for the view. The view default setting is the last 2048 bytes in the file. Maximum bytes viewable is limited by the system and available memory. InfoPortal can access up to 2GB of log data. Log entries are divided into daily files. You will not see a change in the log view if you type a larger number and you are already viewing the entire log for that day.	• “Viewing the Log,” page 4.81 • “Setting the Log View Length,” page 4.82
Settings	Displays the Log Configuration screen, where you can set the log directory location and choose the items that will be placed in the log.	• “Setting the Log Location,” page 4.84 • “Configuring Log Entries,” page 4.83
Delete	Displays the Log Deletion screen, where you can delete one or more log files from the list that displays. Log entries are divided into daily log files.	• “Deleting Log Files,” page 4.85
Extranet	Displays the Extranet Log screen, where you can export Extranet usage information to a file.	• “Extracting an Extranet Log,” page 4.86

Attributes Menu

Menu Item	Description	Associated Tasks
Add/Delete	Displays the Add/Delete Attributes screen, where you can add metadata fields to or delete them from the entire database.	• “Adding Attributes,” page 4.87
Modify	Displays the Edit Form screen, where you can modify the values of existing metadata fields. You can also hide existing metadata fields so they do not display. These actions apply to all of the documents in the database.	• “Modifying Attributes,” page 4.90 and “Deleting Attributes,” page 4.91

Batch Operations Menu

Menu Item	Description	Associated Tasks
Index	Displays the Index Documents screen, where you can select files for batch indexing without metadata.	• “Batch Indexing Documents,” page 4.94

Menu Item	Description	Associated Tasks
Version	Displays the Batch Versioning screen, where you can select files for batch versioning.	• “Batch Versioning Documents,” page 4.96

Import Menu

Menu Item	Description	Associated Tasks
Import	Displays the Import Metadata screen, where the Site Administrator can import documents into InfoPortal from an existing document management system or document inventory. The Site Administrator selects a data-file for metadata import and picks a base URL to provide a physical path for comparison.	• “Importing Documents and Metadata,” page 4.99

Export Menu

Menu Item	Description	Associated Tasks
Export	Displays the Export metadata screen, where you can export metadata from the system for reports or importing into other processing systems. This sends the metadata as a file under the MIME type "application/download." Save it in your local filesystem when the dialog box appears, then open it as a text file (.csv extension).	• “Exporting Metadata,” page 4.101

Content Publishing View

Certain functions in the Content Publishing view are only accessible by Site Administrators and Account Administrators. Therefore, Content Publishers do not see these menu items unless they also have Account Administrator or Site Administrator privileges.

Discussions Menu

Although the Discussions option is in the Content Publishing view under File, only Site Administrators and Account Administrators can create new Discussion Groups. Therefore, only they can see the Discussion link in the File menu. Discussion Groups allow Content Publishers and Extranet Users to interact in a “conversational” mode. They post messages about a topic to a central location, where others can read those messages and respond. The messages and responses are grouped in a hierarchical structure, according to topic, in the Discussion window (see “The Discussion Window,” page 3.34 for more information). All Discussion Group postings and attachments to those postings are indexed by InfoPortal and may be searched.

Menu Item	Description	Associated Tasks
New Discussion	Displays the New Discussion Group screen, where you can set up a discussion group within the current directory (only Account Administrators and Site Administrators can create new Discussion Groups).	• “Starting a New Discussion,” page 4.105

Mailboxes Menu

The Mailboxes menu lets Account Administrators and Site Administrators view and configure the criteria by which mail will be forwarded from a selected mailbox to another mailbox.

You must select a folder or document in the Content Area before clicking on the menu link. If you do not select an item first, you will get an error message similar to the following:

Menu Item	Description	Associated Tasks
Add Forwarding	Displays the Set Mail Filter screen, where Site Administrators can configure the criteria by which mail will be forwarded from a selected mailbox to another mailbox.	“Adding Mailbox Forwarding,” page 4.104
View Forwards	Displays the Mail Filters screen, a read-only screen that lists the current mail forwarding criteria set for a selected Mailbox folder. This screen displays the name of the filter, the location to which mail is forwarded (Destination Mailbox), and the Forwarding Criteria that has been implemented (Filter).	“Viewing Mailbox Forwards,” page 4.105

Top Navigation Bar

See “Top Navigation Bar,” page 1.3 for a description of the Top Navigation Bar.

Site Administration Tasks

The Site Administrator's major function is to create/administer the users and groups within the system and to oversee the basic system stability.

Creating a User

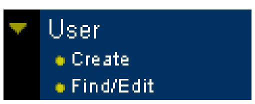
When the Site Administrator creates a user or imports a user from another authentication system (LDAP, NT, etc.), the primary goal is to define the user's views in the My Portal window and to define what areas of the system the user does or does not have access to.

Note

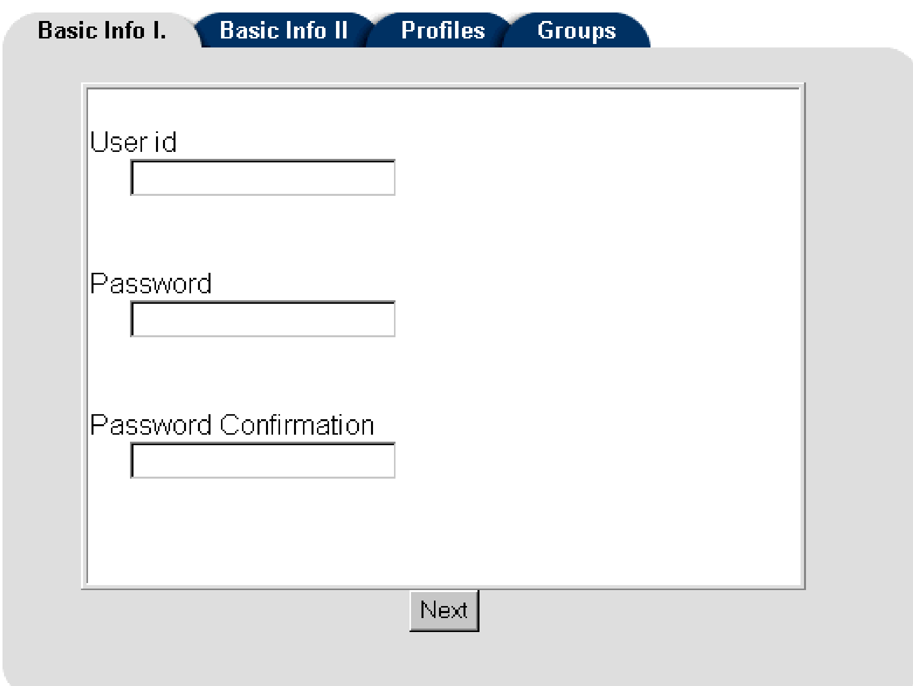
You can use alternative methods of authentication, including NT, LDAP, and SOLARIS NIS.

This procedure adds a user to the system, using the Glyphica authentication scheme, and assigns the appropriate functions and views to the user’s profile.

1. In the Side Navigation Bar, click on the User menu triangle to expand it.



2. Click on the Create link.
   - The Create User screen displays:



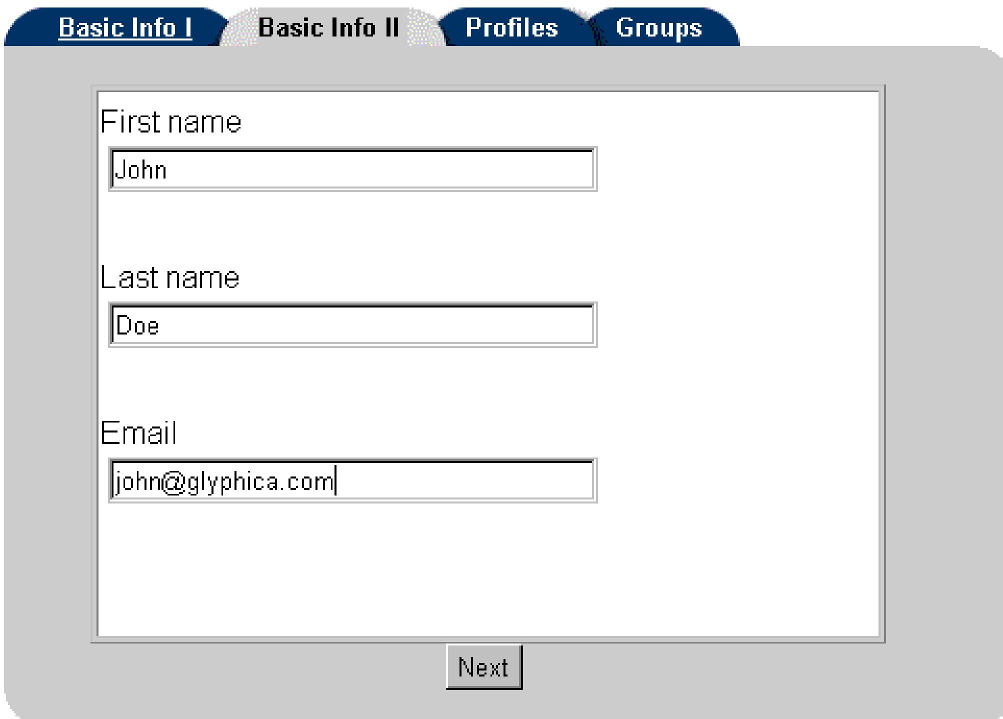
3. Enter the user ID.

Note

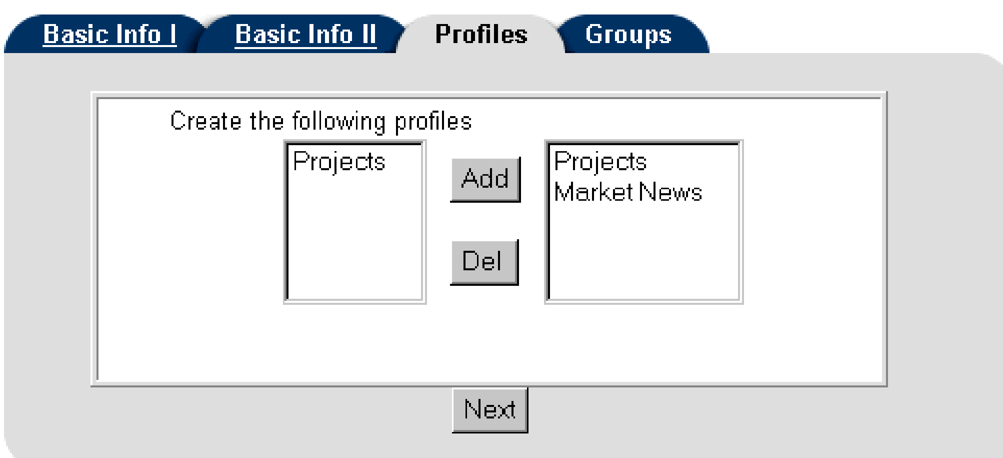
User IDs and passwords are case-sensitive in InfoPortal.

- This is the ID the user will always enter to log into InfoPortal.

4. Enter the password.
5. Enter the password again to confirm.
6. Click on the Next button.
7. Enter the user's first name.
8. Enter the user's last name.
9. Enter the user's email address.



10. Click on the Next button.

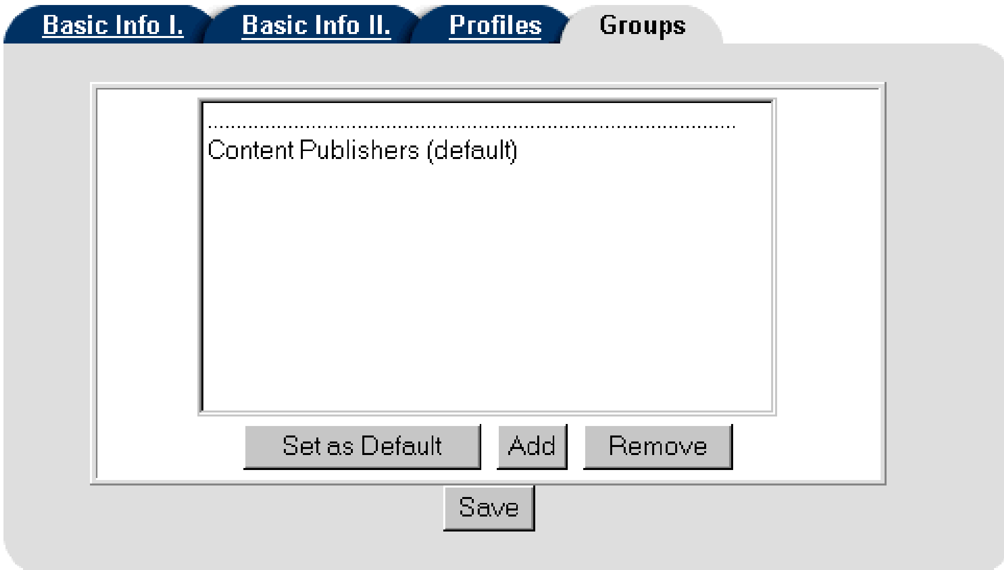


11. To add a profile, click on the profile name in the right-hand column.
12. Click on the Add button.
13. To remove a profile from the left-hand column, click on the profile name.
14. Click on the Del button.

Note

Profiles define what windows the user sees in their My Portal view. Most InfoPortal installations will contain a list different from what you see here. However, the "Projects" profile is a window that shows the basic contents of the system.

15. When finished, click on the Next button.



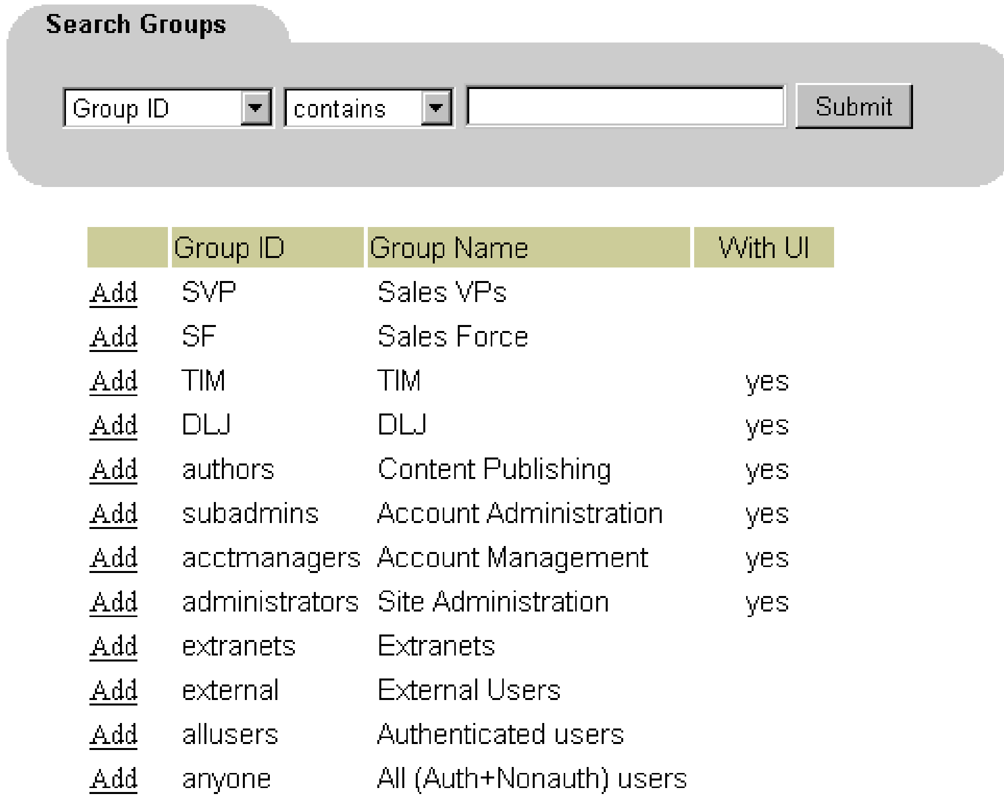
16. To add the user to a group (multiple groups are allowed), click on the Add button.
    - This will take you to a screen that lets you find existing groups and add them to this user's profile.
    - The Search Groups screen displays in a separate window.

17. Input your search criteria. You can search on Group ID or Display Name.
    - Clicking on the Submit button returns a list of all groups in the system.
18. Click on the Submit button.

Note

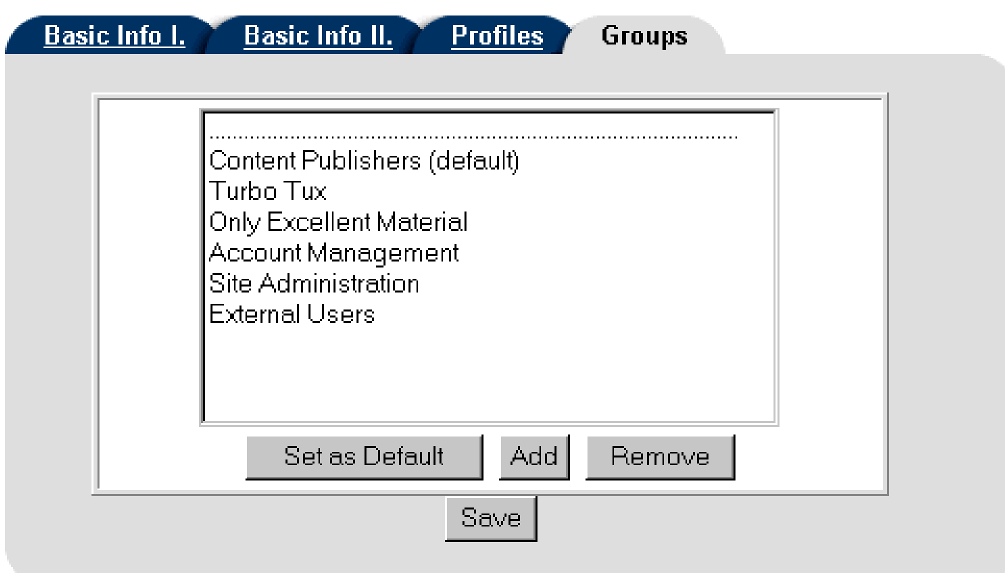
Groups are used to assign access and functionality privileges to the user. See “Group Menu,” page 4.3 for details. In addition, see “Security (files and folders) Overview,” page 3.42 for details on how group membership can affect access to the collection.

- The search results display:

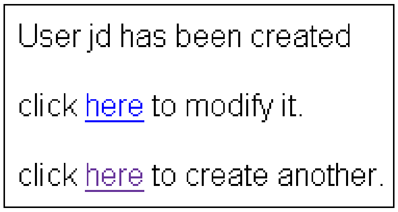


- See “Group Menu,” page 4.3 for a table that lists the default groups shipping with InfoPortal 3.0 and their respective permissions.

19. Click on the Add link for each group you want to add.
    - (The new user is automatically added to the anyone and allusers groups.)
20. Click on the close box ☒ to close the Search Groups window.
    - The group name is added to the profile:



21. Users are added to the Content publishing group by default, and given that user interface (my portal, content publishers) automatically.
22. Click on the Set As Default button.
23. Click on the Save button.
    - A confirmation message displays.



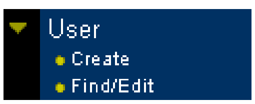
- Use the "click here to modify it" link to edit the user you just created. Use the "click here to create another" link to create another new user.

> **Note**
> Setting a Default Group that has no interface associated with it means the user may not be able to log in to InfoPortal.

Finding a User

This procedure searches for an existing user in the system. It is useful for locating a distinct user and changing their password (the Site Administrator cannot view user passwords, only change them if they forget their password). See “Editing a User Profile,” page 4.18 for more details.

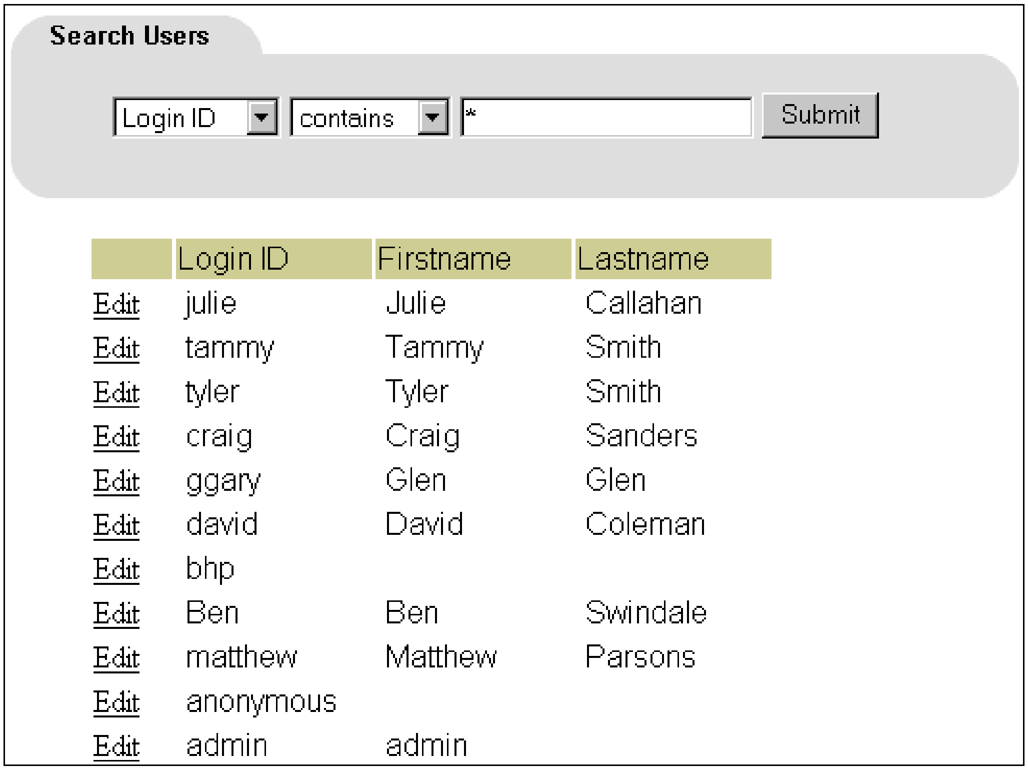
1. In the Side Navigation Bar, click on the User menu triangle to expand it. .



2. Click on the Find/Edit link.
    - The Search Users screen displays:

3. Enter your search criteria:
    - Clicking on the Submit button, without selecting anything, returns all users in the system.
    - Searches can be created for Login ID, First name, Last name, or Full name.
    - The following operators are available: contains, begins with, equals.
    - Wildcards are allowed in the text box. For example, a search on "Smi?" will return users with names such as Smith or Smithson. An asterisk (*) alone entered into the text box returns all users in the system.
4. Click on the Submit button.

- The search results display:

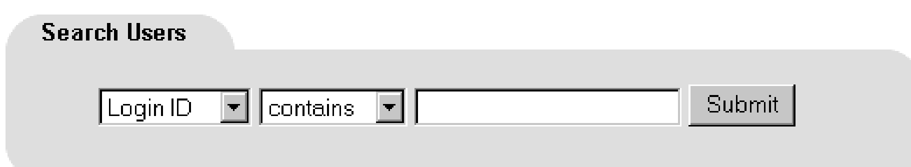


Editing a User Profile

This procedure finds and edits an existing user profile in the system. The Site Administrator may at any time update the user's profile information, their name, password, or group memberships.

In the Side Navigation Bar, click on the User menu triangle to expand it. .

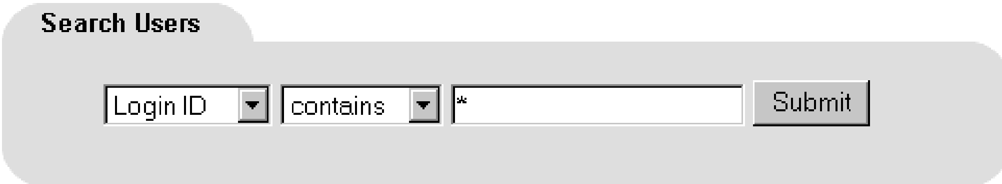
5. Click on the Find/Edit link.
   - The Search Users screen displays:



6. Enter your search criteria.
   - Clicking on the Submit button, without selecting anything, returns all users in the system.
   - Searches can be created for Login ID, First name, Last name, or Full name.
   - The following operators are available: contains, begins with, equals.

- Wildcards are allowed in the text box. For example, a search on "Smi?" will return users with names such as Smith or Smithson. An asterisk (*) alone entered into the text box returns all users in the system.

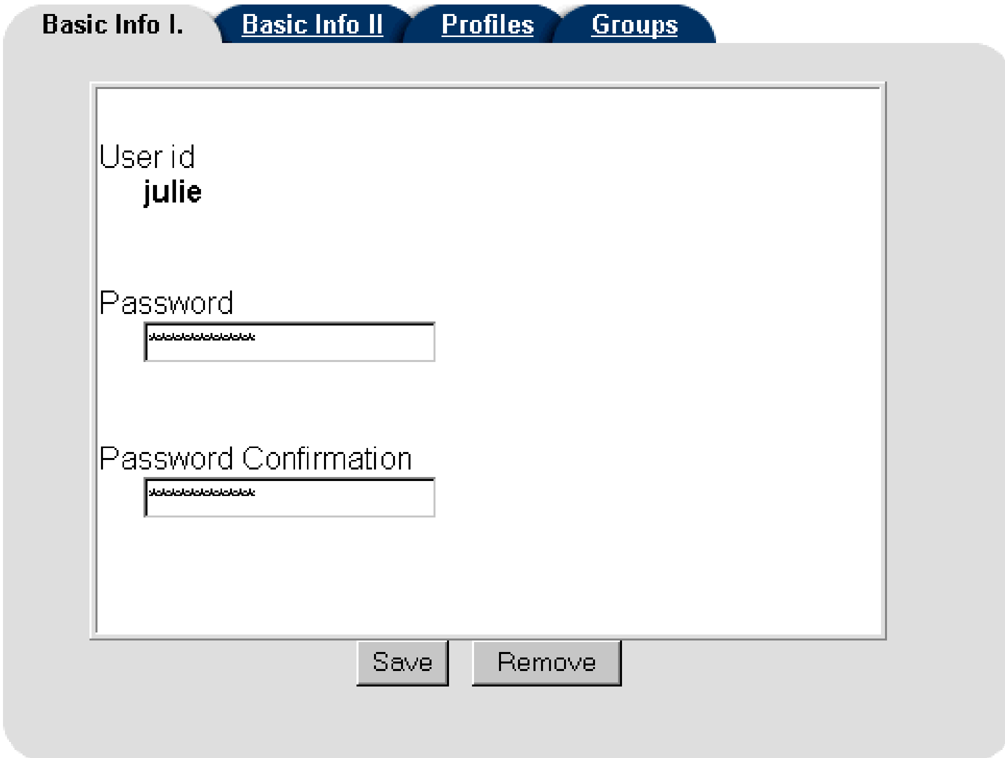
7. Click on the Submit button.
   - The search results display:



	Login ID	Firstname	Lastname
Edit	julie	Julie	Callahan
Edit	tammy	Tammy	Smith
Edit	tyler	Tyler	Smith
Edit	craig	Craig	Sanders
Edit	ggary	Glen	Glen
Edit	david	David	Coleman
Edit	bhp		
Edit	Ben	Ben	Swindale
Edit	matthew	Matthew	Parsons
Edit	anonymous		
Edit	admin	admin	

8. Click on the Edit link.

- The user ID screen displays:



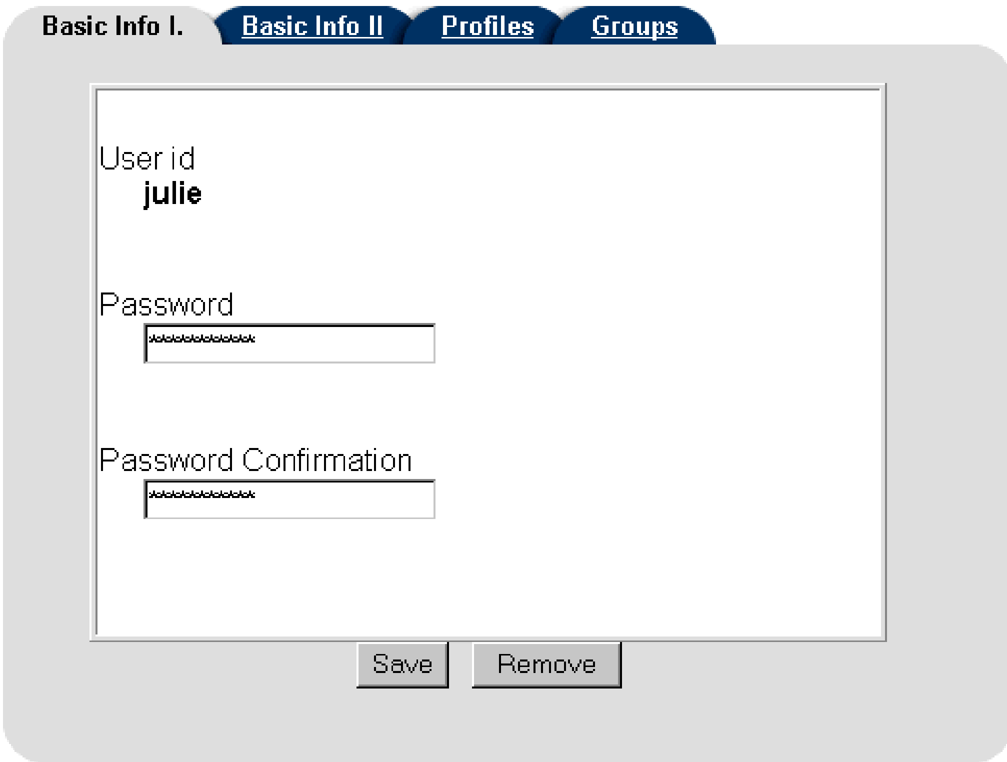
9. Click on the appropriate tab to go to the field(s) you want to change. See "Creating a User," page 4.13 for details.
10. Make the appropriate changes.
11. Click on the Save button.

Deleting a User

This procedure deletes an existing user in the system. Deleting a user means that the user is entirely removed from the system; this should only be used when a user leaves the company or is no longer allowed any access whatsoever into the system. To limit a user to specific areas of the system without actually removing them from the system, see "Security (files and folders) Overview," page 3.42.

1. See "Finding a User," page 4.17 for instructions on how to display the user's profile.
2. Click on the Edit link for the user you wish to delete.

- The user ID screen displays:



3. Click on the Remove button.
   - A confirmation message displays:

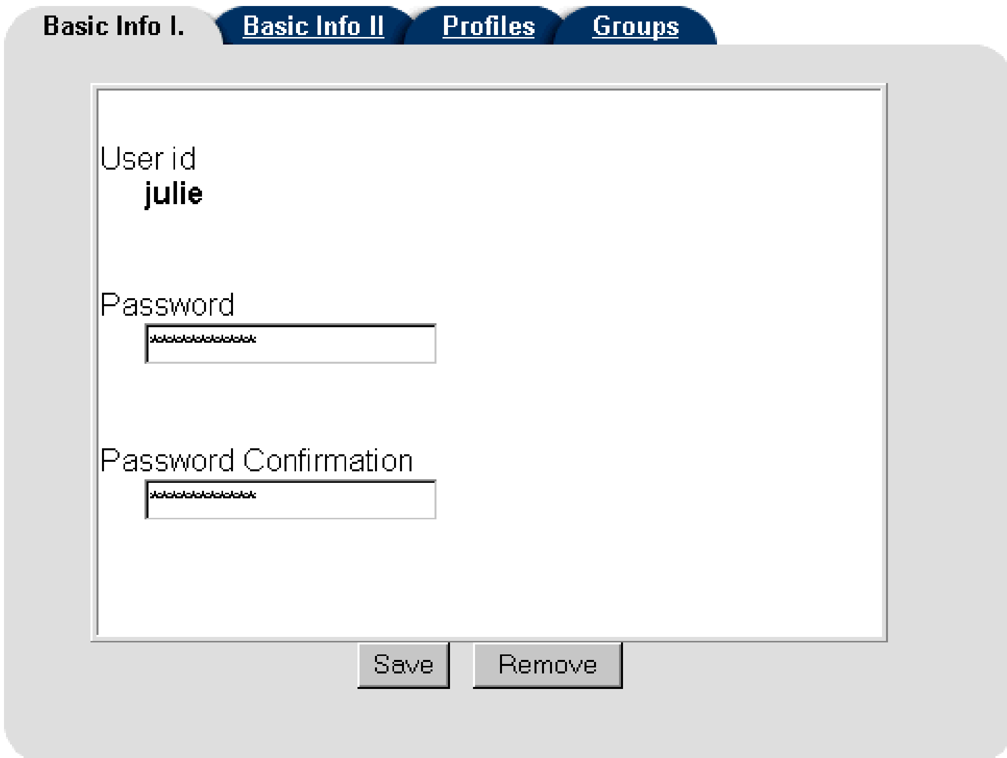
4. Click on the OK button.
   - A confirmation message displays:

Changing a User's Default Group

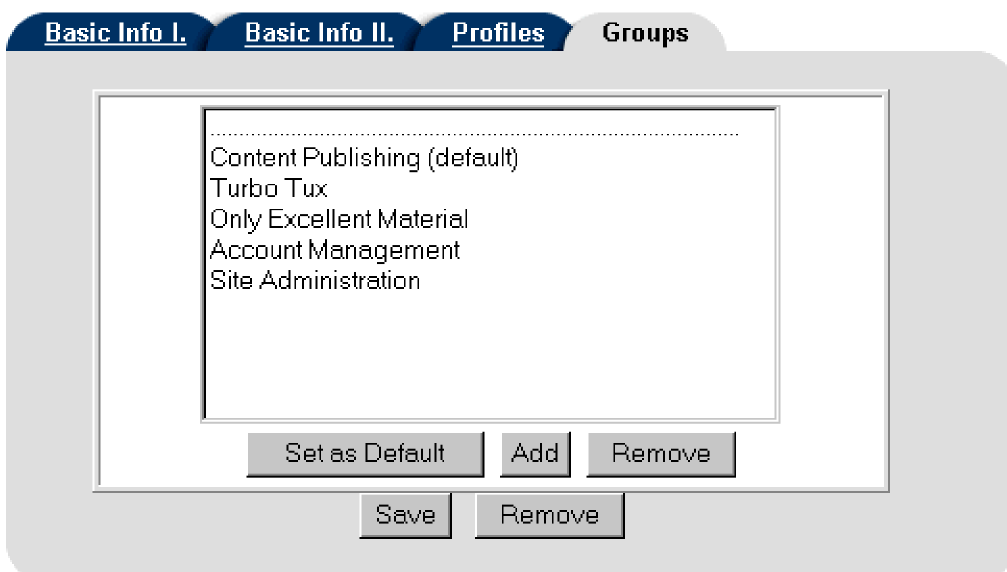
The Groups to which the user belongs often assign access and functionality privileges to the user. See "Group Menu," page 4.3 for details. In addition, see "Security (files and folders) Overview," page 3.42 for details on how group membership can affect access to system control.

1. See "Finding a User," page 4.17 for instructions on how to display the user's profile.
2. Click on the Edit link for the user you wish to change.

- The User ID screen displays:

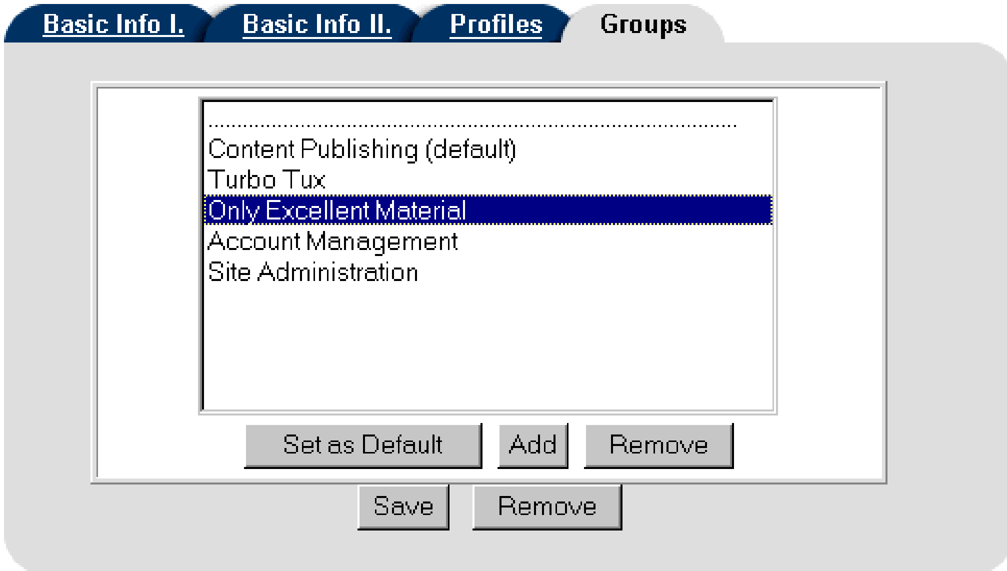


3. Click on the Groups tab.
   - The Groups screen displays:

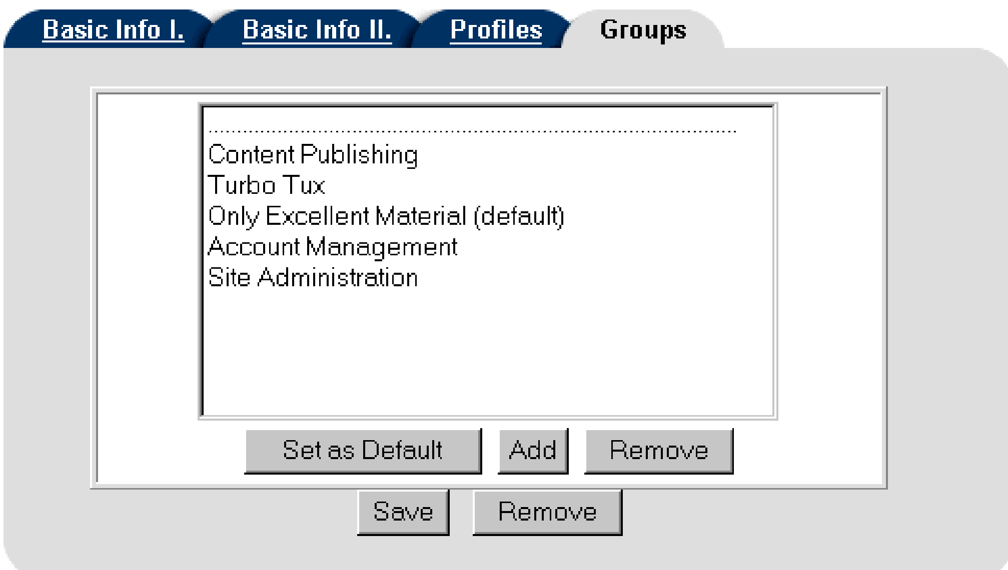


4. Click on the group name you want for the default.

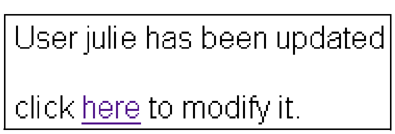
- This highlights the name.



5. Click on the Set as Default button.
   - The default tag changes.



6. Click on the Save button.
   - A confirmation message displays.



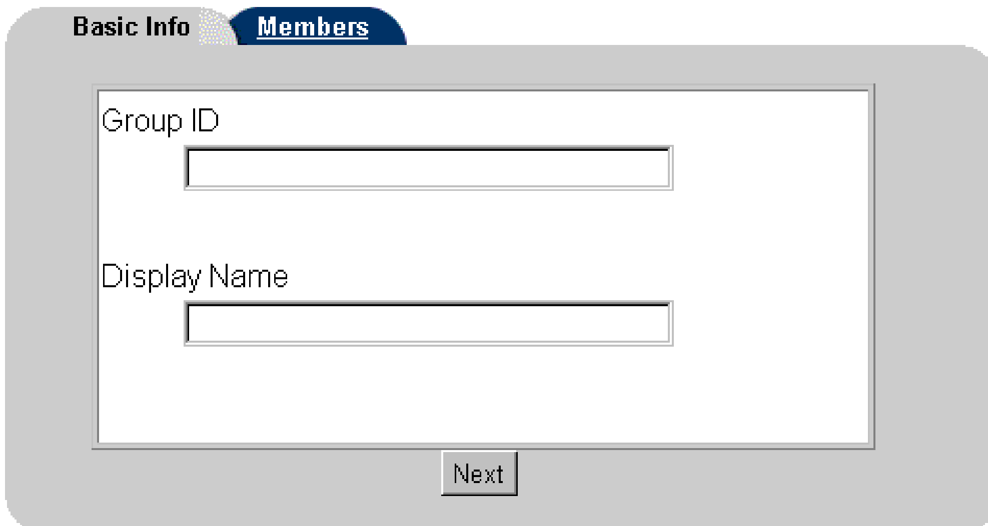
   - Use the "click here to modify it" link to go back and edit the user you just modified.

Creating a Group

This procedure creates a new group in the system. Creating the group is just the first step. Once the group is created, you must add users to the group—or as you create users, add them into the group. See the section on adding users to groups See “Creating a User,” page 4.13

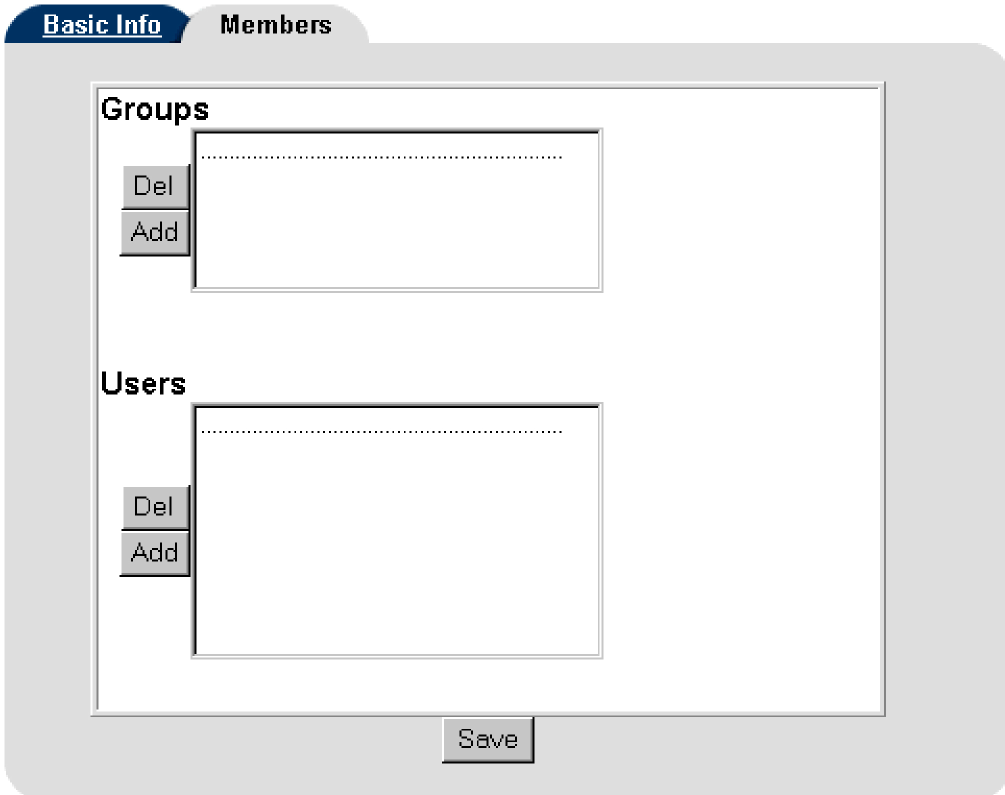
7. In the Side Navigation Bar, click on the Group menu triangle to expand it. .

8. Click on the Create link.
9. The Create Group screen displays:

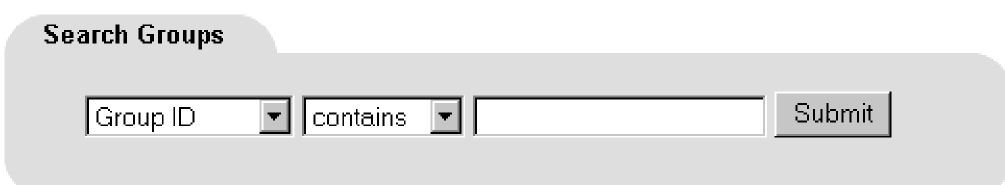


10. Enter the group ID.
    - The Group ID is the name that will show in the Search Groups window.
11. Enter the group name in the Display Name field. The Display Name is the name that will be used when adding access controls. This can be any length, and should be descriptive of the function and membership of the group (examples: Marketing Executives or Eastern Sales Force).
12. Click on the Next button.

- The Members screen displays:

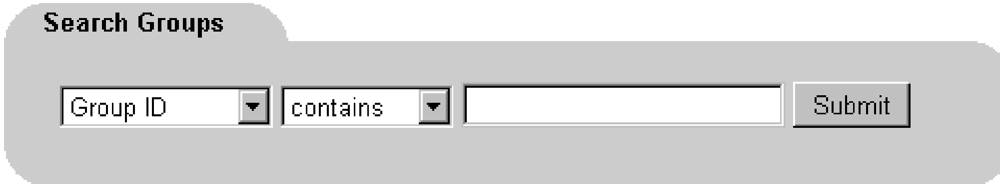


13. If you want to add a group as a member of this new group, click on the Add button under Groups.
    - Please note that it is possible to add groups to groups. For example, you might have a small group called "Sales VPs" and a larger group called "SalesForce." It might be useful at times to be able to say that any place the SalesForce has access, the Sales VPs have access too—so you add the Sales VPs group to the SalesForce group. However, the inverse may not be true—so the SalesForce group should not be added to the Sales VPs group.
    - You may not add groups together—that is, if you make the Sales VPs group part of the SalesForce group, you will not be able to add the SalesForce group to Sales VPs. Two system-created accounts function this way: you may not add the allusers group or the anyone group to a newly-created group.
    - The Search Groups screen displays in a separate window.



14. Enter your search criteria.
15. Click on the Submit button.

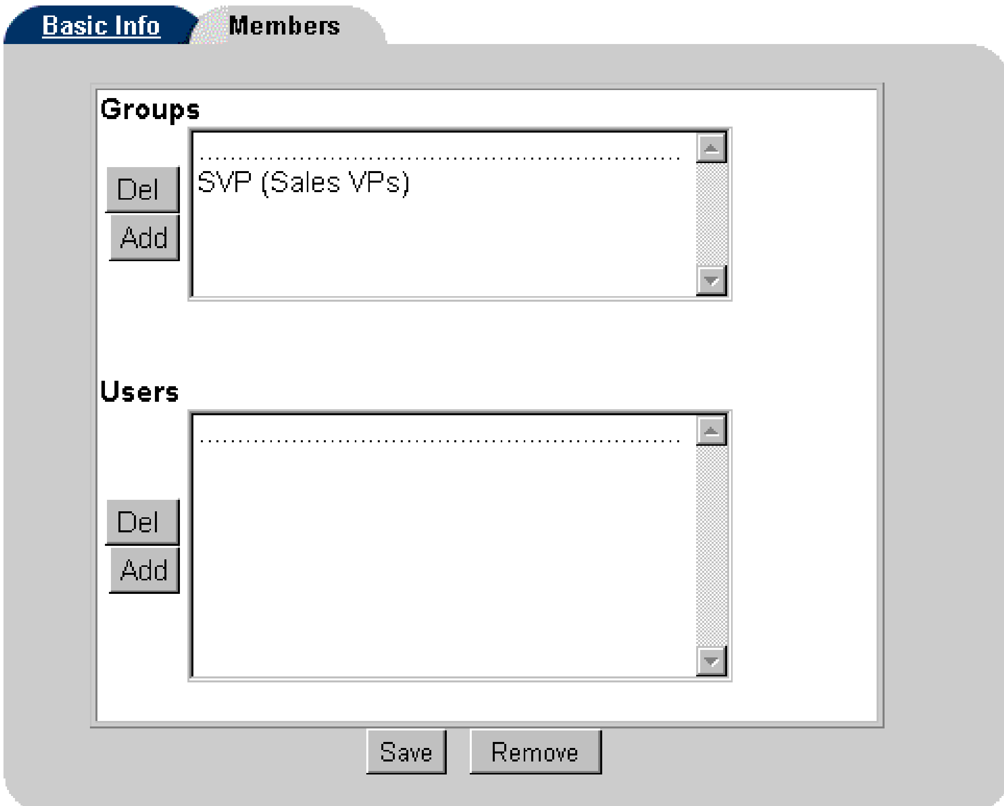
- The search results display:



	Group ID	Group Name	With UI
Add	SVP	Sales VPs	
Add	SF	Sales Force	
Add	TIM	TIM	yes
Add	DLJ	DLJ	yes
Add	authors	Content Publishing	yes
Add	subadmins	Account Administration	yes
Add	acctmanagers	Account Management	yes
Add	administrators	Site Administration	yes
Add	extranets	Extranets	
Add	external	External Users	
Add	allusers	Authenticated users	
Add	anyone	All (Auth+Nonauth) users	

16. Click on the Add link for each group you want to add.
17. Click on the close box to close the Search Groups window.

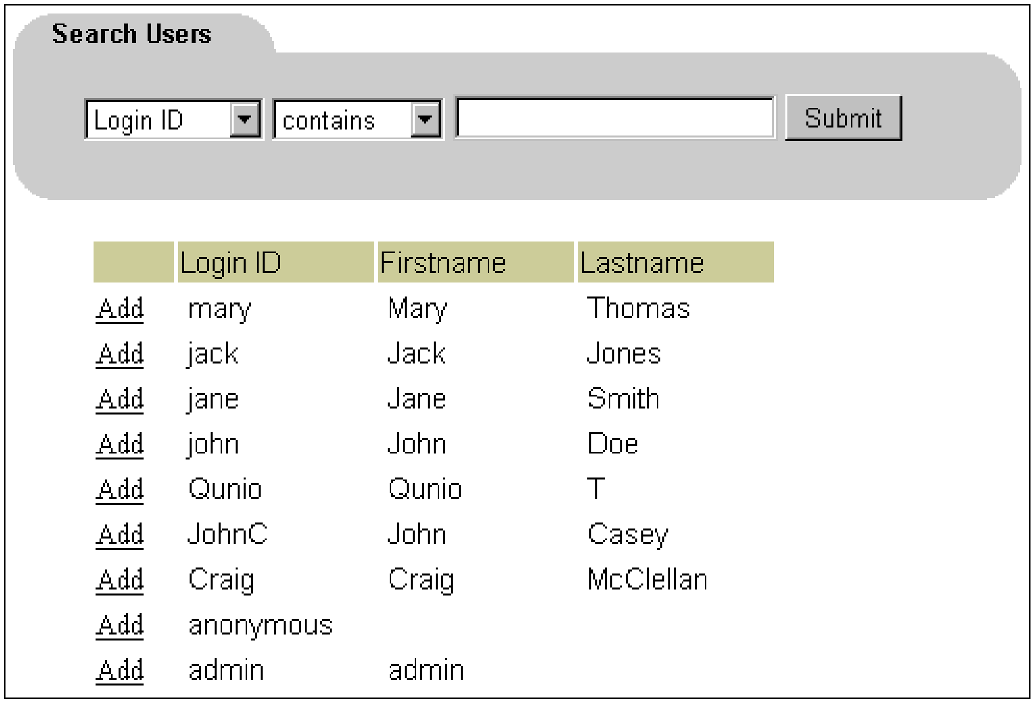
- The group name is added to the Members list for the new group.



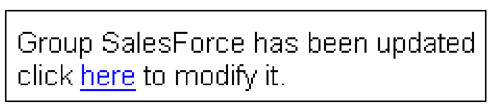
18. If you want to add one or more users to this new group, click on the Add button under Users.
    - The Search Users screen displays in a separate window:

19. Enter your search criteria.
20. Click on the Submit button.

- The search results display:



21. Click on the Add link for each user you want to add.
22. Click on the close box to close the Search Users window.
    - The user name is added to the Members list for the new group.
23. Click on the Save button.
    - A confirmation message displays.



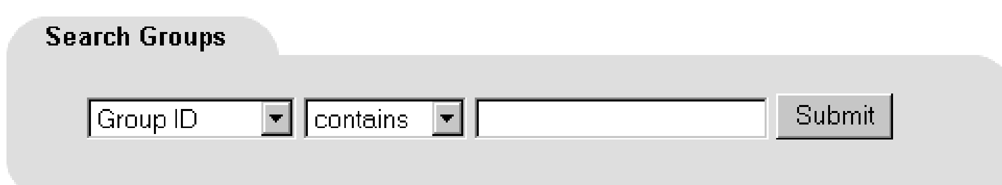
    - Use the "click here to modify it" link to edit the group you just created.

Finding a Group

This procedure locates a group in the system.

1. In the Side Navigation Bar, click on the Group menu triangle to expand it. .

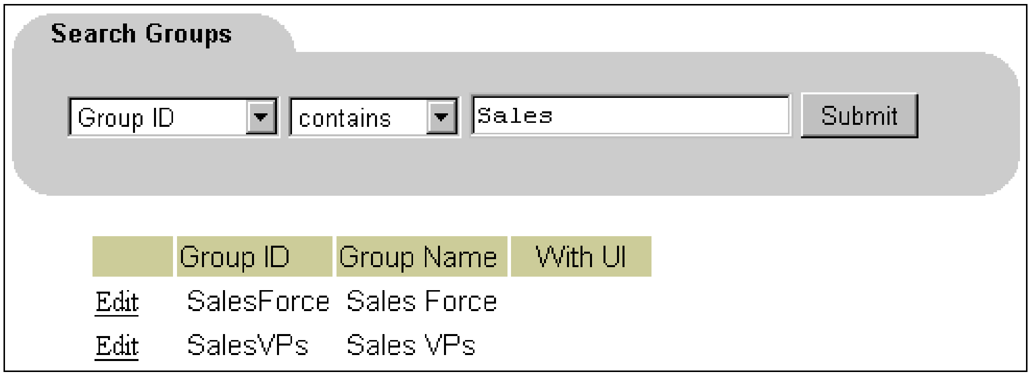
2. Click on the Find/Edit link.
    - The Search Groups screen displays:



3. Enter your search criteria.

- Clicking on the Submit button, without selecting anything, returns all users in the system.
- Searches can be created for Login ID, First name, Last name, or Full name.
- The following operators are available: contains, begins with, equals.
- Wildcards are allowed in the text box. For example, a search on "Smi?" will return users with names such as Smith or Smithson. An asterisk (*) alone entered into the text box returns all users in the system.

4. Click on the Submit button.
   - The search results display:

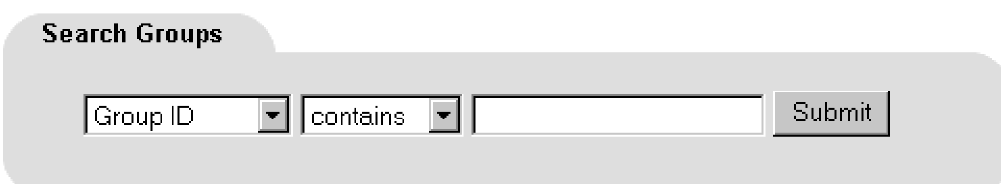


Editing a Group

This procedure modifies the information for an existing Group.

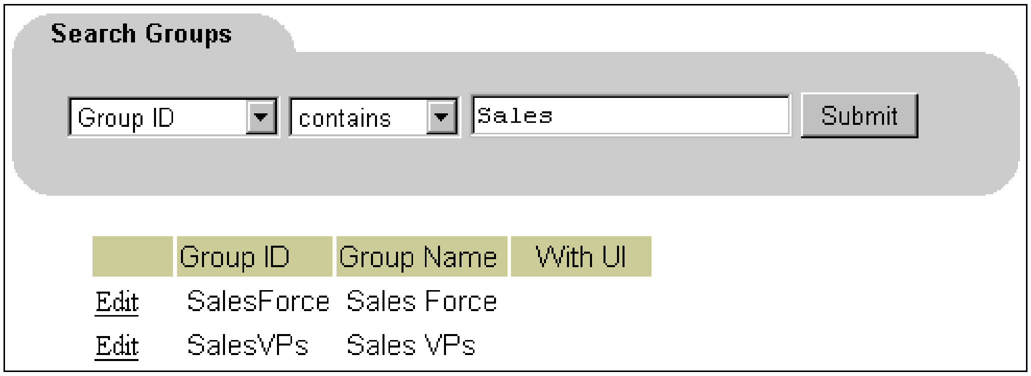
1. In the Side Navigation Bar, click on the Group menu triangle to expand it. .

2. Click on the Find/Edit link.
   - The Search Users screen displays:



3. Enter your search criteria.
   - Clicking on the Submit button, without selecting anything, returns all users in the system.
   - Searches can be created for Login ID, First name, Last name, or Full name.
   - The following operators are available: contains, begins with, equals.
   - Wildcards are allowed in the text box. For example, a search on "Smi?" will return users with names such as Smith or Smithson. An asterisk (*) alone entered into the text box returns all users in the system.
4. Click on the Submit button.

- The search results display:



5. Click on the Edit link for the group you want to modify.
   - The Group screen displays:

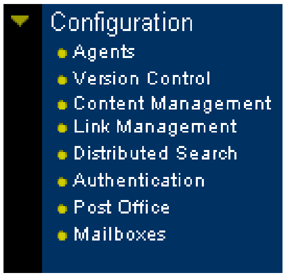
6. Click on the appropriate tab to go to the field(s) you want to change.
7. Make the appropriate changes.
8. Click on the Save button.

Modifying the Portal Agent Configuration

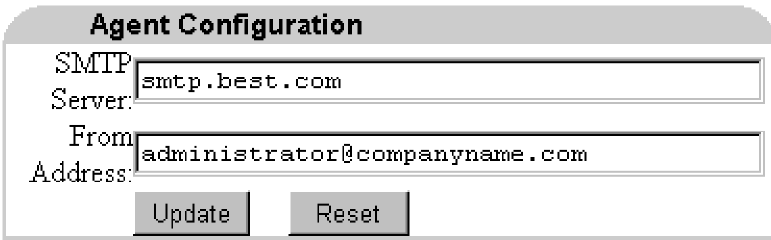
This procedure changes the SMTP address of the local email server used by the Agents function to send notifications. Without correct configuration, the Agents function will not work.

- The SMTP address is ususally added during the installation of the InfoPortal product.

1. In the Side Navigation Bar, click on the Configuration menu triangle to expand it.



2. Click on the Agents link.
   - The Agent Configuration screen displays:

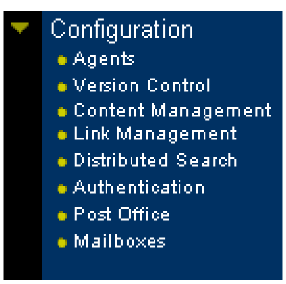


3. Click in the text box of the field you want to change.
4. Make the appropriate changes.
   - Click on the Reset button if you want to revert to the previous information.
5. Click on the Update button.
6. Stop and restart. See “Stopping and Starting Web Servers,” page 4.64.

Setting the Version Repository Directory

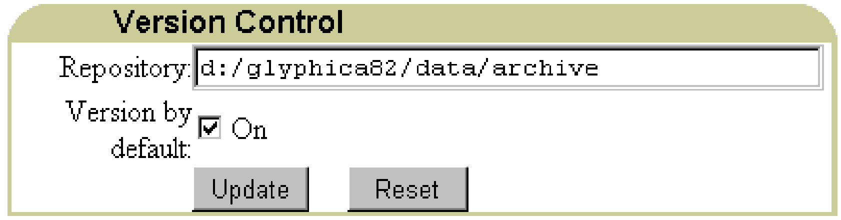
Use this procedure to configure the location of archived (versioned) files. This does NOT change the repository of the actual documents in the system—these stay in the main content area of the InfoPortal. However, the archived versions of those documents are stored separately in this Repository Directory.

1. In the Side Navigation Bar, click on the Configuration menu triangle to expand it.



2. Click on the Version Control link.

- The Version Control screen displays:

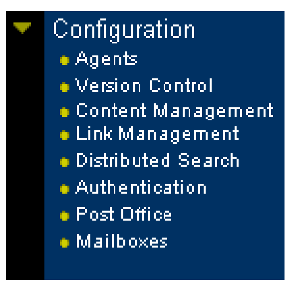


3. Make the appropriate changes.
   - Click on the Reset button if you want to revert to the previous information.
4. Click on the Update button.
5. Stop and restart. See “Stopping and Starting Web Servers,” page 4.64.

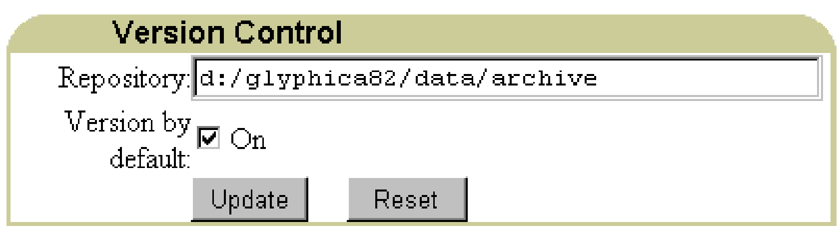
Configuring Versions by Default

Use this procedure to tell InfoPortal whether or not to automatically place all documents in the system under version history control. If this is set to On, any information uploaded to the Portal will be placed under version history control, meaning that duplicate copies of a document uploaded to the same category in which it already exists will generate an archive version, rather than overwrite the document in the system. Likewise, checking in documents will create archive versions. For a more thorough description of version history control, please see “Viewing Document Version History,” page 3.60.

1. In the Side Navigation Bar, click on the Configuration menu triangle to expand it.



2. Click on the Version Control link.
   - The Version Control screen displays:

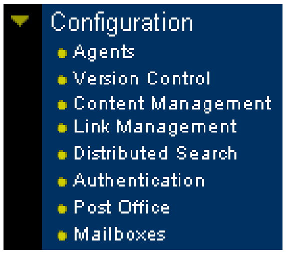


3. Click in the Version by default field to change it.
   - Click on the Reset button if you want to revert to the previous information.
4. Click on the Update button.
5. Stop and restart 4.64.

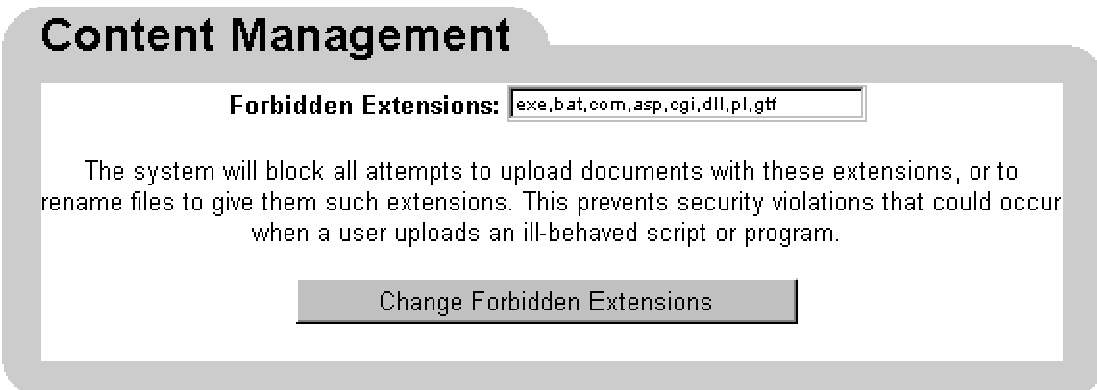
Setting Forbidden File Extensions

This procedure sets the file extensions that the system will block when users attemt to upload documents with these extensions, or rename files to give them such extensions. This prevents security violations that could occur when a user uploads an ill-behaved script or program.

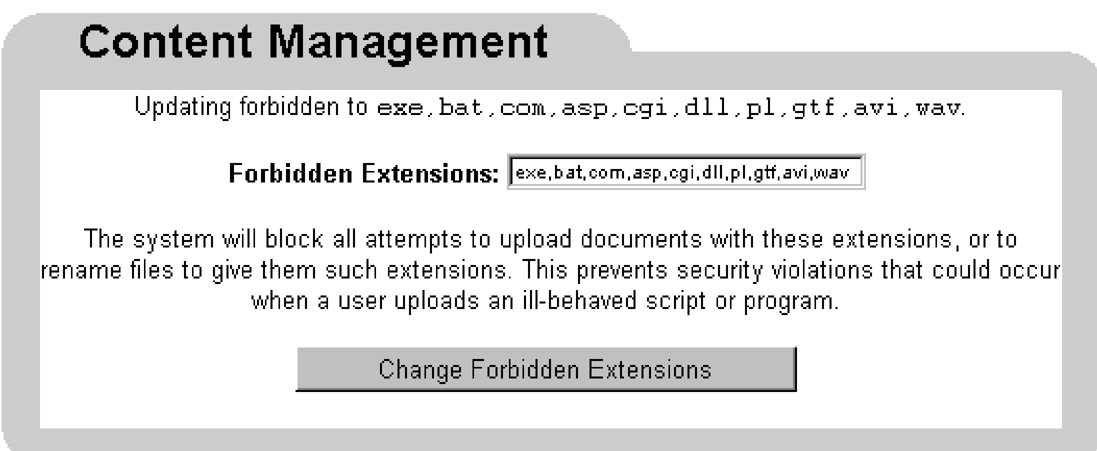
1. In the Side Navigation Bar, click on the Configuration menu triangle to expand it.



2. Click on the Content Management link.
   - The Content Management screen displays:



3. To add extensions, enter one or more extensions in the Forbidden Extensions field. Separate each extension with a comma but no spaces.
4. To delete an extension, highlight it and press the Delete key.
5. Click on the Change Forbidden Extensions button.
   - A confirmation message displays on the screen:

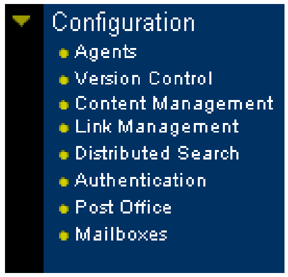


6. Stop and restart. See “Stopping and Starting Web Servers,” page 4.64.

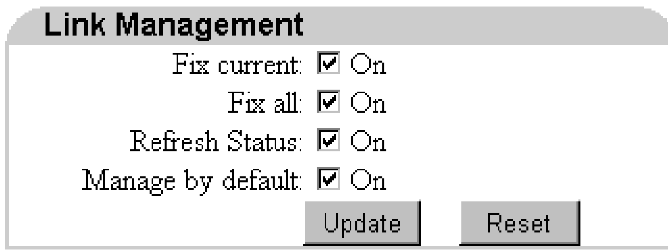
Configuring Link Hyper Management

This procedure manages the links leading into and out of PDF and HTML documents.

1. In the Side Navigation Bar, click on the Configuration menu triangle to expand it.



2. Click on the Link Management link.
   - The Link Management screen displays:

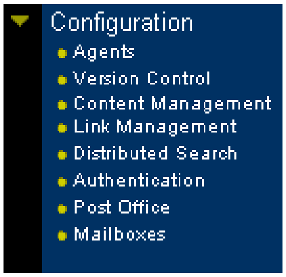


3. Click in the appropriate check boxes to make your changes.
   - **Fix current:** When you move a document, the links in that document will be updated so that any of them that were valid would still be valid.
   - **Fix all:** When you move a document, all of the valid links in it and the links in all of the documents that target it are updated to still be valid.
   - **Refresh Status:** Causes all other documents to correct their links in relation to added or copied documents. This option is checked by default.
   - **Manage by default:** Causes all copied and added documents to have their links validated as part of the add or copy process.
   - Click on the Reset button if you want to revert to the default setting before the update.
4. Click on the Update button.
5. Stop and restartthe server. See“Stopping and Starting Web Servers,” page 4.64.

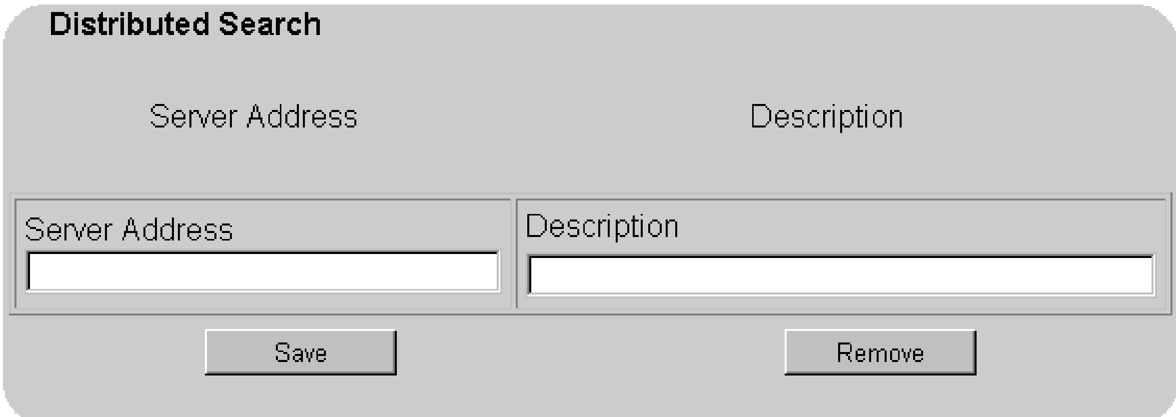
Creating a Distributed Search

Distributed Searches are a way of allowing several InfoPortals to "talk" to each other. Essentially, it is possible for one InfoPortal to query the repository of another InfoPortal. Any servers added here are available for query under the Search option.

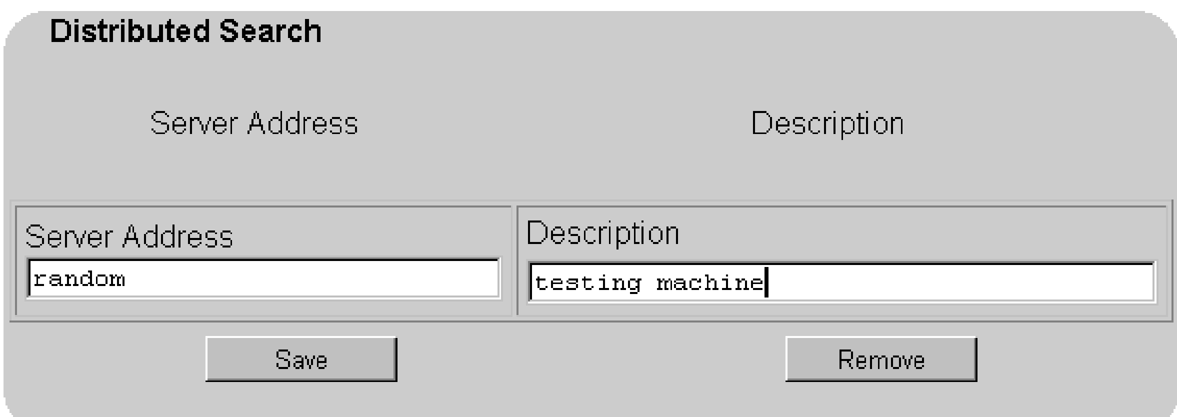
1. In the Side Navigation Bar, click on the Configuration menu triangle to expand it.



2. Click on the Distributed Search link. The Distributed Search screen displays:

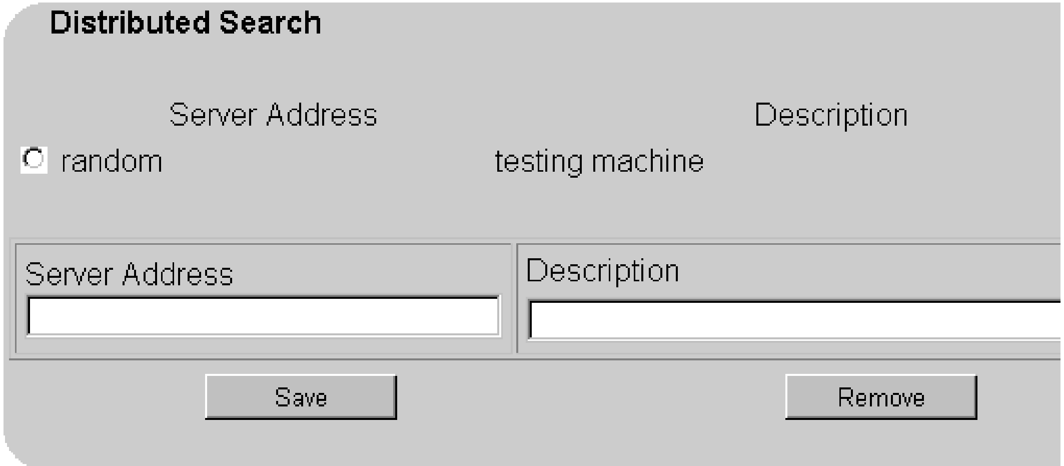


3. Click in the Server Address field.
4. Enter the address of the server on which distributed searches will take place.
   - This can be either a server name or it can be an IP address.
5. Press the Tab key.
6. Enter a brief description of the server (for example name, department, or location) in the Description field.
   - Here is an example with completed fields:



7. Click on the Save button.

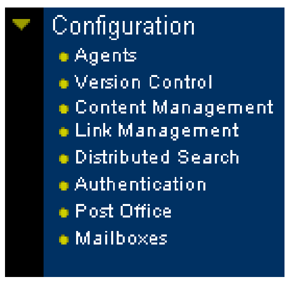
- The server address and description display in the table below:



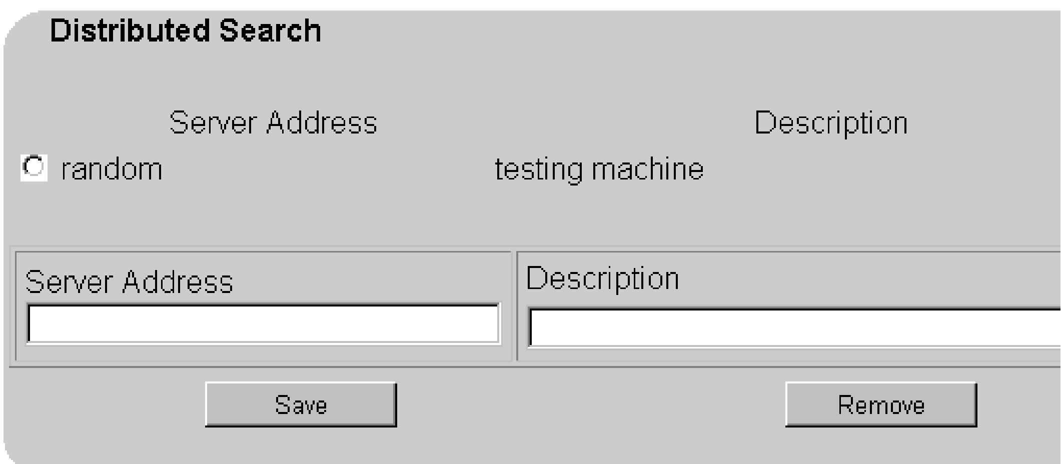
Modifying a Distributed Search

You can modify only the Description field. If you modify the server address information, the system will create a new entry in the table.

1. In the Side Navigation Bar, click on the Configuration menu triangle to expand it.

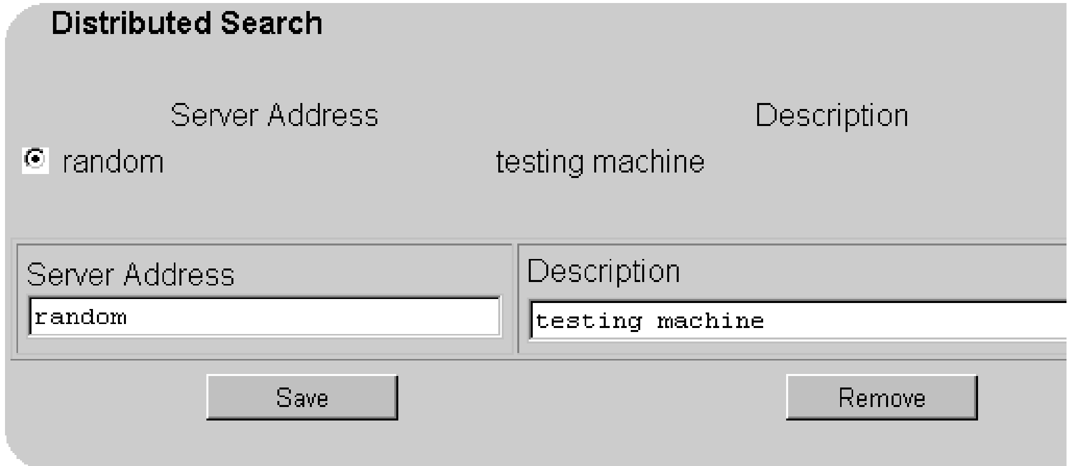


2. Click on the Distributed Search link.
   - The Distributed Search screen displays:



3. Click on the radio button to the left of the server information you want to change.

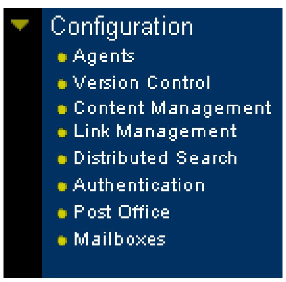
- The server address and description display in the fields at the bottom of the screen:



4. Make the appropriate changes to the Description field.
5. Click on the Save button.

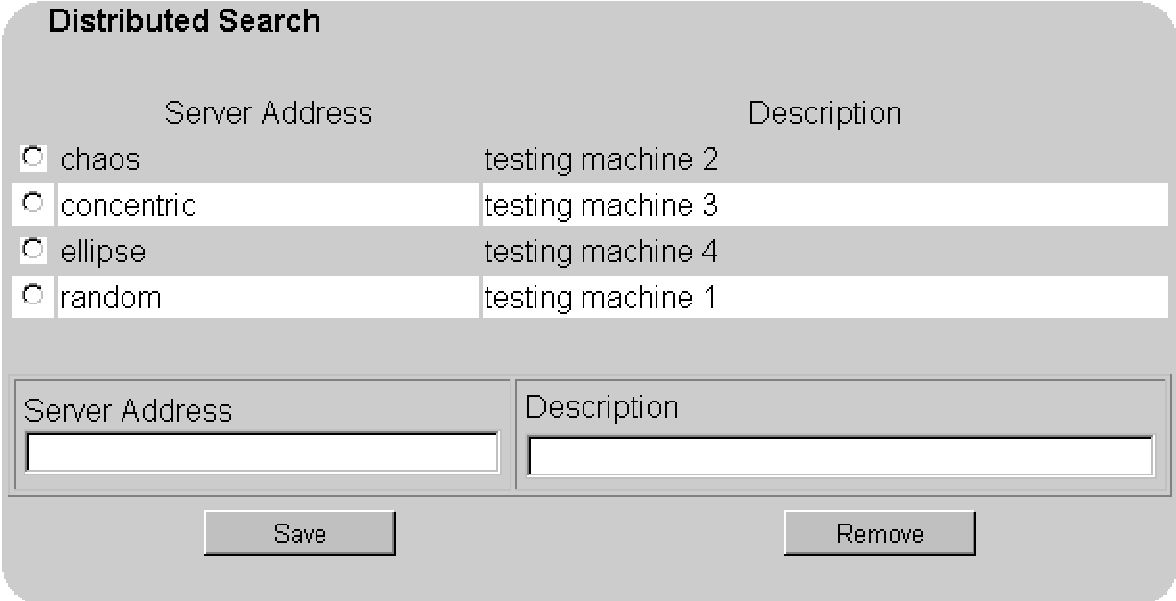
Deleting a Distributed Search

1. In the Side Navigation Bar, click on the Configuration menu triangle to expand it.

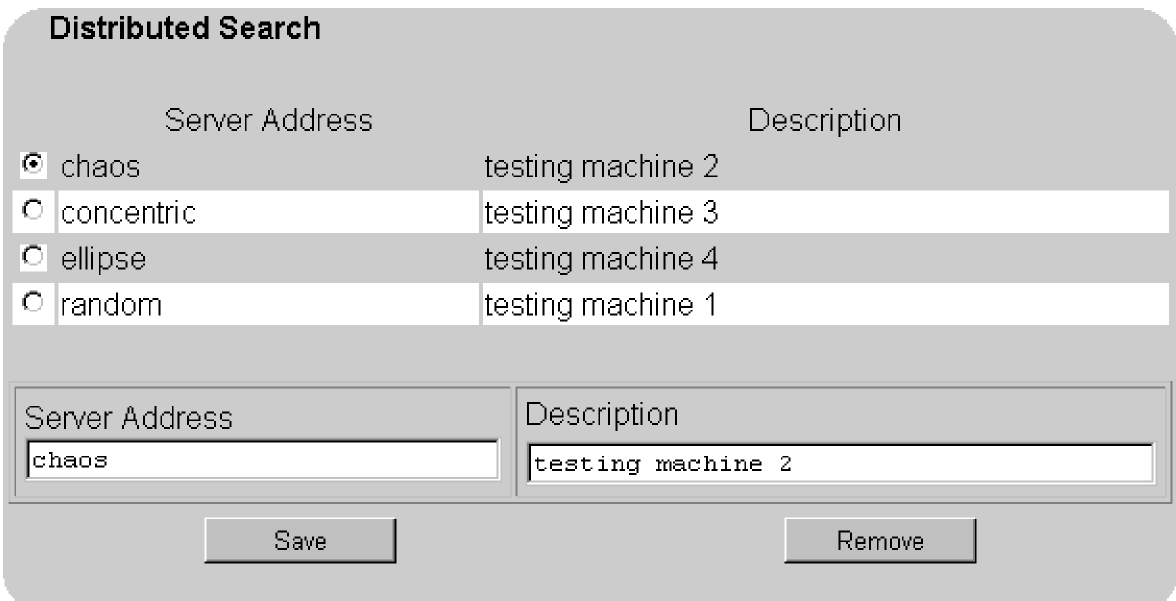


2. Click on the Distributed Search link.

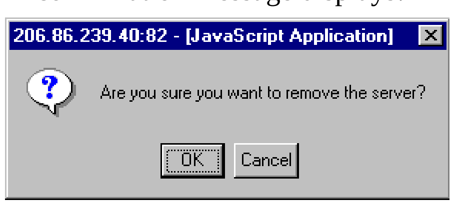
- The Distributed Search screen displays:



3. Click on the radio button to the left of the server address you want to delete.
    - The server address and description display in the fields at the bottom of the screen.

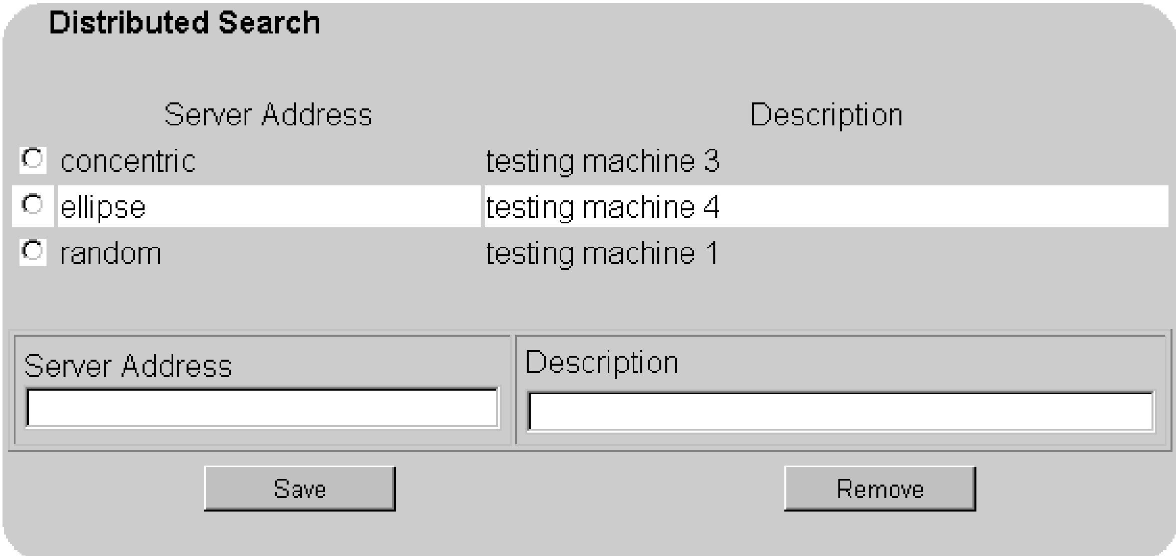


4. Click on the Remove button.
    - A confirmation message displays:



5. Click on the OK button.

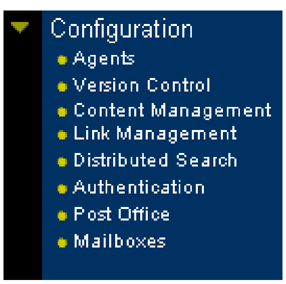
- The server information is removed from the table.



Configuring Authentication

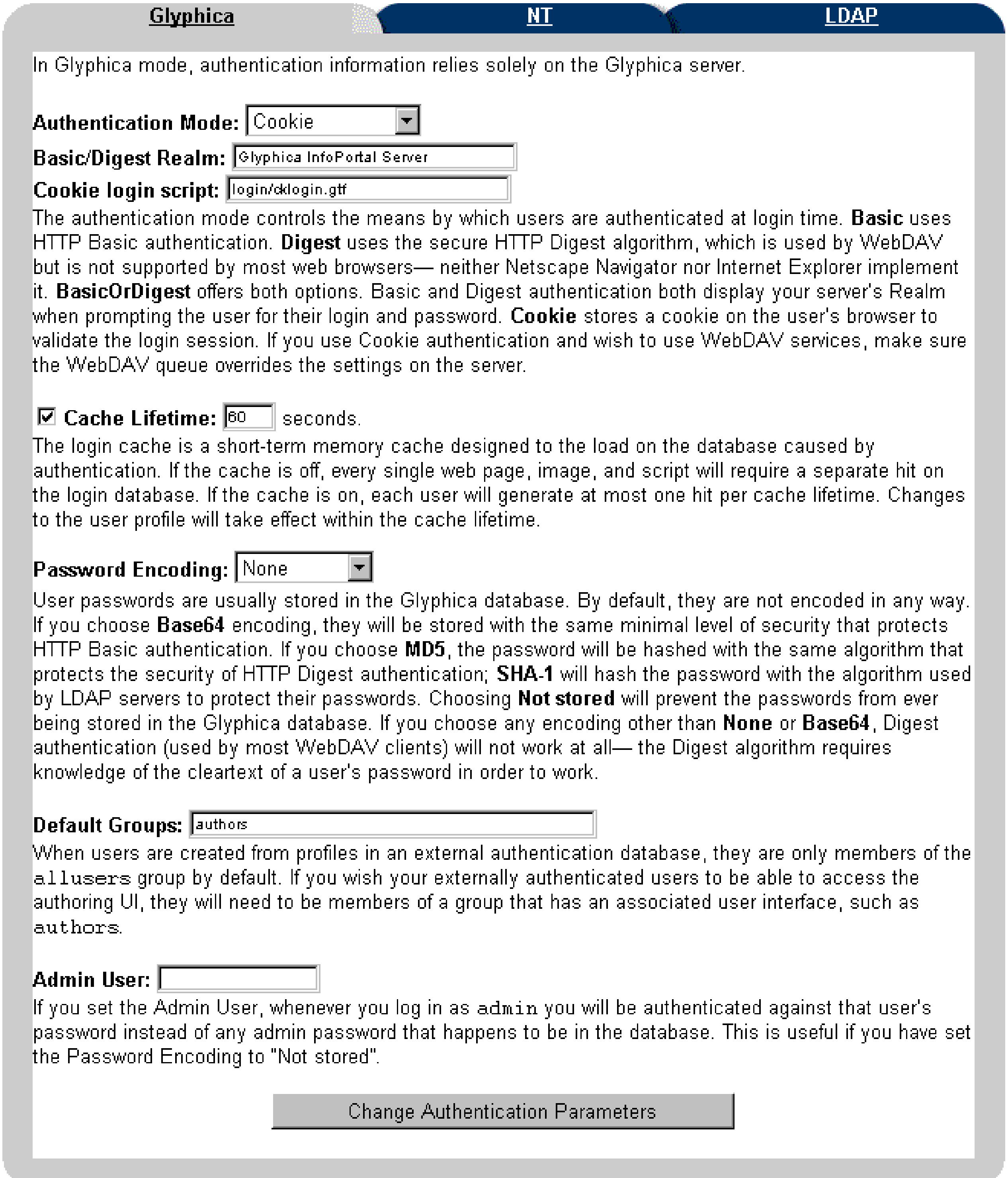
InfoPortal 3.0 is able to use industry-standard authentication methods to contoll access to the system Using NT or LDAP authentication instead of InfoPortals inherent system means that thier is no need for a redundant darabase of users. InfoPortal will ”check” a users login ID and password against an existing NT or LDAP database

1. In the Side Navigation Bar, click on the Configuration menu triangle to expand it.



2. Click on the Authentication link.
   - The Authentication screen displays. Three tabs display on this screen: Glyphica, NT, and LDAP. These are the three authentication methods available. See the figures and tables that follow for details on each screen. The general steps to follow are:
3. Click on the tab for the type of authentication you want to configure.
4. Follow the instructions on the screen for completing the fields.
5. Click on the Change Authentication Parameters button at the bottom of the screen.
6. Stop and restart See“Stopping and Starting Web Servers,” page 4.64.

- The initial screen displays the default Glyphica server configuration:



Glyphica | NT | LDAP

In Glyphica mode, authentication information relies solely on the Glyphica server.

Authentication Mode: Cookie

Basic/Digest Realm: Glyphica InfoPortal Server

Cookie login script: login/cklogin.gtf

The authentication mode controls the means by which users are authenticated at login time. **Basic** uses HTTP Basic authentication. **Digest** uses the secure HTTP Digest algorithm, which is used by WebDAV but is not supported by most web browsers— neither Netscape Navigator nor Internet Explorer implement it. **BasicOrDigest** offers both options. Basic and Digest authentication both display your server's Realm when prompting the user for their login and password. **Cookie** stores a cookie on the user's browser to validate the login session. If you use Cookie authentication and wish to use WebDAV services, make sure the WebDAV queue overrides the settings on the server.

☑ **Cache Lifetime:** 60 seconds.

The login cache is a short-term memory cache designed to the load on the database caused by authentication. If the cache is off, every single web page, image, and script will require a separate hit on the login database. If the cache is on, each user will generate at most one hit per cache lifetime. Changes to the user profile will take effect within the cache lifetime.

Password Encoding: None

User passwords are usually stored in the Glyphica database. By default, they are not encoded in any way. If you choose **Base64** encoding, they will be stored with the same minimal level of security that protects HTTP Basic authentication. If you choose **MD5**, the password will be hashed with the same algorithm that protects the security of HTTP Digest authentication; **SHA-1** will hash the password with the algorithm used by LDAP servers to protect their passwords. Choosing **Not stored** will prevent the passwords from ever being stored in the Glyphica database. If you choose any encoding other than **None** or **Base64**, Digest authentication (used by most WebDAV clients) will not work at all— the Digest algorithm requires knowledge of the cleartext of a user's password in order to work.

Default Groups: authors

When users are created from profiles in an external authentication database, they are only members of the `allusers` group by default. If you wish your externally authenticated users to be able to access the authoring UI, they will need to be members of a group that has an associated user interface, such as `authors`.

Admin User:

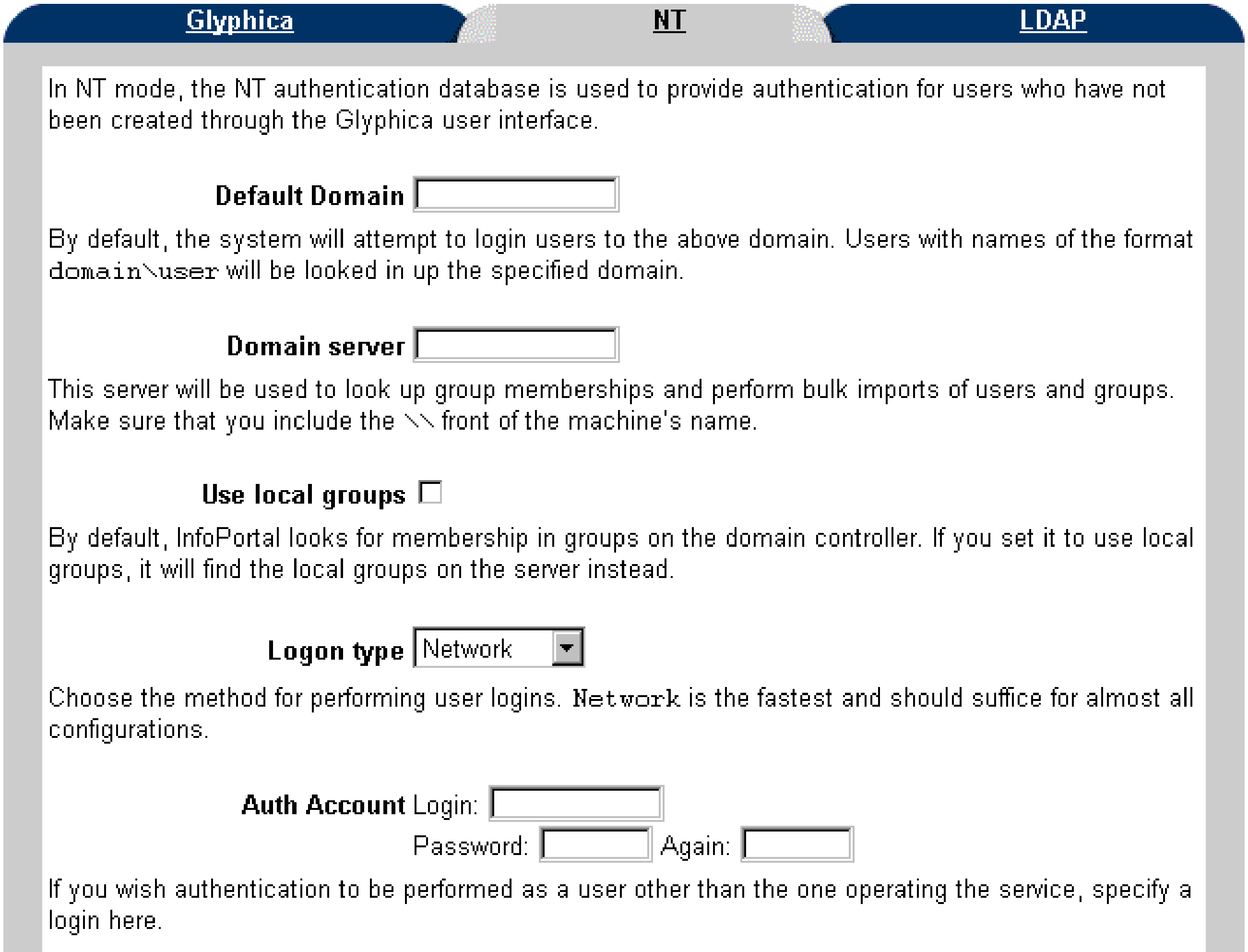
If you set the Admin User, whenever you log in as `admin` you will be authenticated against that user's password instead of any admin password that happens to be in the database. This is useful if you have set the Password Encoding to "Not stored".

Change Authentication Parameters

- In the Glypica authentation mode, authentication is performed by Glyphica's Versant database. The following table describes the fields in this screen.

Field Name	Description
Authentication Mode	Allows the Site Administrator to determine how user passwords are stored and transmitted to the server during a user's browser session. InfoPortal curently supports Cookie, Basic, Digest, and BasicOrDigest Authentication Modes. **Cookie** stores a cookie on the user's browser to validate the login session. If you use Cookie authentication and wish to use WebDAV services, make sure the WebDAV queue overrides the settings on the server. **Basic** uses HTTP Basic authentication. **Digest** uses the secure HTTP Digest algorithm, which is used by WebDAV but is not supported by most web browsers— neither Netscape Navigator nor Internet Explorer implement it. **BasicOrDigest** offers both options. Basic and Digest authentication both display your server's Realm when prompting the user for their login and password.
Basic/Digest Realm	Displays the server's name when prompting the user for their login and password.
Cookie Login Script	Displays the filename of the cookie that is stored on the user's browser to validate the login session.
Cache Lifetime	Indicates how long a permission query lasts before the permission stored in your browser for the current session is resubmitted to the server for authentication.
Password Encoding	Allows variable encryption methods with which to store passwords in the database. Glyphica allows None, Base64, SHA-1, and MD5.
Default Groups	Indicates the initial group to which the users belong. If this group does not have a user interface associated with it, it will be difficult for users to log in.
Admin User	Allows the Site Administrator to be authenticated by a different account when loggin in as admin. This is especially useful when using the not Stored password encoding available with all other authentication types.

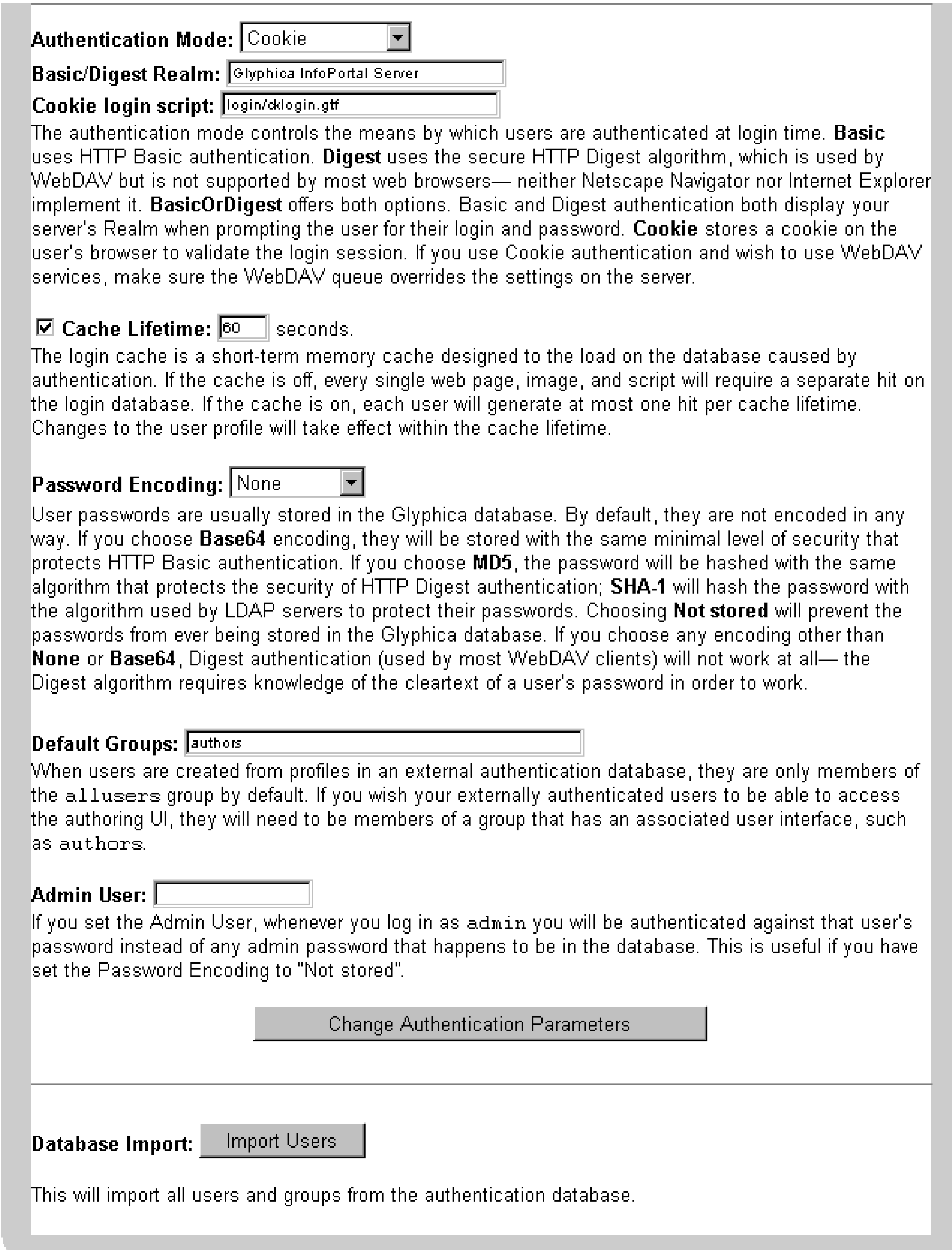
- Due to the length of the NT server configuration screen, it is shown here in two parts:



- The following table describes the fields in this part of the screen:

Field Name	Description
Default Domain	Indicates the domain to which the users using this authentication method will be logging in.
Domain Server	Indicates the actual location from which InfoPortal will receive authentication if this method is chosen.
Use Local Groups	Tells InfoPortal to look for membership in groups based on the local groups on the server, rather than on the domain controller.
Logon Type	Indicates the method for performing user logins. Although Network is the fastest and should suffice for almost all configurations, InfoPortal also allows Interactive, Batch and Service methods. We need descriptions for these four methods.
Auth Account	Indicates the user ID and password for performing authentication as a user other than the one operating the service.

- NT server configuration screen, part two:



Authentication Mode: Cookie

Basic/Digest Realm: Glyphica InfoPortal Server

Cookie login script: login/cklogin.gtf

The authentication mode controls the means by which users are authenticated at login time. **Basic** uses HTTP Basic authentication. **Digest** uses the secure HTTP Digest algorithm, which is used by WebDAV but is not supported by most web browsers— neither Netscape Navigator nor Internet Explorer implement it. **BasicOrDigest** offers both options. Basic and Digest authentication both display your server's Realm when prompting the user for their login and password. **Cookie** stores a cookie on the user's browser to validate the login session. If you use Cookie authentication and wish to use WebDAV services, make sure the WebDAV queue overrides the settings on the server.

☑ **Cache Lifetime:** 60 seconds.

The login cache is a short-term memory cache designed to the load on the database caused by authentication. If the cache is off, every single web page, image, and script will require a separate hit on the login database. If the cache is on, each user will generate at most one hit per cache lifetime. Changes to the user profile will take effect within the cache lifetime.

Password Encoding: None

User passwords are usually stored in the Glyphica database. By default, they are not encoded in any way. If you choose **Base64** encoding, they will be stored with the same minimal level of security that protects HTTP Basic authentication. If you choose **MD5**, the password will be hashed with the same algorithm that protects the security of HTTP Digest authentication; **SHA-1** will hash the password with the algorithm used by LDAP servers to protect their passwords. Choosing **Not stored** will prevent the passwords from ever being stored in the Glyphica database. If you choose any encoding other than **None** or **Base64**, Digest authentication (used by most WebDAV clients) will not work at all— the Digest algorithm requires knowledge of the cleartext of a user's password in order to work.

Default Groups: authors

When users are created from profiles in an external authentication database, they are only members of the `allusers` group by default. If you wish your externally authenticated users to be able to access the authoring UI, they will need to be members of a group that has an associated user interface, such as `authors`.

Admin User:

If you set the Admin User, whenever you log in as `admin` you will be authenticated against that user's password instead of any admin password that happens to be in the database. This is useful if you have set the Password Encoding to "Not stored".

Change Authentication Parameters

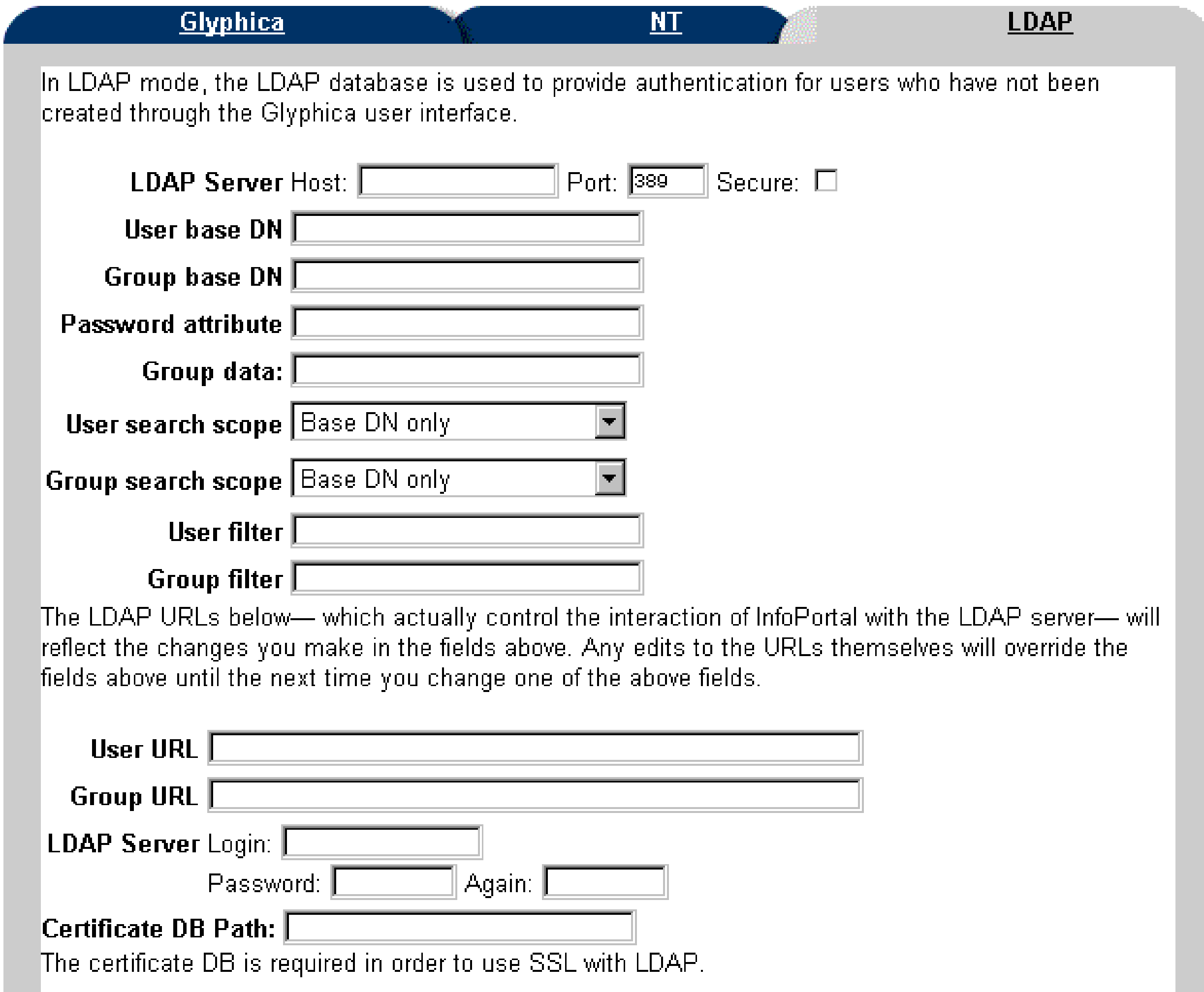
Database Import: Import Users

This will import all users and groups from the authentication database.

- The following table describes the fields in this part of the screen:

Field Name	Description
Authentication Mode	Allows the Site Administrator to determine how user passwords are stored and transmitted to the server during a user's browser session. InfoPortal curently supports Cookie, Basic, Digest, and BasicOrDigest Authentication Modes. **Cookie** stores a cookie on the user's browser to validate the login session. If you use Cookie authentication and wish to use WebDAV services, make sure the WebDAV queue overrides the settings on the server. **Basic** uses HTTP Basic authentication. **Digest** uses the secure HTTP Digest algorithm, which is used by WebDAV but is not supported by most web browsers— neither Netscape Navigator nor Internet Explorer implement it. **BasicOrDigest** offers both options. Basic and Digest authentication both display your server's Realm when prompting the user for their login and password.
Basic/Digest Realm	Displays the server's name when prompting the user for their login and password.
Cookie Login Script	Displays the filename of the cookie that is stored on the user's browser to validate the login session.
Cache Lifetime	Indicates how long a permission query lasts before the permission stored in your browser for the current session is resubmitted to the server for authentication.
Password Encoding	Allows variable encryption methods with which to store passwords in the database. Glyphica allows None, Base64, SHA-1, and MD5.
Default Groups	Indicates the initial group to which the users belong. If this group does not have a user interface associated with it, it will be difficult for users to log in.
Admin User	Allows the Site Administrator to be authenticated by a different account when loggin in as admin. This is especially useful when using the Note Stored password encoding available with all other authentication types.
Database Import	Imports all users from the authentication database.

- Due to the length of the LDAP configuration screen, it is shown here in two parts:

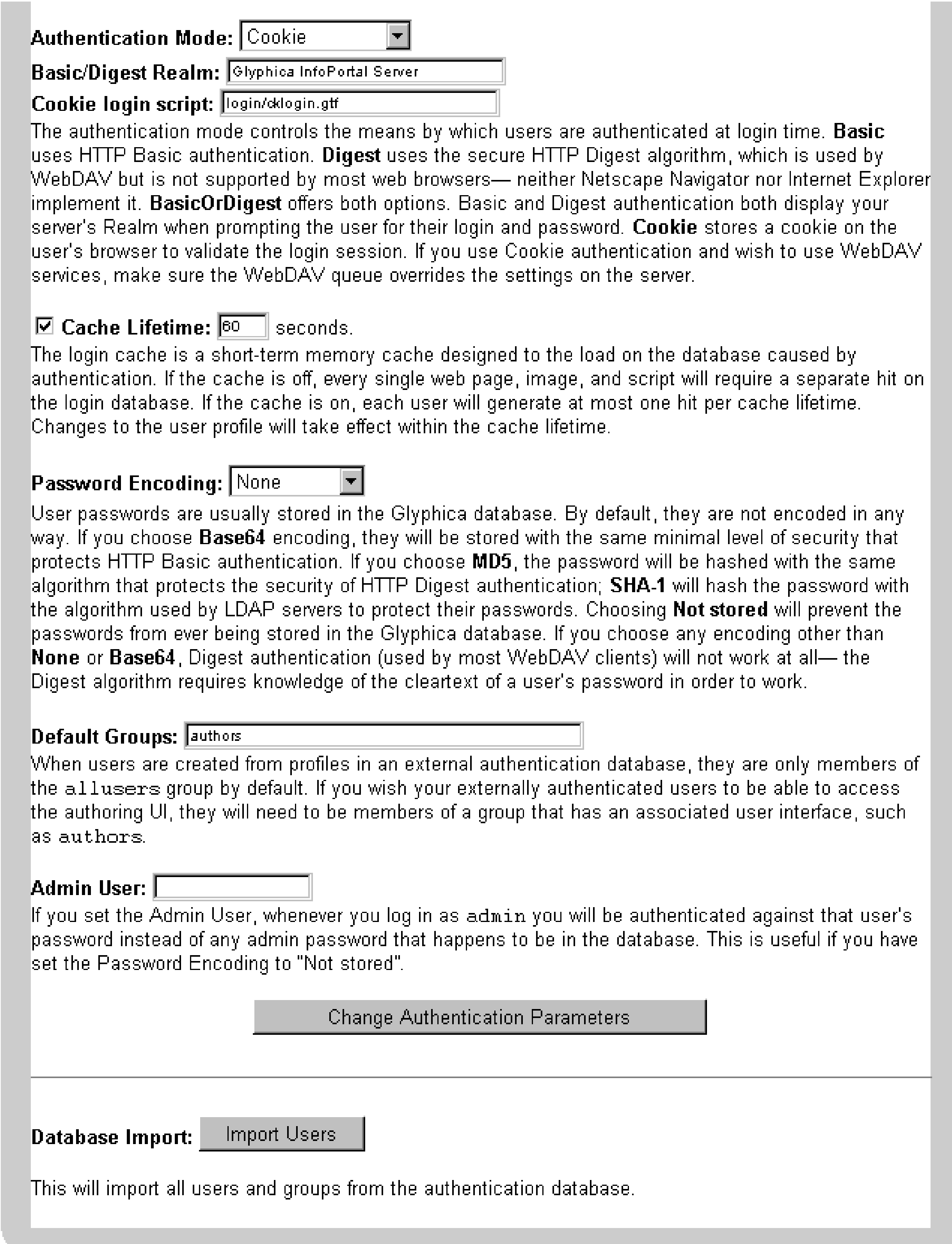


- The following table describes the fields in this part of the screen:

Field Name	Description
LDAP Server	Indicates the machine on which the LDAP server is located. The port number is the port to which the LDAP server is installed.
User Base DN	Indicates the Distinguished Name of the user base, where InfoPortal searches for user information from the LDAP server.
Group Base DN	Indicates the Distinguished Name of the group base, where InfoPortal searches for group information from the LDAP server.
Password Attribute	Indicates the variable set for the category password in the LDAP server.
Group Data	Comma separated list of data fields to pull from the LDSP group info.
User Search Scope	Indicates the breadth of InfoPortal's search for a user in the LDAP directory. Options are Base DN only, one level down, and anywhere under Base DN.
Group Search Scope	Indicates the breadth of InfoPortal's search for a group in the LDAP directory. Options are Base DN only, one level down, and anywhere under Base DN.

Field Name	Description
User Filter	Limits searches for specific users within the LDAP directory.
Group Filter	Limits searches for specific groups within the LDAP directory.
User URL	Lets Site Administrators edit the user URL; this will override the fields above until the next time one of the above fields is changed.
Group URL	Lets Site Administrators edit the group URL; this will override the fields above until the next time one of the above fields is changed.
LDAP Server	Indicates the administrator account of the LDAP directory that gives InfoPortal permission to access the directory.
Certificate DB Path	(Optional) If certificates have been enabled on the LDAP server, this indicates the path to the certificate database.

- LDAP configuration screen, part two:



Authentication Mode: Cookie

Basic/Digest Realm: Glyphica InfoPortal Server

Cookie login script: login/cklogin.gtf

The authentication mode controls the means by which users are authenticated at login time. **Basic** uses HTTP Basic authentication. **Digest** uses the secure HTTP Digest algorithm, which is used by WebDAV but is not supported by most web browsers— neither Netscape Navigator nor Internet Explorer implement it. **BasicOrDigest** offers both options. Basic and Digest authentication both display your server's Realm when prompting the user for their login and password. **Cookie** stores a cookie on the user's browser to validate the login session. If you use Cookie authentication and wish to use WebDAV services, make sure the WebDAV queue overrides the settings on the server.

☑ **Cache Lifetime:** 60 seconds.

The login cache is a short-term memory cache designed to the load on the database caused by authentication. If the cache is off, every single web page, image, and script will require a separate hit on the login database. If the cache is on, each user will generate at most one hit per cache lifetime. Changes to the user profile will take effect within the cache lifetime.

Password Encoding: None

User passwords are usually stored in the Glyphica database. By default, they are not encoded in any way. If you choose **Base64** encoding, they will be stored with the same minimal level of security that protects HTTP Basic authentication. If you choose **MD5**, the password will be hashed with the same algorithm that protects the security of HTTP Digest authentication; **SHA-1** will hash the password with the algorithm used by LDAP servers to protect their passwords. Choosing **Not stored** will prevent the passwords from ever being stored in the Glyphica database. If you choose any encoding other than **None** or **Base64**, Digest authentication (used by most WebDAV clients) will not work at all— the Digest algorithm requires knowledge of the cleartext of a user's password in order to work.

Default Groups: authors

When users are created from profiles in an external authentication database, they are only members of the `allusers` group by default. If you wish your externally authenticated users to be able to access the authoring UI, they will need to be members of a group that has an associated user interface, such as `authors`.

Admin User:

If you set the Admin User, whenever you log in as `admin` you will be authenticated against that user's password instead of any admin password that happens to be in the database. This is useful if you have set the Password Encoding to "Not stored".

Change Authentication Parameters

Database Import: Import Users

This will import all users and groups from the authentication database.

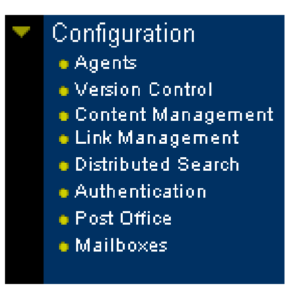
- The following table describes the fields in this part of the screen:

Field Name	Description
Authentication Mode	Allows the Site Administrator to determine how user passwords are stored and transmitted to the server during a user's browser session. InfoPortal curently supports Cookie, Basic, Digest, and BasicOrDigest Authentication Modes. **Cookie** stores a cookie on the user's browser to validate the login session. If you use Cookie authentication and wish to use WebDAV services, make sure the WebDAV queue overrides the settings on the server. **Basic** uses HTTP Basic authentication. **Digest** uses the secure HTTP Digest algorithm, which is used by WebDAV but is not supported by most web browsers— neither Netscape Navigator nor Internet Explorer implement it. **BasicOrDigest** offers both options. Basic and Digest authentication both display your server's Realm when prompting the user for their login and password.
Basic/Digest Realm	Displays the server's name when prompting the user for their login and password.
Cookie Login Script	Displays the filename of the cookie that is stored on the user's browser to validate the login session.
Cache Lifetime	Indicates how long a permission query lasts before the permission stored in your browser for the current session is resubmitted to the server for authentication.
Password Encoding	Allows variable encryption methods with which to store passwords in the database. Glyphica allows None, Base64, SHA-1, and MD5.
Default Groups	Indicates the initial group to which the users belong. If this group does not have a user interface associated with it, it will be difficult for users to log in.
Admin User	Allows the Site Administrator to be authenticated by a different account when loggin in as admin. This is especially useful when using the Note Stored password encoding available with all other authentication types.
Database Import	Imports all users from the authentication database.

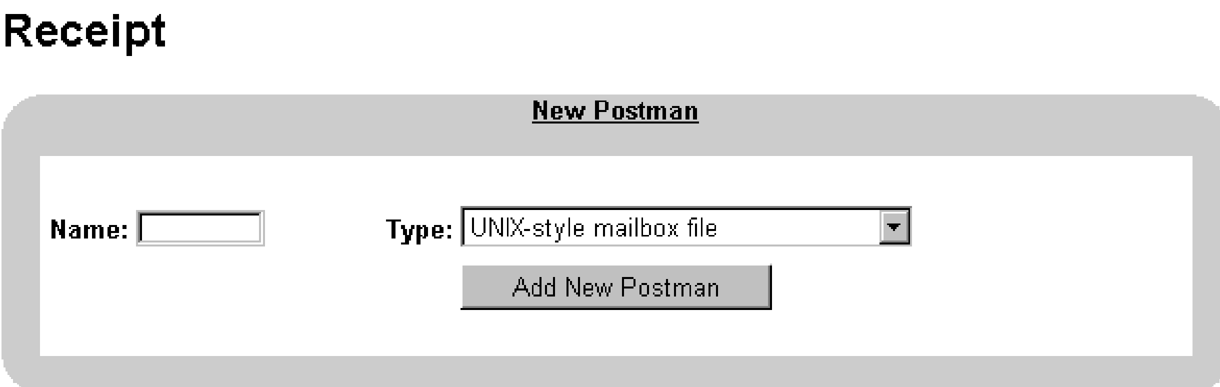
Creating and Changing the E-Mail Delivery Configuration

This procedure lets the Site Administrator set up and change the settings for the server email account.

1. In the Side Navigation Bar, click on the Configuration menu triangle to expand it.



2. Click on the Post Office link.
   - The E-Mail Delivery and Receipt screens display:



   - From Address: the address used if the email delivery system sends mail.
   - SMTP Server: the server that provides connectivity for mail sent by agents or account managers for extranets.
3. Enter the email account address to which mail will be delivered in the From Address field.
4. Enter the SMTP server address of your Internet Service Provider (ISP), or for your mail server if your company has an SMTP server in-house.
5. Click on the Change Delivery Information button.
   - A confirmation message displays:

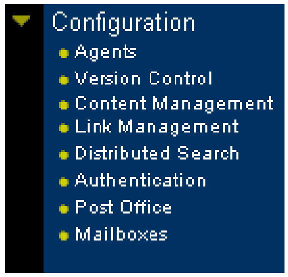
E-mail configuration updated. You must re-start the web server for your changes to take effect.

6. Stop and restart. See“Stopping and Starting Web Servers,” page 4.64.

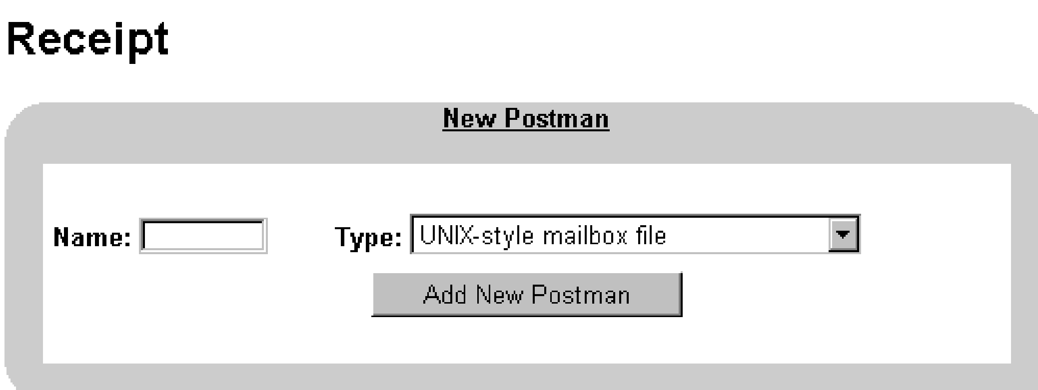
Creating or Adding a New Postman

A Postman represents a process that occurs on a regular basis to check a source of mail, such as a mail server, for new arrivals. When new mail has arrived, the Postman moves the mail from the incoming location to a designated incoming mailbox file.

1. In the Side Navigation Bar, click on the Configuration menu triangle to expand it.



2. Click on the Post Office link.
   - The E-Mail Delivery and Receipt screens display:

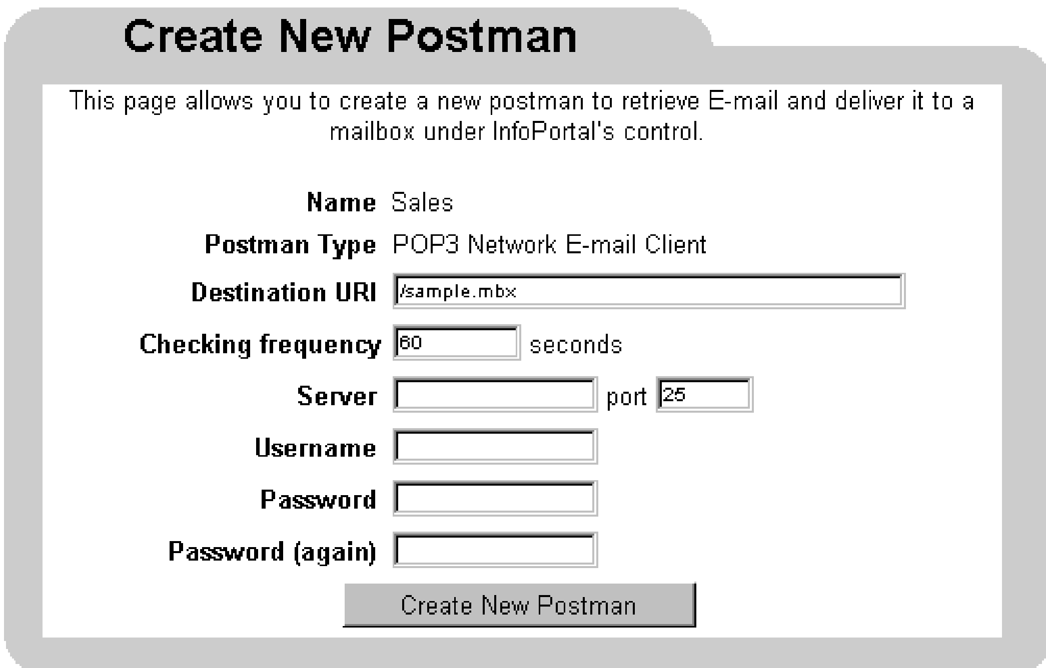


3. Enter the name of the Postman process in the Name text box.
   - This lets the Site Administrator give a descriptive label to the Postman, which helps in organizing the data output. (exapmle: “Salesmail”)
4. Select one of the mailbox types from the Type drop-down list.
   - This is the type of mailbox file from which InfoPortal retrieves mail. The following options are available:

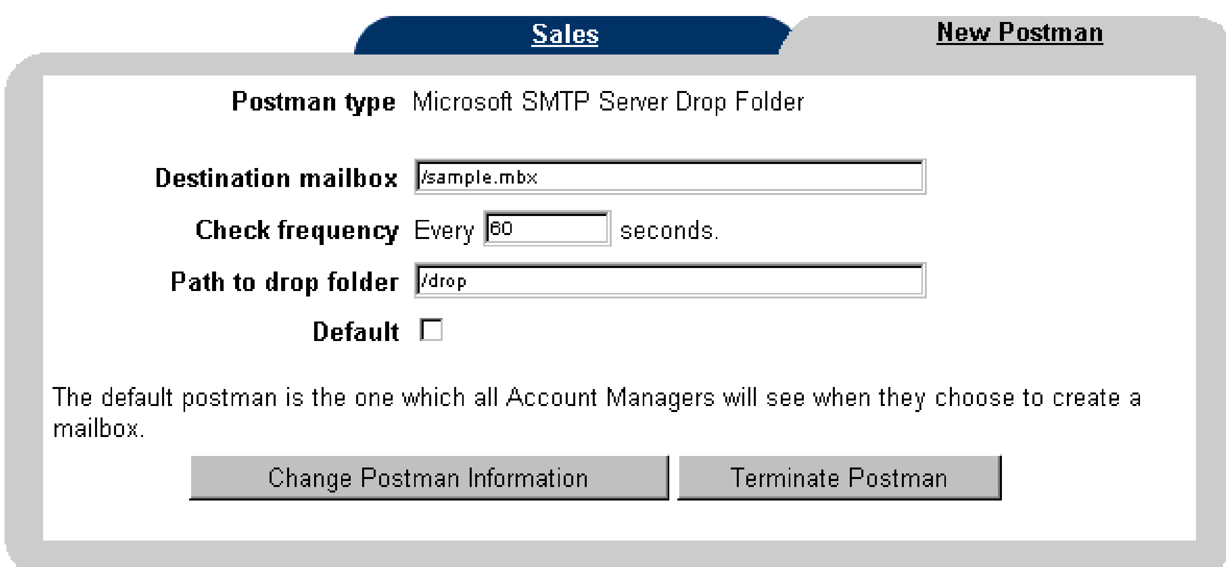
Type	Explanation
UNIX-style mailbox file	Style available on a standard Unix install that handles mail for the machine.

Type	Explanation
Microsoft SMTP Server Drop Folder	A server available with Microsoft Mail Server programs.
POP3 Network E-mail Client	A standard mail protocol type for many mail servers.

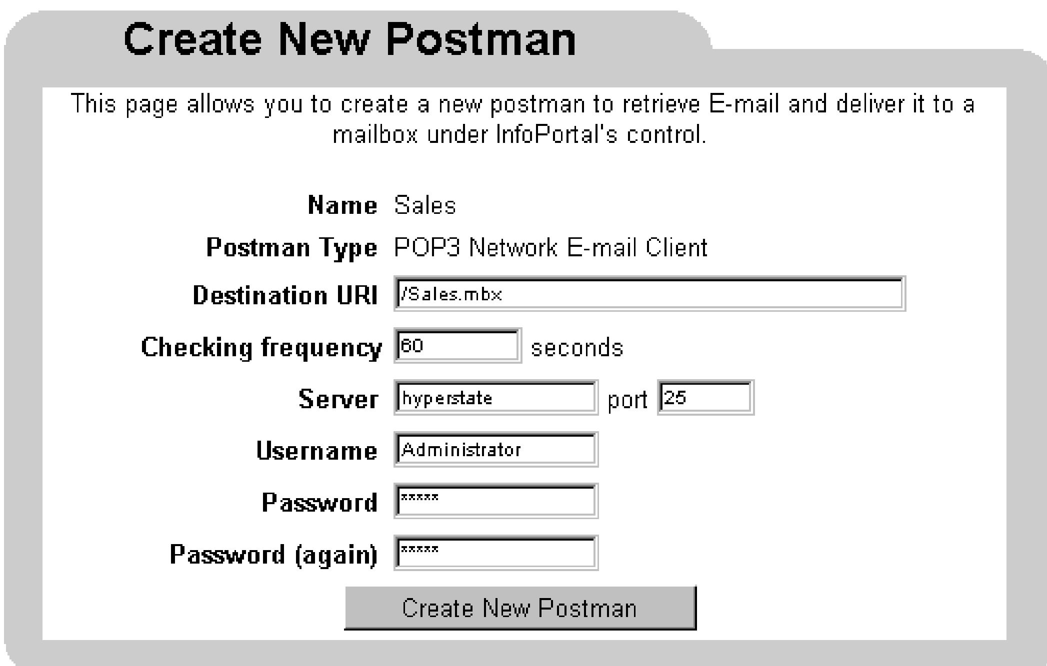
5. Click on the Add New Postman button.
   - The Create New Postman screen displays. The screem will vary depending on the Postman Type you've chosen. Here is the screen for a POP3 Network E-mail client:



   - Here is the Create New Postman screen for a Microsoft SMTP Server Drop Folder:



6. In the Destination URI field, enter the mailbox filename to which mail will be forwarded.
   - Make sure you include the slash (/) in the name. In addition, mailboxes *must* have the .mbx extension on the filename. All mailboxes are created under the InfoPortal doc root. You can specify different locations under the root by specifying the entire path. Example: /sales/correspsondence/salesmail.mbx
7. Change the checking frequency if desired.
   - The checking frequency is how often this postman will check the source of emails for new input.
8. If you are creating a Microsoft SMTP Server Drop Folder, enter the appropriate path in the Path to Drop Folder field. Otherwise, skip to Step 9.
   - This must be an absolute path on the file system of the host machine.
9. Enter the mail server hostname or IP address where the program receiving mail resides.
10. Change the Port number, if necessary.
11. Enter the username of the person who administrates this Postman process—that is, the account that has privileges to pick up this mail.
12. Enter the password for that username.
13. Enter the password a second time for confirmation.
    - The following figure shows an example of a completed screen for a POP3 Network E-mail Client Postman:



14. Click on the Create New Postman button.
    - A confirmation message displays:

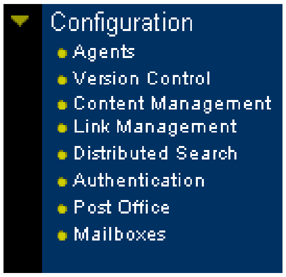
New POP3 Network E-mail Client postman 'Sales' created.
Pattern: POP3 name=Sales mbox=/Sales.mbx frequency=60 url=pop://Administrator@hyperstate password=admin

15. Stop and restart. See “Stopping and Starting an Internet Information Server (ISS) Running on Windows NT,” page 4.65.

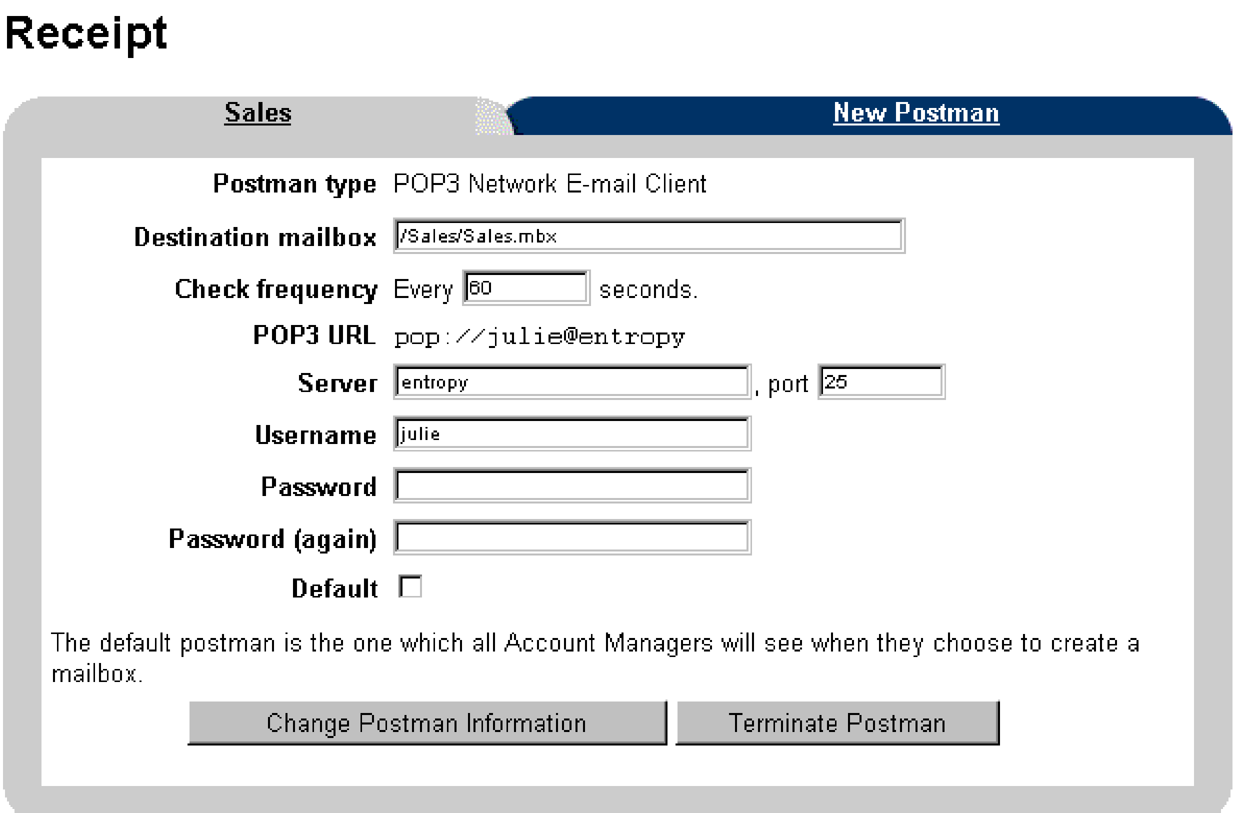
Changing Postman Information

This procedure modifies the settings for an existing Postman process.

1. In the Side Navigation Bar, click on the Configuration menu triangle to expand it.



2. Click on the Post Office link.
   - The E-mail Delivery and Receipt screen displays. The figure that follows shows only the Receipt screen:

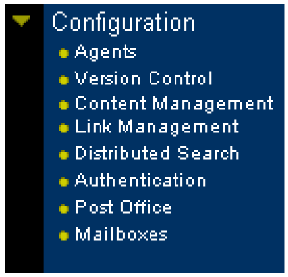


3. Click on the tab for the Postman process you wish to change.
   - The Postman configuration information displays.
4. Make the appropriate changes.
5. Click on the Change Postman Information button.
   - A confirmation message displays.
6. Restart the web server.

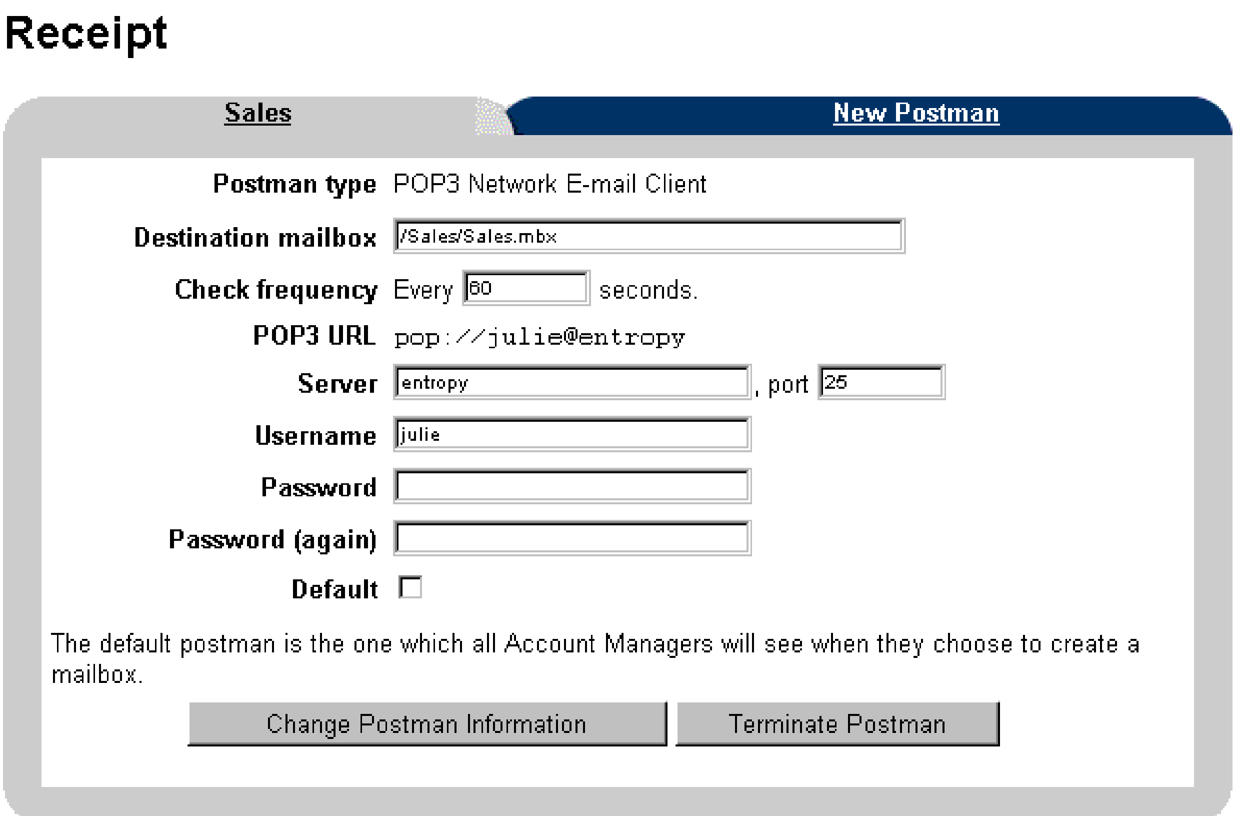
Deleting a Postman

This procedure deletes an existing Postman process from the system.

1. In the Side Navigation Bar, click on the Configuration menu triangle to expand it.



2. Click on the Post Office link.
   - The E-mail Delivery and Receipt screen displays. The figure that follows shows only the Receipt screen:



3. Click on the tab for the Postman process you wish to delete.
   - The Postman configuration information displays.
4. Click on the Terminate Postman button.
   - A confirmation message displays:

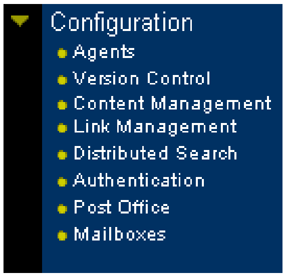
Postman Sales removed.
You must re-start the web server for your changes to take effect.

5. Stop and restart 4.64.

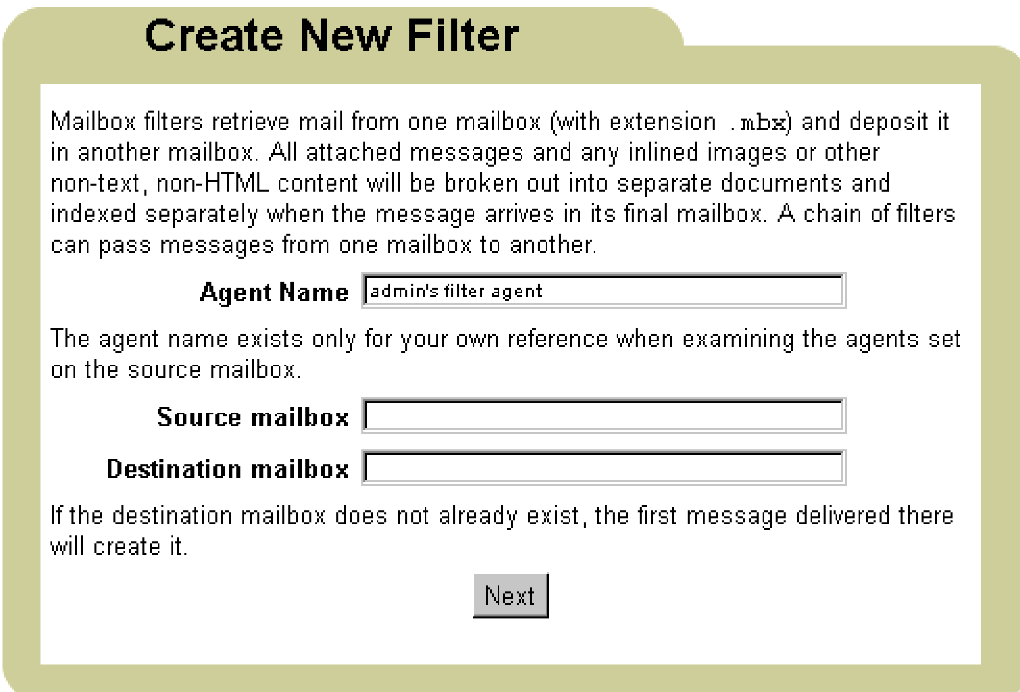
Creating a Mailbox Filter

This procedure creates a mailbox filter to forward mail, if the filter criteria you configure here are met, from one mailbox to another mailbox.

1. In the Side Navigation Bar, click on the Configuration menu triangle to expand it.

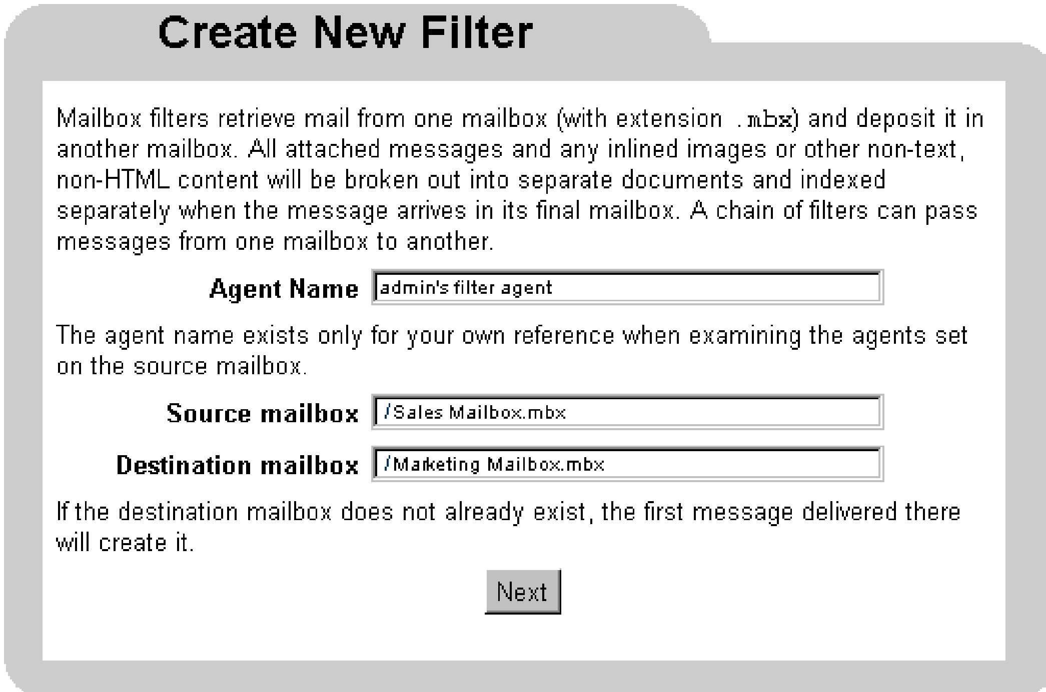


2. Click on the Mailboxes link.
   - The Create New Filter screen displays:



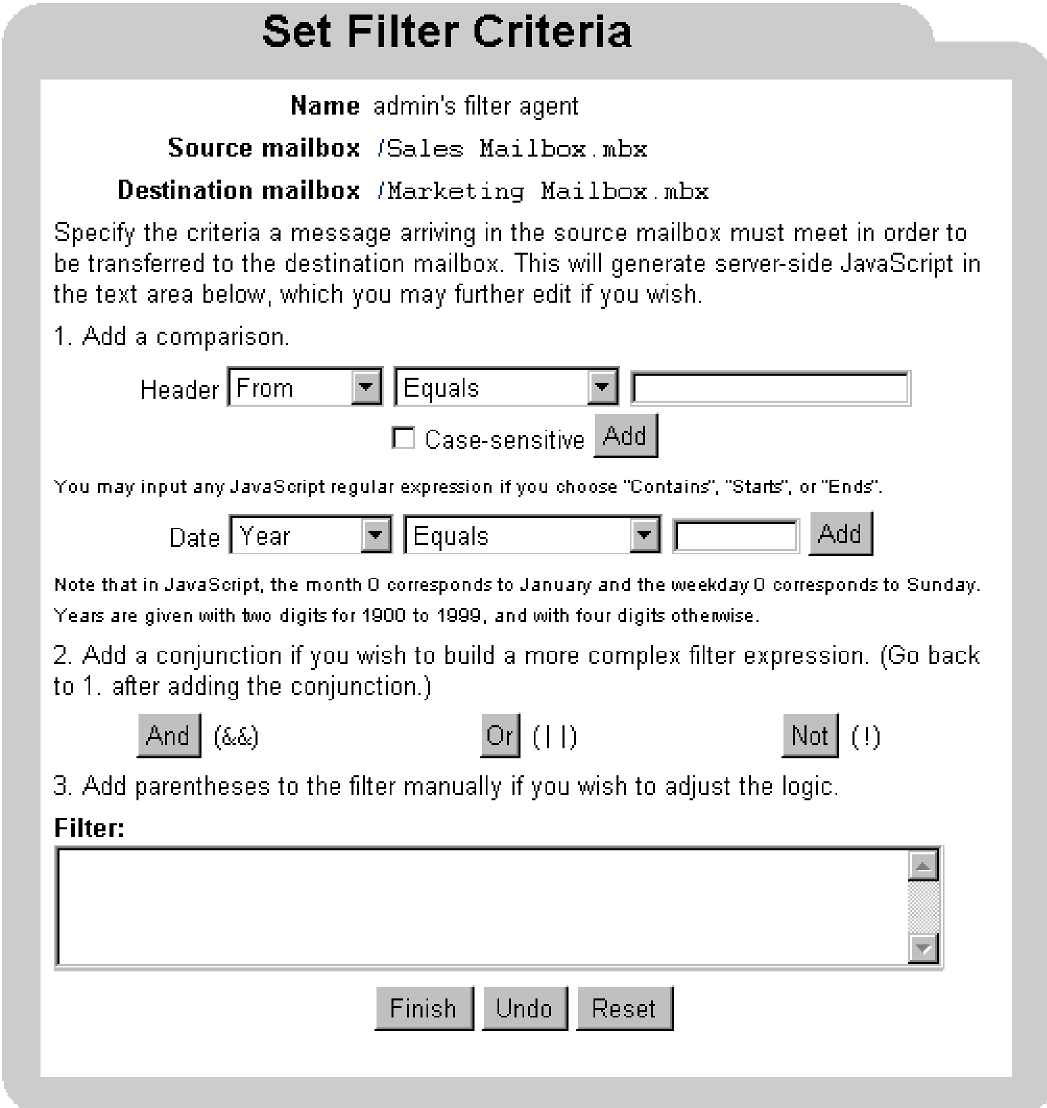
3. If you want to change the default agent name, highlight the text in the Agent Name field and enter a new name.
   - The Agent Name exists only for your own reference when examining the agents that are set on the source mailbox.
4. Press the Tab key or click in the next field.
5. Enter the mailbox name in which email will be examined for the criteria in the Source Mailbox field.
   - The source mailbox is the mailbox the filter will look to in order to compare its contents with the filter criteria.
   - The source mailbox is a URL and must begin with a slash (/).
6. Enter the location of the recipient mailbox in the Destination Mailbox field.
   - This is where the mail will be forwarded. If the destination mailbox does not already exist, the first message delivered there creates it.
   - The source mailbox is a URL and must begin with a slash (/).

- Here is an example of a completed screen:



7. Click on the Next button.

- The Set Filter Criteria screen displays:



- The next section describes how to use this screen to build a JavaScript expression. The expression represents the criteria that a message arriving in the source mailbox must contain in order to be transferred to the destination mailbox. You can use the following buttons at any time:

Button	Result
Undo	Deletes the action(s) after the last Add button was clicked. You can perform successive Undo actions.
Reset	Clears all field selections.
Finish	Accepts the current configuration on the screen.

8. Click on the first Header drop-down list and select the message header criteria. The following are the header elements you can select:
   - From, To, Subject, Date, Reply-To, Sender
9. Click on the next drop-down list to the right and select a comparison operator. The following are the available choices:

- Equals, Does not Equal, Contains, Begins, Ends

10. Enter the appropriate comparison text in the right-hand text box. If you selected Contains, Starts, or Ends, you may use a JavaScript regular expression in this text box.
    - For example, if you chose "To" and "Equals" from the drop-down lists, then in the text box you would enter the name of a person, such as "John Doe" or "john@companyname.com."
11. Click in the check box if the criteria must be case-sensitive.
12. Click on the Add button.
    - The server-side JavaScript code displays in the Filter field:

Filter:

```
(message.getHeader('From').search(/^John Doe$/i) >= 0)
```

13. If that is the extent of your criteria, skip to Step 20.
14. Click on the first Date drop-down list and select the date criteria that a message arriving in the source mailbox must contain in order to be transferred to the destination mailbox. The following are the date elements you can select:
    - Year, Month, Day, Weekday, Hour, Minute
15. Click on the next drop-down list to the right and select a comparison operator. The following are the available choices:
    - Equals, Does not Equal, Is Greater Than, Is Less Than, Is Greater or Equal, Is Less or Equal
16. Enter the appropriate JavaScript in the right-hand text box.
    - The following table describes how JavaScript handles date elements:

Element	JavaScript Code
Days	Use the numbers 0–6, where 0=Sunday
Months	Use the numbers 0–11, where 0=January
Years	Use two digits for 1900–1999, four digits otherwise

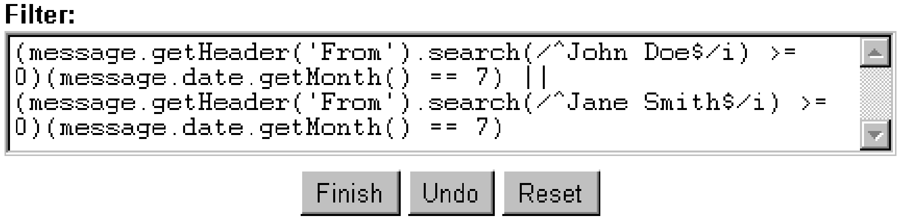
- For example, let us assume you chose "Month" and "Equals" from the drop-down lists. In the text box, you could enter the JavaScript number for the month. For August, you would use "7."
- The server-side JavaScript code displays in the Filter field:

Filter:

```
(message.getHeader('From').search(/^John Doe$/i) >=
0)(message.date.getMonth() == 7)
```

17. If that is the extent of your criteria, skip to Step 20.
18. To continue adding criteria, click on the appropriate conjunction button (And, Or, Not).
19. Repeat Steps 8 through 18 as needed to build your expression.

- When you are finished, the Filter field shows the completed expression:



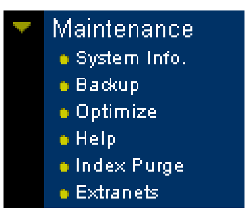
20. If you need to adjust the logic, add or delete parentheses to the expression in the Filter field.
21. Click on the Finish button.
    - A confirmation message displays:

Viewing System Information

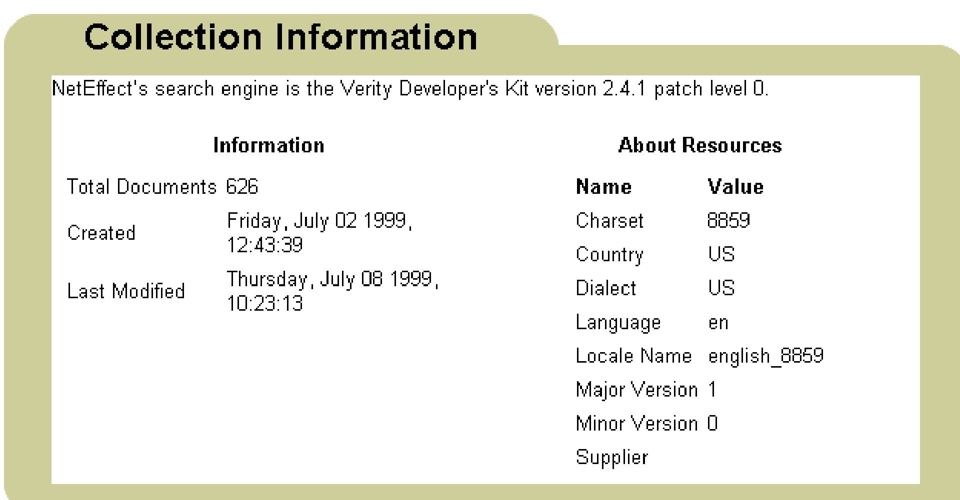
The Site Administrator can view the system information in the Collection Information screen. The information listed here is read-only.

The Collection Information screen displays when the Site Administrator first logs on. Another way to access this screen is to select Site Administration from the Show menu. A third way is described below.

1. In the Side Navigation Bar, click on the Maintenance menu triangle to expand it.



2. Click on the System Info link.
    - The Collection Information screen displays:



Collection Information

NetEffect's search engine is the Verity Developer's Kit version 2.4.1 patch level 0.

Information

Total Documents	626
Created	Friday, July 02 1999, 12:43:39
Last Modified	Thursday, July 08 1999, 10:23:13

About Resources

Name	Value
Charset	8859
Country	US
Dialect	US
Language	en
Locale Name	english_8859
Major Version	1
Minor Version	0
Supplier	

Note

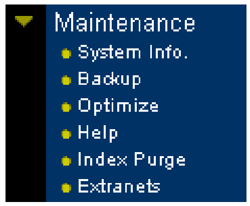
The InfoPortal Backups only back up the database; they do not back up the documents themselves.

Creating a Backup Schedule

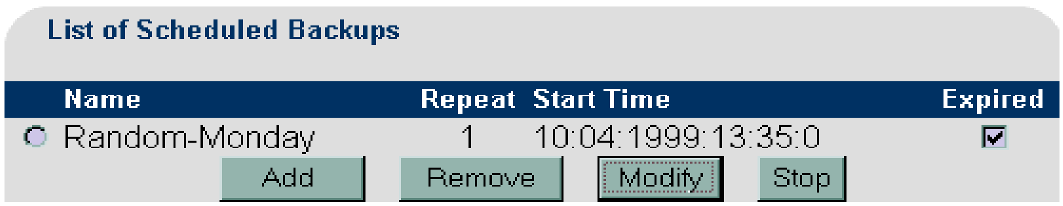
This procedure backs up all database data to a specified directory. You can also specify the intervals at which backups occur.

Backup does not back up the documents themselves. You should manually back them up on a regular basis, preferably when the database backup is performed.

1. In the Side Navigation Bar, click on the Maintenance menu triangle to expand it.

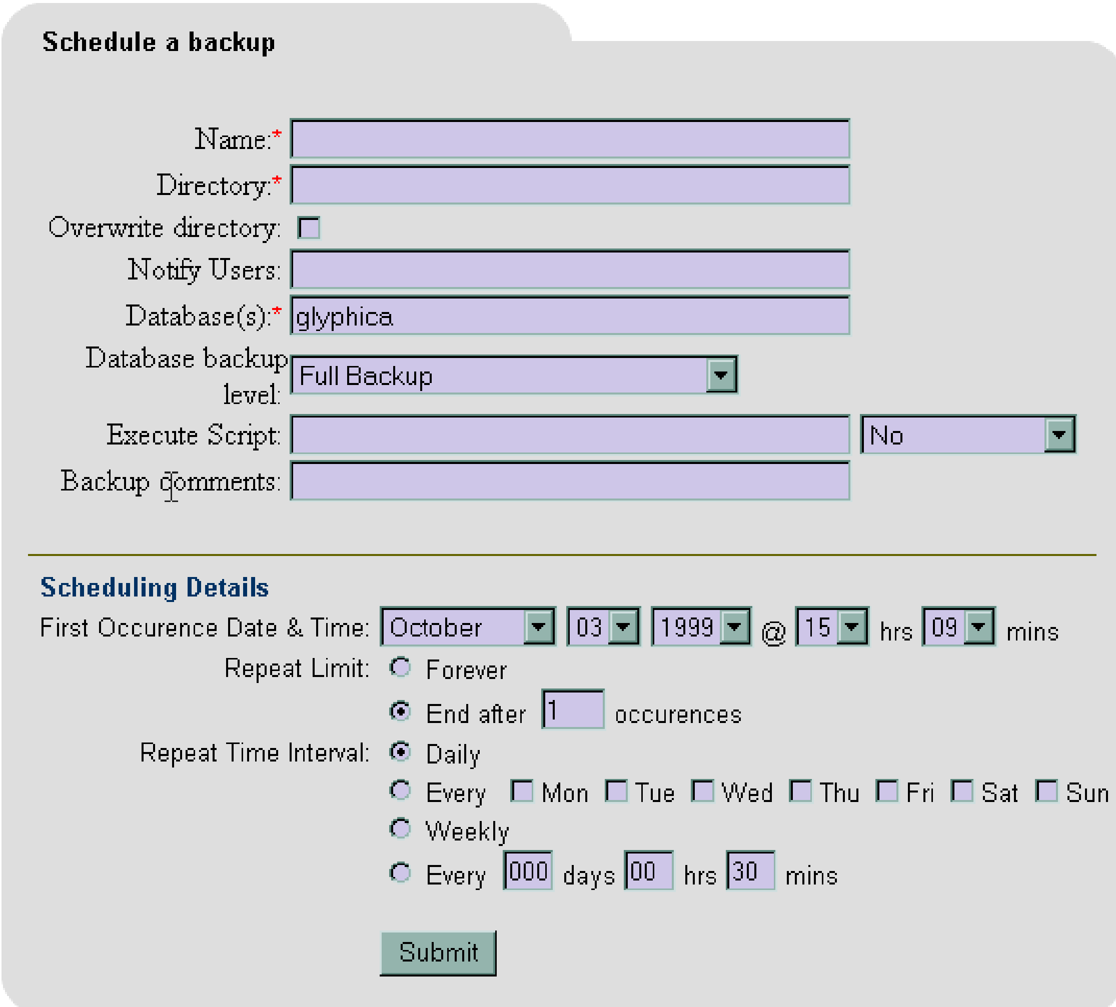


2. Click on the Backup link.
   - The List of Scheduled Backups screen displays:



3. Click on the Add button.

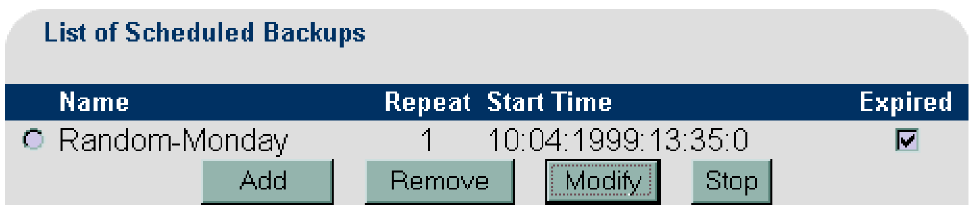
- The Schedule a Backup screen displays:



4. Enter a name for the backup schedule process. (Example: <servername> weekly)
5. Enter the directory path for the backup file. (Example: C:\glyphica\backups)
6. If you want to back up over an existing backup file of the database in an existing directory, click in the Overwrite Directory check box. Otherwise, a separate backup file is always created.
7. Click in the Notify Users field.
8. Enter the user IDs of those who should be notified when the backup is finished.
9. Enter the name of the database for this backup schedule. The default database that is automatically suggested for the backup is glyphica, as this is the default database name during the install. To remove “glyphica”, select it and delete it, then type in the name of the database if it deffers from the default install.
10. Click on the drop-down list for the Database backup level field.
11. Select a level from the list.
    - Options: Full Backup (default), Changes since last full backup, and changes since most recent backup.
12. If you want to execute a script as part of the backup, type the directory path andfile-name of the script in the Execute Script text box. For example, you may wish to backup the documents after performing a backup. If the name of the script you cre-

ated to backup the documents was called "documents.bat" you would enter it here and then select for it to occur After Backup.

13. Click on the drop-down list to the right of the Execute Script field.
14. Select an item from the list.
    - Options: After Backup (default), Before Backup, Only, and No. (Only means that the backup will NOT backup. The script will only be run.)
15. Click in the Backup Comments field.
16. Enter any comments you want associated with the backup.
17. In the Scheduling Details area, select the First Occurrence Date and Time from the drop-down lists.
18. Click on the radio button for either Forever or End after...occurrences in the Repeat Limit field.
    - If you selected End after...occurrences, type number in the Occurrences box if you want the backup to happen more than once.
19. Click on the radio button for a Repeat Time Interval.
    - Options: Daily, Every [Day of Week], Weekly, Every [Days/Hours/Minutes].
    - If you click on Every [Day of Week], also click on the check box to the left of the day you want. If you click on Every [Days/Hours/Minutes], also enter numbers in the appropriate text boxes to the left of the time interval you want.
20. Click on the Submit button.
    - The backup displays in the List of Scheduled Backups screen.



- After the entire backup cycle completes, the Expired field displays a check mark.

Each backup is placed in a separate folder in the directory you specified. The folder's name is based on the date when it was run for evample: <backup19990729>, where 1999 is the year, 07 is the month and 29 is the day.

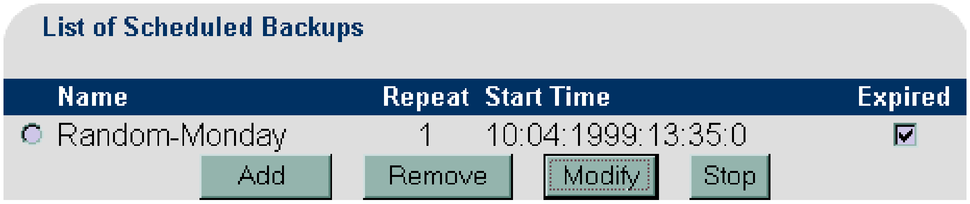
Modifying a Backup Schedule

This procedure makes changes to an existing backup schedule.

1. In the Side Navigation Bar, click on the Maintenance menu triangle to expand it.

2. Click on the Backup link.

- The List of Scheduled Backups screen displays:



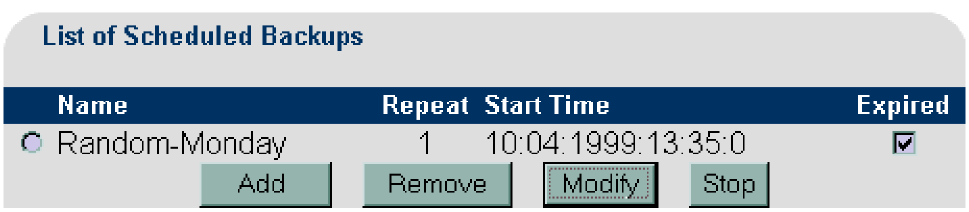
3. Click on the radio button to the left of the backup you want to change.
4. Click on the Modify button.
   - The Schedule a Backup screen displays with the backup information.
5. Make the appropriate changes.
6. Click on the Submit button.

Stopping a Scheduled Backup

This procedure stops future occurrences of a scheduled backup. It does not remove the backup process from the List of Scheduled Backups.

1. In the Side Navigation Bar, click on the Maintenance menu triangle to expand it.

2. Click on the Backup link.
   - The List of Scheduled Backups screen displays:

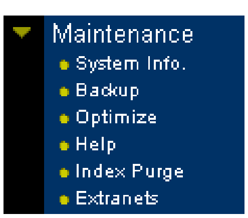


3. Click on the radio button to the left of the backup you want to delete.
4. Click on the Stop button.
   - The Expired field will display a check mark to show it has stopped.

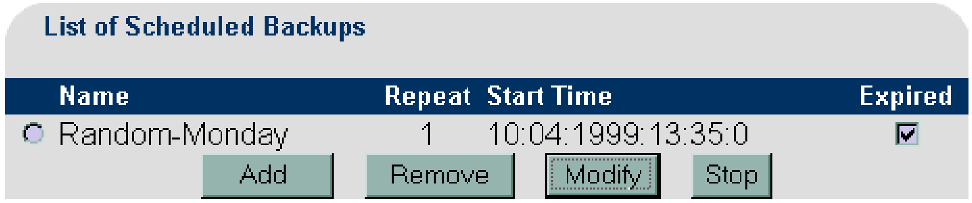
Removing Scheduled Backup

This procedure removes the selected backup from the List of Scheduled Backups.

1. In the Side Navigation Bar, click on the Maintenance menu triangle to expand it.



2. Click on the Backup link.
   - The List of Scheduled Backups screen displays:



3. Click on the radio button to the left of the backup you want to delete.
4. Click on the Remove button.
   - The backup is removed from the List of Scheduled Backups.

Restoring the Database from a Backup

In the unlikely event of a database corruption or catastrophic loss of the database, you can manually restore the database from backed-up data and files.

Stop the Service

First stop the web server service before running the restored script. See instructions concerning stopping and starting wab servers below

Running the Script

After stopping the service, run the restoredb script.

1. Select the MS-DOS Command Prompt from the Programs menu.
2. In the DOS window, navigate to the glyphica\apps\util\ directory.
3. Enter the following command:
   `restoredb` <dbname> backupfile
   - where `dbname` is the name used while backing up the database.
   - glyphica\apps\util\ is the location of the restoredb script.
4. Once the restoration has been completed, restart the web server.

Stopping and Starting Web Servers

Stopping and Starting Netscape Enterprise Server Running on Windows NT

To stop the the NES server:

1. Open the Control Panel.
2. Double-click on Services.
3. Scroll through the list and click on the Netscape Enterprise Server 3.5.1 service:
   - Example: Netscape Enterprise Server 3.5.1 (<hostname>)
4. Click on the Stop button.

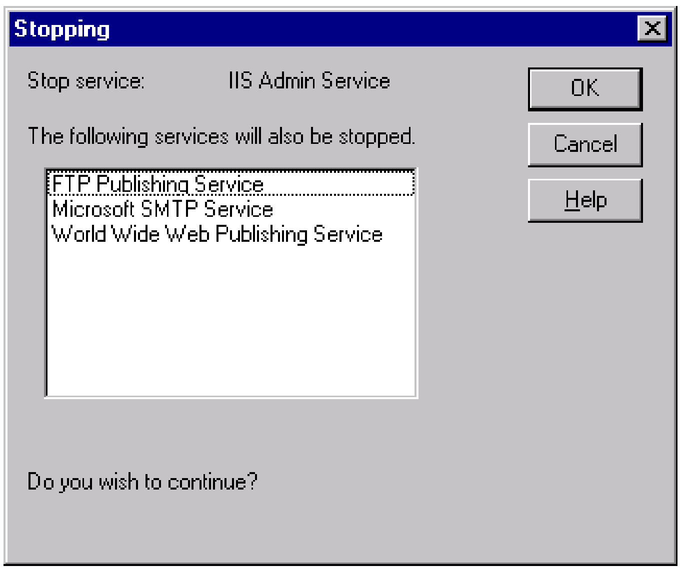
To start the NES server:

1. Open the Control Panel.
2. Double-click on Services.
3. Scroll through the list and click on the Netscape Enterprise Server 3.5.1 service:
   - Example: Netscape Enterprise Server 3.5.1 (<hostname>)
4. Click on the Start button.
5. Click on the Close button.

Stopping and Starting an Internet Information Server (ISS) Running on Windows NT

To stop the the IIS server:

1. Open the Control Panel.
2. Double-click on Services.
3. Scroll through the list and click on the IIS Admin Server.
   - The following window displays:



4. Click on the OK button.
5. Click on the Close button.

To start the IIS server:

1. Open the Control Panel.
2. Double-click on Services.
3. Scroll through the list and click on the World Wide Web service (usually last in the list).
4. Click on the Start button.
5. Click on the Close button.

Note

Always stop Microsoft Internet Information Server installation by stop-

Note

Starting the World Wide Web service will automatically start the admin service. However, the reverse is not true.

Starting and Stopping a Netscape Enterprise Server Running on Solaris

There are two ways to manage the Netscape server installation on Solaris. The first is to log into the admin server created at the time that the server itself was created. The admin server URL will probably look like the machine's name, a colon (:) and then a port number. For example:

http://hypertstate:8080

The port number is determined at the time of the server installation. Enter the URL into your browser. Once on the admin page, there will be a gray button that appears with the name of the machine on that button. Press the button. Inside the next screen, you have the option to stop the server here. Press Stop here, and you will receive a success message should it successfully stop. Likewise, you may start it here.

The second way to start and stop the server:

1. Navigate to the netscape server directory.
2. Navigate to Suitespot/https-machinename
3. If the machine is **not** set to restart from inittab, and if you are logged in as root user, enter:

   ./stop
4. If you are logged in as the owner of the files, enter:

   stop
5. To start the server when logged in as root, enter:

   ./start
6. To start the server when logged in as the owner of the files, enter:

   start

NOTE: If you elected to have the Netscape Enterprise Server placed under inittab during the process of install, this will only temporarily shut down the server—as soon as the success error message has cleared, the server will automatically restart.

This procedure stops the server when the inittab function has been called:

1. From the Netscape browser, enter the machine name followed by a colon and the port number of the install.
   - Example: http://<servername>:8080
2. Enter the username and password set up to administrate the server.
   - At the top of the screen, around the Netscape Server Administration logo, a button titled “Web Publishing” displays.
3. Click on the Web Publishing button.
4. Select “Web Publishing State,” located on the left-hand side of the screen.
5. Switch the Web Publishing server state from **on** to **off**.
6. Click OK.
7. Select Save.
   - **Select the Save option only!**
8. Click OK.
9. Click the Server Preferences button.
   - The button is located at the top of the screen, near the Netscape Server Administration logo.
10. Verify that the server is in the “off” position.
11. Exit the Netscape Administrator tool and return to the UNIX console.

This procedure starts the server when the inittab function has been called:

1. From the Netscape browser, enter the machine name followed by a colon and the port number of the install.
   - Example: http://<servername>:8080
2. Enter the username and password set up to administrate the server.
   - At the top of the screen, around the Netscape Server Administration logo, a button titled “Web Publishing” displays.
3. Click on the Web Publishing button.
4. Select “Web Publishing State,” located on the left-hand side of the screen.
5. Switch the Web Publishing server state from **off** to **on**.
6. Click OK.
7. Select Save.
   - **Select the Save option only!**
8. Click OK.
9. Click the Server Preferences button.
   - The button is located at the top of the screen, near the Netscape Server Administration logo.
10. Verify that the server is in the “on” position.
11. Exit the Netscape Administrator tool and return to the UNIX console.

Optimizing the Search Index

InfoPortal, by default, optimizes the index every night at midnight. Use the Optimize features below only if you wish to optimize more frequently, or immediately after adding or deleting a large number of documents (mass batch index or metadata index procedure, for example). The default optimization time is not user configurable. Please contact Glyphica Technical Support if you require a change in this procedure.

1. In the Side Navigation Bar, click on the Maintenance menu triangle to expand it.

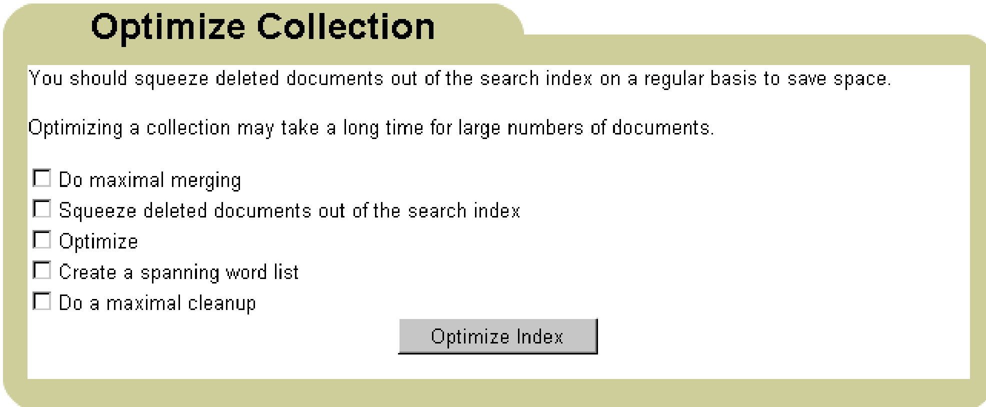
2. Click on the Optimize link.

Note

Optimizing a collection may take a long time for large numbers of documents.

Optimization also may impact server performance during the Optimization proceedure.

- The Optimize Collection screen displays:

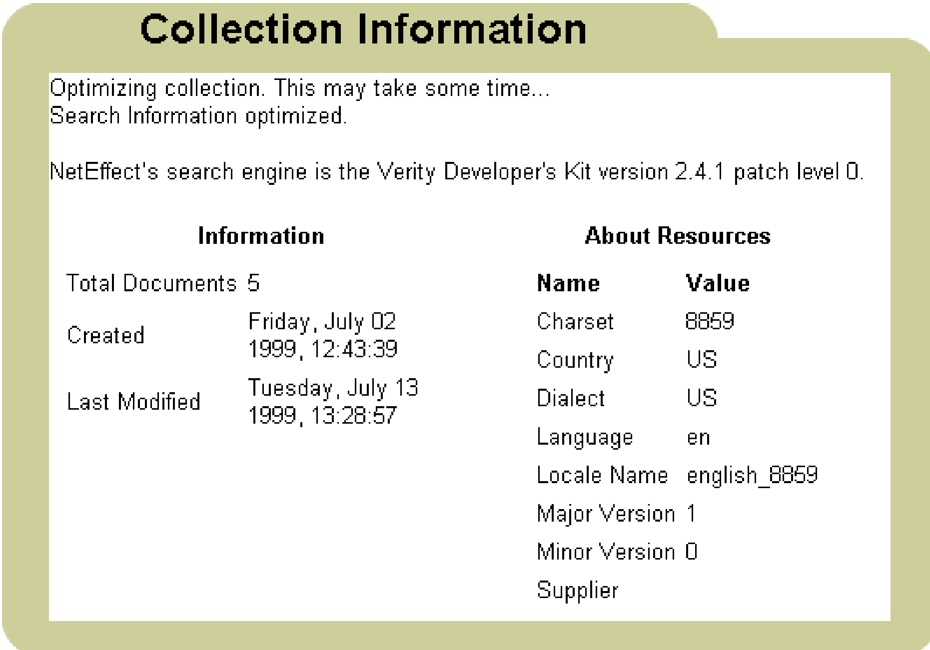


3. Click on the check box to the left of the routines you want to run (you can choose multiple routines).
   - The following table describes the routines:

Routine	What It Does
Do Maximal Merging	Performs a merging function on the partitions to create partitions that are as large as possible. Partitions can have as many as 65,000 documents in them. It is faster to search over a single partition because the search engine opens only one file.
Squeeze Deleted Dcouments Out of the Search Index	Recovers space in an index and improves search performance.
Optimize	Optimizes the databases in the index by linearizing the data and streamlining the index metadata. It also allows the index to grow to a much larger size. In effect, Optimize sacrifices some disk space in favor of faster searches.
Create a Spanning Word List	Creates a word list across all the index's partitions. A database consists of numerous smaller units called partitions, each of which includes a word list. As with the Optimize function, this selection trades off disk space for greater speed.
Do a Maximal Cleanup	Performs the most comprehensive housekeeping possible, and removes out-of-date index files. This selection is recommended only if an isolated index is being prepared for publication, or if the document database is taking up more than 20% of the space occupied by the documents it manages.

4. Click on the Optimize Index button.

- The Collection Information screen displays with messages telling you when optimization is taking place, and when it completes.

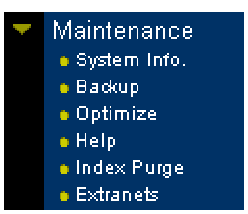


- Depending on the number of documents envolved, the browser window may time out before optimization is complete. This is not a problem--the optimization will continue even if the browser window is closed.
- You can verify that optimization is complete using the View Logs feature. See “Viewing the Log,” page 4.81 and look for an entry that state:

Indexing the Help Files

Use this function to index the Help files into the InfoPortal database. Until this operation has been completed, the Help files will not be searchable.

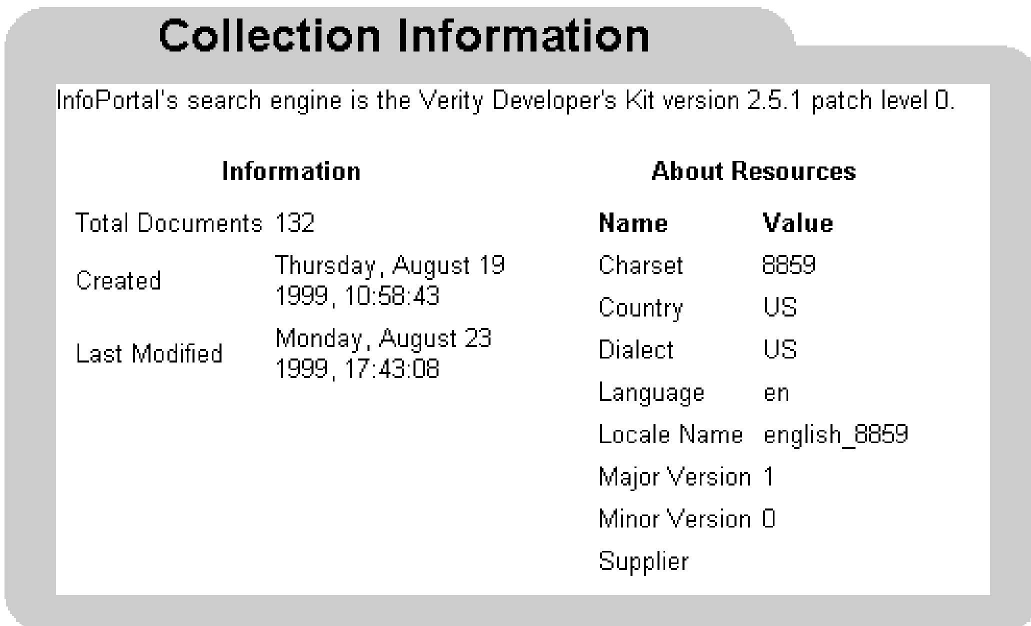
1. In the Side Navigation Bar, click on the Maintenance menu triangle to expand it.



2. Click on the Help link.

- The Index Help Files screen displays:

3. Click on the Index Help Files button.
   - The Collection Information screen displays after the Help files are indexed..



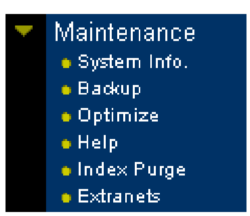
   - You can verify that indexing is complete using the View Logs feature. See "Viewing the Log," page 4.81 and look for PDF file entries that state "Index Complete:"

08/23/99 17:43:17	Event	Index Complete	Document: d:\glyphica82\data\help\author\usrsrcops.pdf

Purging the Search Index

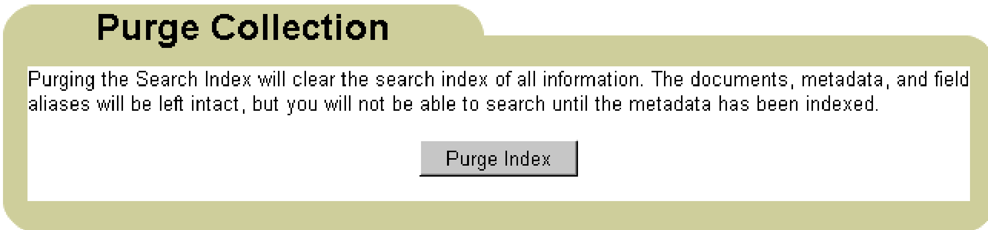
This procedure clears all information from the search index. Documents, metadata, and field aliases are left intact. You cannot search the collection again until a Batch Index or Metadata Index has been run, or the database has been restored.

1. In the Side Navigation Bar, click on the Maintenance menu triangle to expand it.



2. Click on the Index Purge link.

- The Purge Collection screen displays:

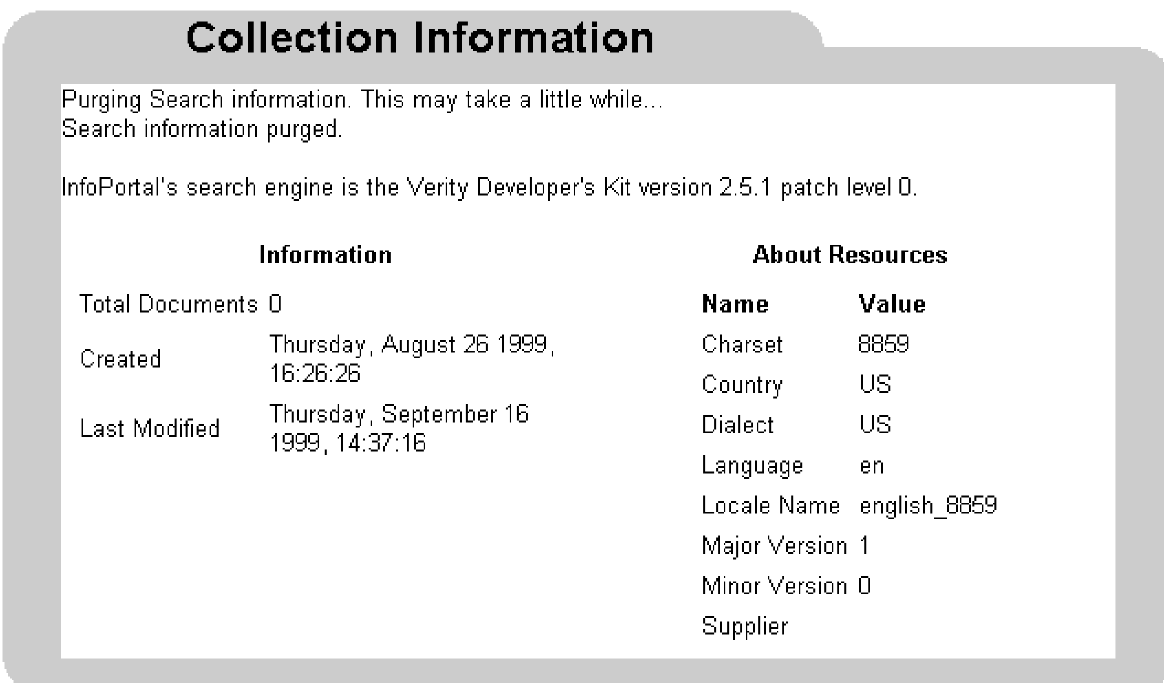


Note

Purging Search information may take a long time for large numbers of documents.

3. Click on the Purge Index button.
   - A confirmation message displays:

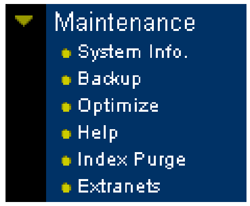
4. Click on the OK button.
   - The Collection Information screen displays with messages telling you when the purge is taking place, and when it completes.



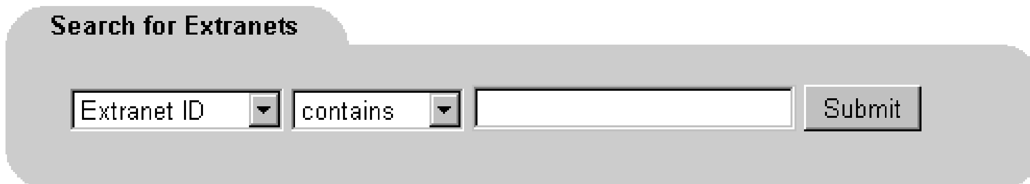
Searching for Extranets

This procedure allows the Site Administrator to search for Extranets throughout the Portal. The search results display links so that the Site Administrator can go directly to the Extranet information to make changes.

1. In the Side Navigation Bar, click on the Maintenance menu triangle to expand it.



2. Click on the Extranets link.
   - The Search for Extranets screen displays:



3. Enter your search criteria.
   - Clicking on the Submit button, without selecting anything, returns all users in the system.
   - Searches can be created for Extranet ID or Display name.
   - The following operators are available: contains, begins with, equals.
   - Wildcards are allowed in the text box. For example, a search on "Smi?" will return users with names such as Smith or Smithson. An asterisk (*) alone entered into the text box returns all users in the system.
4. Click on the Submit button.
   - The search results display:

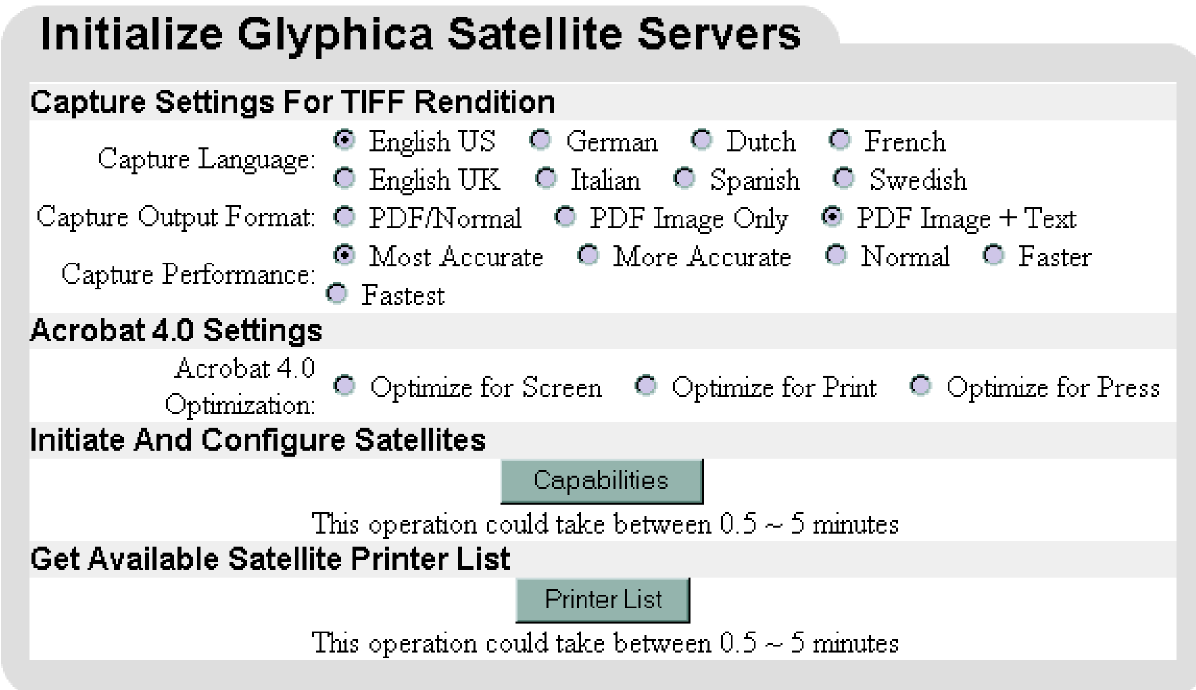
	Extranet ID	Extranet Name	With UI
Load	Options_Link	Options Link	yes
Load	Vendor	VendorNet	yes
Load	Optionslink	OptionsLink Extranet	yes
Load	TIM	TIM	yes
Load	DLJ	DLJ	yes

5. Click on the Load link to the left of the Extranet you wish to view.
   - The Edit Extranet screen displays (Account Administration mode). See section 5 for information concerning managing Extranets.

Configuring Adobe Capture Settings

This procedure configures Capture settings for TIFF Renditions. TIFF documents are generally fax or scans of paper documents. They are large files as a general rule. Converting them to Adobe Acrobat makes them much smaller, and also converts the text images to text so that the document can be searched.

1. Click on the Satellite Servers menu.
2. Click on the Initialize link.
   - The Initialize Glyphica Satellite Servers screen displays. The top section of this screen contains the Capture Settings for TIFF Rendition:



3. Click on the radio button for the appropriate Capture Language.
4. Click on the radio button for the appropriate Capture Output Format.
   - The following table lists the available options with an explanation of each one:

Format	Explanation
PDF/Normal	A PDF file in which all text is searchable. The text can be indexed, searched, and copied. Page formatting and graphics are preserved. The files are significantly smaller than PDF Image files, which makes them ideal for online distribution.
PDF Image Only	A PDF document with no searchable text (OCR does not run in this mode). It contains only a bitmap picture of the original document large file size.
PDF Image + Text	A PDF document that combines PDF Normal and Image features. It contains a a bitmap picture of the original document as well as recognized text that is hidden behind the picture. This results in searchable text and a document that is identical to the original (such as for legal or archival purposes).

5. Click on the radio button for the appropriate Capture Performance preference.

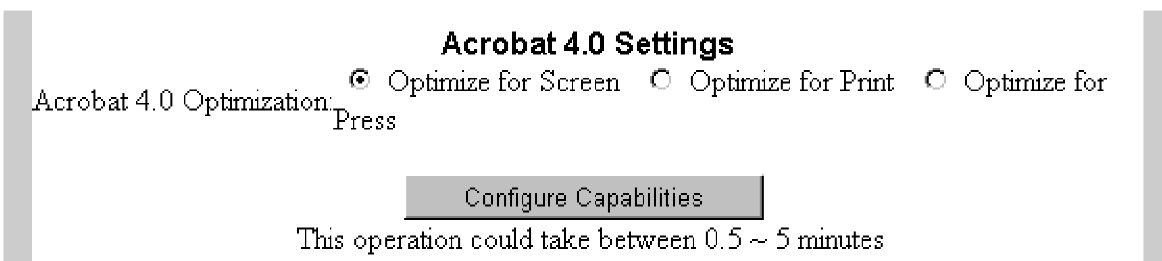
- The Performance preference adjusts the balance between accuracy and processing time. The following table lists the available options with an explanation of each one:

Format	Explanation
Most Accurate	Uses every available technique to recognize words. This option requires the most processing time.
More Accurate	Compromises between the Most Accurate and Normal options.
Normal	Compromises between the Most Accurate and Fastest options.
Faster	Compromises between the Normal and Fastest options.
Fastest	Requires the least processing time, but also produces the most suspects and recognition errors.

Configuring Adobe Acrobat Settings

This procedure configures Acrobat 4.0 optimization settings. Three settings are available:

1. Click on the Satellite Servers menu.
2. Click on the Initialize link.
   - The Initialize Glyphica Satellite Servers screen displays. The middle section of this screen contains the Capture Settings for TIFF Rendition:



3. Click on the radio button for the appropriate optimization.
   - Options: Optimize for Screen, Optimize for Print, Optimize for PressInitializing

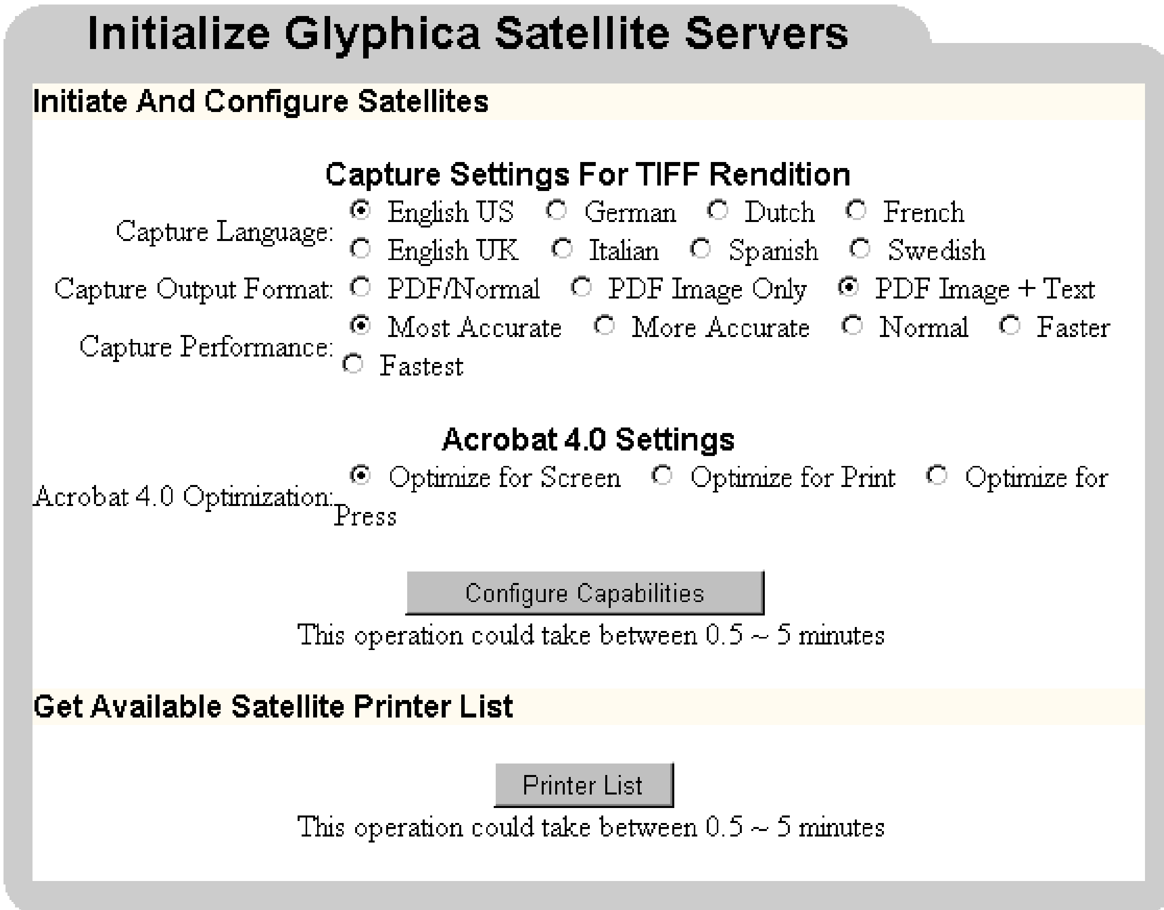
Optimize for Screen	Use this setting for PDF files that will be displayed on the web or an intranet, or that will be distributed and viewed through an email system. Settings are usually optimized for 72-dpi screens.
Optimize for Print	Use this setting for PDF files that are intended for printers, digital copiers, CD-ROM publishing, or sending to a client as a publishing proof.
Optimize for Press	Use this setting for PDF files that will be printed as high-quality final output.

and Configuring Satellite Servers

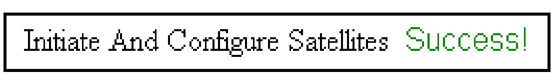
This procedure checks the status of the conversion capabilities of the Glyphica Satellite Servers and permits the Administrator to troubleshoot and restart these servers.

1. Click on the Satellite Servers menu.

2. Click on the Initialize link.
   - The Initialize Glyphica Satellite Servers screen displays:



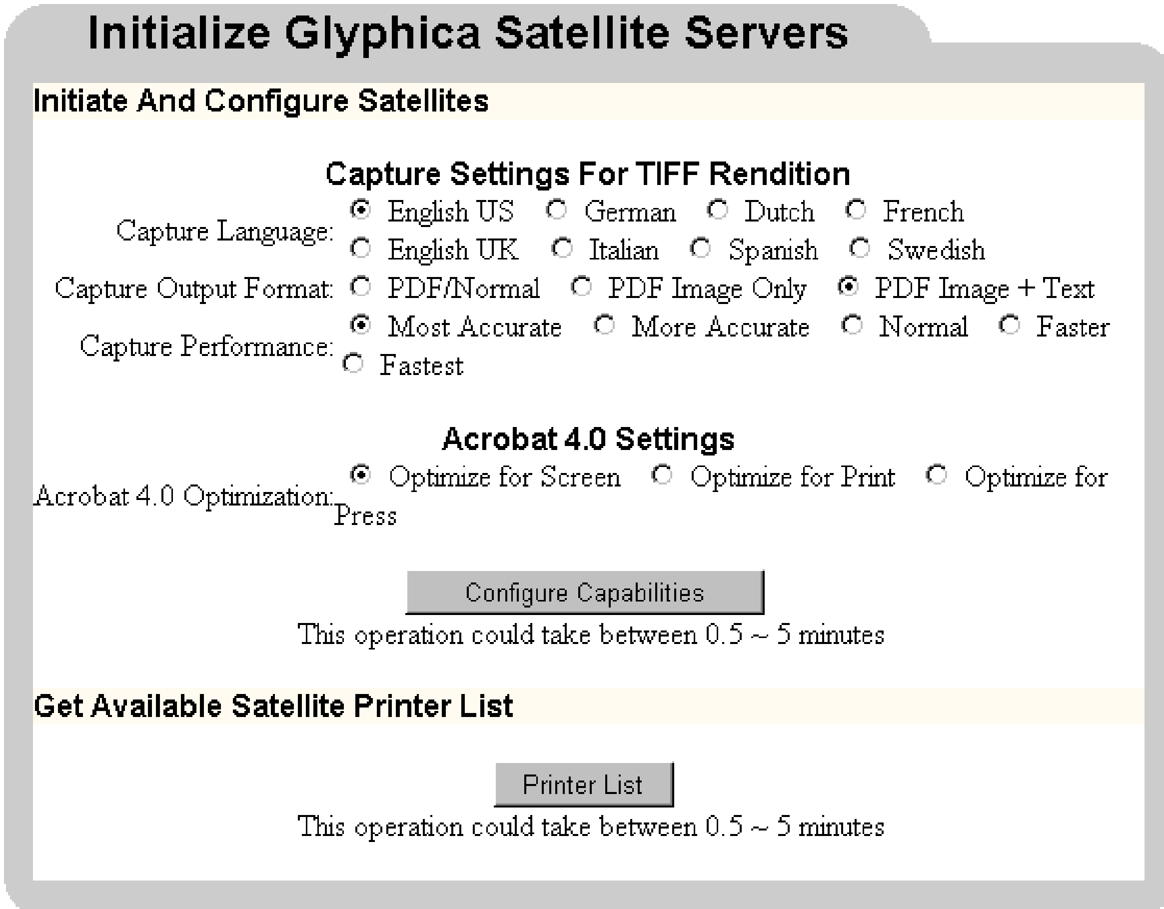
3. Locate the Initiate And Configure Satellites section.
4. Click on the Configure Capabilities button.
   - InfoPortal displays a success/failure report at the top of the screen
   - For a list of available capabilities, go to View Logs and view the list that appears in the log file..



Checking Satellite Printer Availability

This procedure checks the availability of printers on the Glyphica Satellite Servers list.

1. Click on the Satellite Servers menu.
2. Click on the Initialize link.
   - The Initialize Glyphica Satellite Servers screen displays:



Note: Status of network connectivity to printers may affect the reporting and accessibility of printing capabilities.

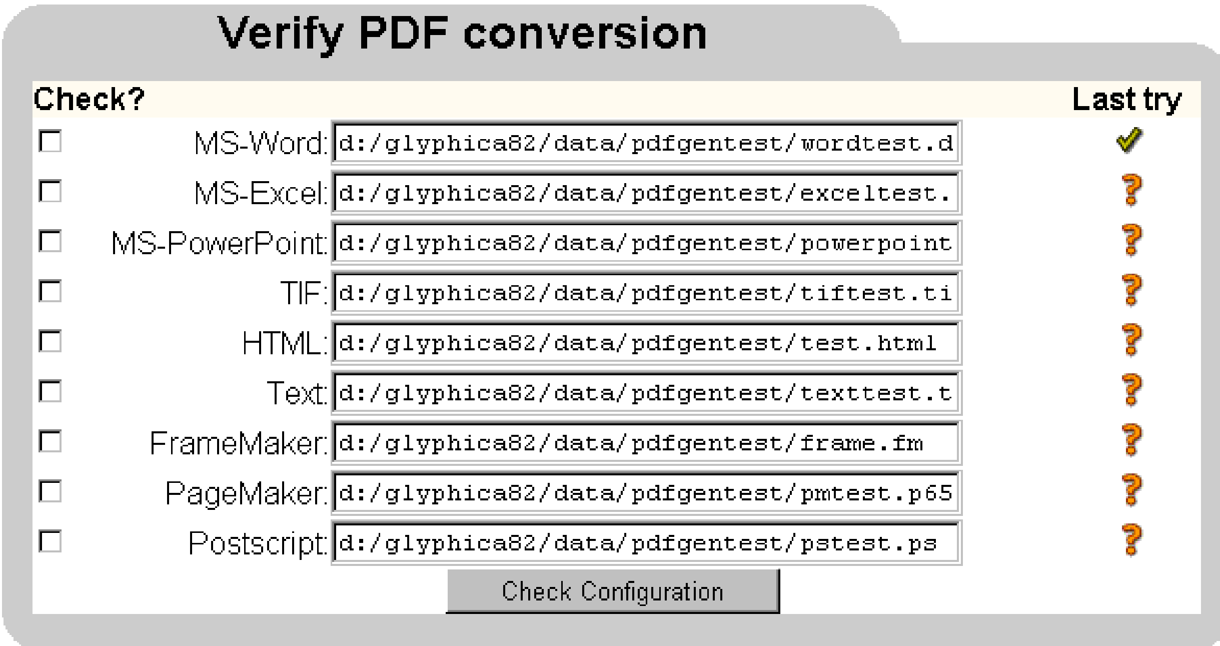
3. Locate the Get Available Satellite Printer List section.
4. Click on the Printer List button.
   - InfoPortal displays a success/failure report at the top of the screen.
   - Go to View Logs for an additional success/failure report

Testing PDF Conversions

This procedure checks the PDF conversion capability.

1. Click on the Satellite Servers menu.
2. Click on the Verify link.

- The Sample Files for PDF Conversion screen displays:



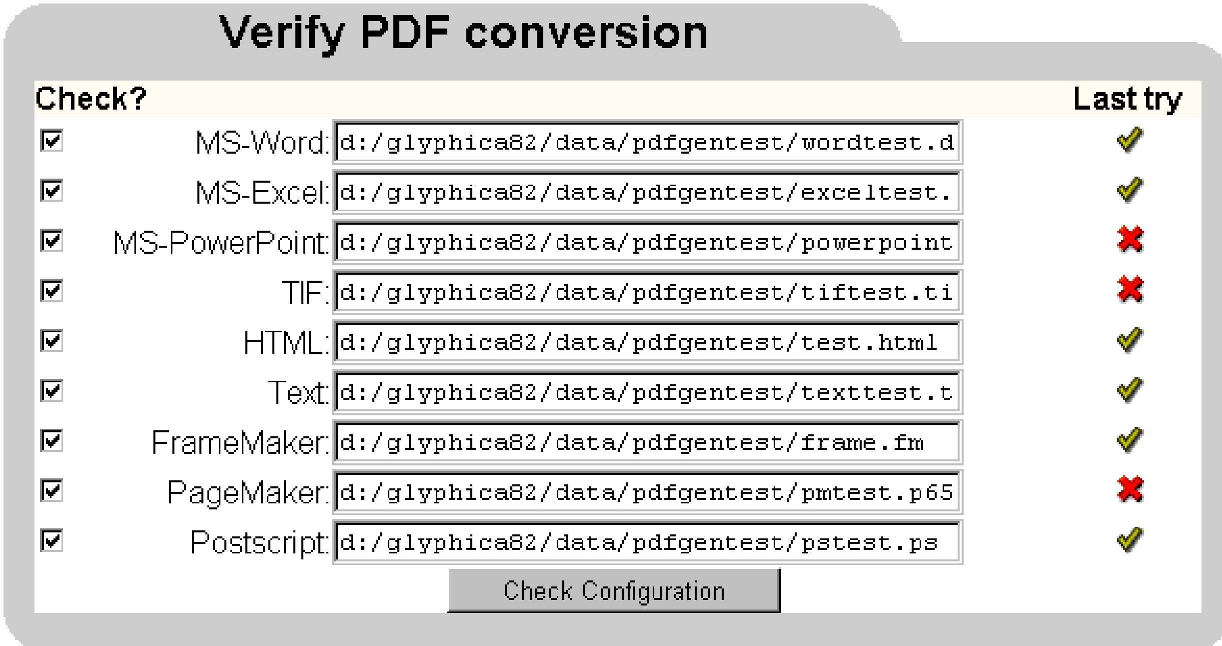
3. Click on the check boxes for the native formats you want to test.
4. Click on the Check Configuration button.
   - InfoPortal displays a success/failure report at the top of the screen:

Test MS-Word to Pdf Conversion Success!
Test MS-Excel to Pdf Conversion Success!
Test MS-Powerpoint to Pdf Conversion Failed! Failed: No Glyphica Satellite Server capable of rendering d:/glyphica82/data/pdfgentest/powerpointtest.ppt to PDF. Rendition Cancelled
Test TIF to Pdf Conversion Failed! Failed: conversion of input file d:\glyphica_net\satellite\Temp/tiftest_I7026195.tif to output file d:\glyphica_net\satellite\Temp/I2026198.pdf. Reason: TIF2PDF: Capture Dongle limit cannot be checked. Check if dongle is present. TIF conversion cancelled..
Test HTML to Pdf Conversion Success!
Test Text to Pdf Conversion Success!
Test FrameMaker to Pdf Conversion Success!
Test PageMaker to Pdf Conversion Failed! Failed: No Glyphica Satellite Server capable of rendering d:/glyphica82/data/pdfgentest/pmtest.p65 to PDF. Rendition Cancelled
Test Postscript to Pdf Conversion Success!

   - Use this information to troubleshoot any conversion issues.

Error	Meaning
No Glyphica Satellite Server capable of rendering...	Check that the necessary software (Word, Excel, Powerpoint, etc.) is installed.
Capture dongle limit cannot be checked	Make sure the Adobe Capture hardware key (dongle) is attatched to the server.

- In addition, the Verify PDF Conversion screen displays a Last Try column on the right-hand side of the screen:



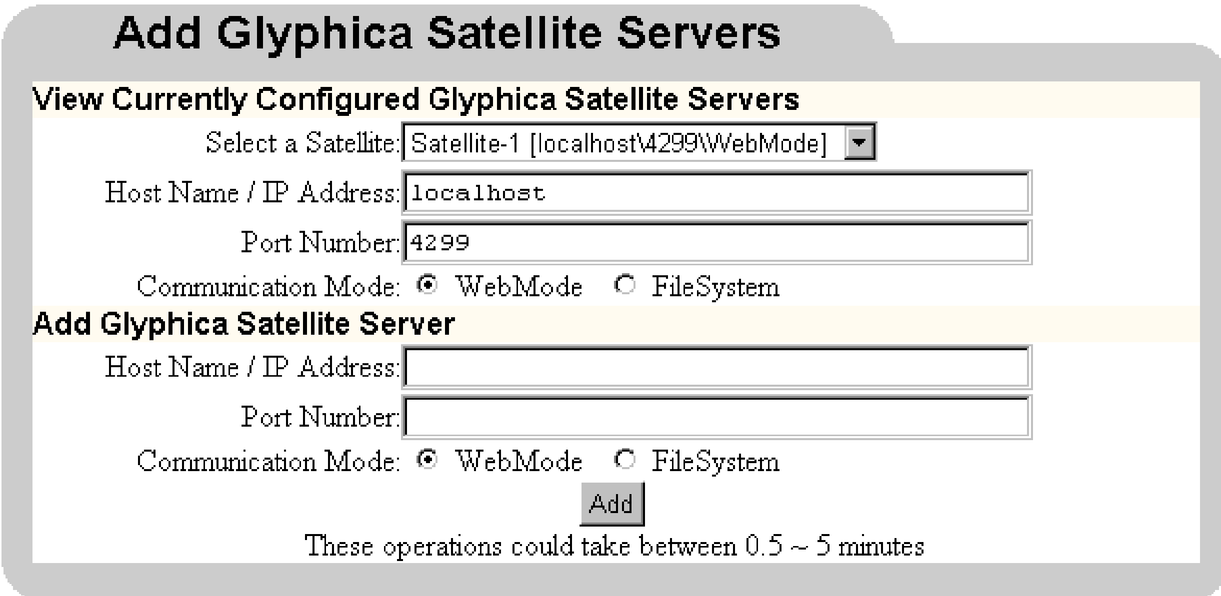
- Green check marks indicate success; red Xs indicate failure. This column is saved as a reference for the next time that the Site Administrator displays the Verify PDF Conversion screen.

Adding a Glyphica Satellite Server

This procedure adds a Glyphica Satellite Server to the list of available servers. You must first install the Glyphica Satellite Server software on the remote machine (see install manual). Satellite server software ai available at additional cost from Glyphica.

1. Click on the Satellite Servers menu.
2. Click on the Add link.

- The Add Glyphica Satellite Servers screen displays:



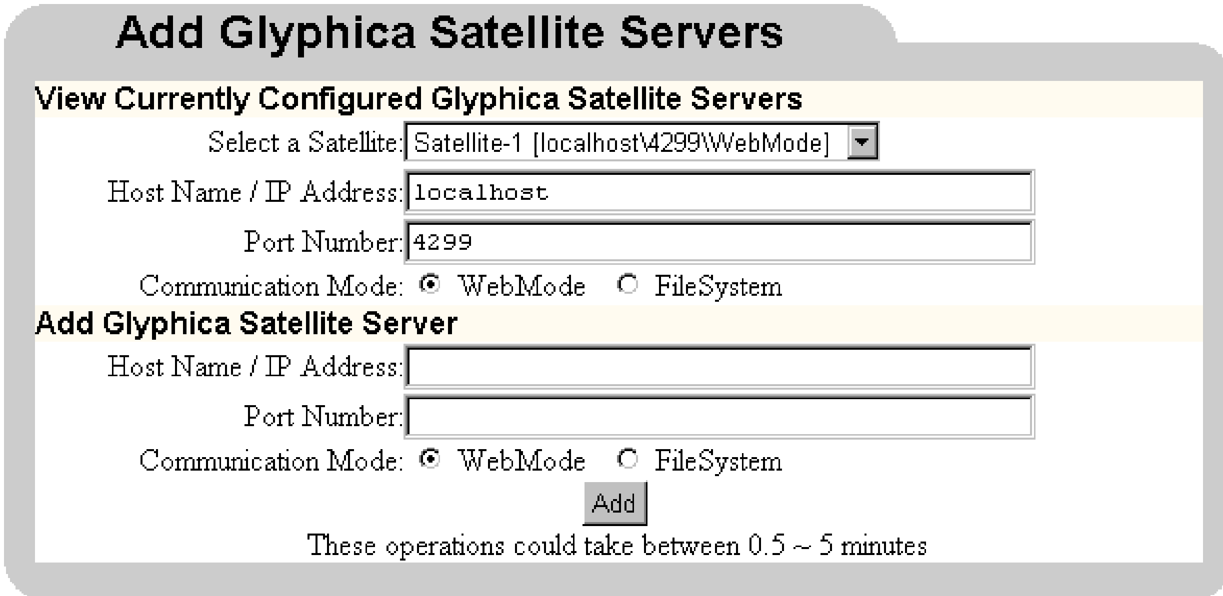
3. Click in the Host Name/IP Address text box in the Add Glyphica Satellite Server section.
4. Enter the hostname or IP address of the server.
5. Press the Tab key.
6. Enter the server's Port number in the Port Number text box.
7. Click on the appropriate radio button in the Communication Mode field.
   - **WebMode:** used for remote Satellite Servers.
   - **FileSystem:** used when the Satellite Server resides on the same machine as the InfoPortal application.
8. Click on the Add button.
   - InfoPortal displays a success/failure report at the top of the screen.

Viewing Current Satellite Server Configurations

This procedure selects a Glyphica Satellite Server so you can see its current configuration.

1. Click on the Satellite Servers menu.
2. Click on the Add link.

- The View Configured Glyphica Satellite Servers screen displays:

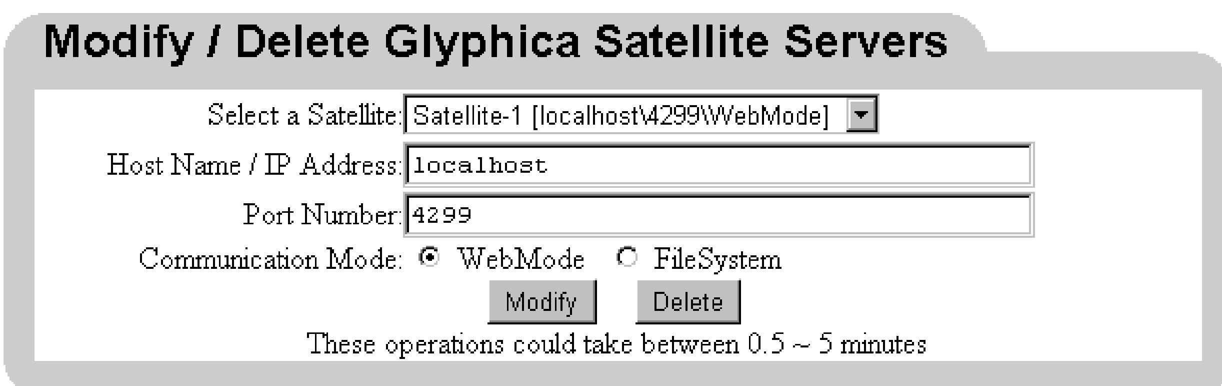


3. Click on the Select a Satellite drop-down list in the View Currently Configured Glyphica Satellite Servers section.
4. Select the Satellite Server you want to view.

Modifying Satellite Server Settings

This procedure changes the address and port information in InfoPortal for an existing Glyphica Satellite Server machine.

1. Click on the Satellite Servers menu.
2. Click on the Modify/Delete link.
   - The Modify/Delete Glyphica Satellite Servers screen displays:



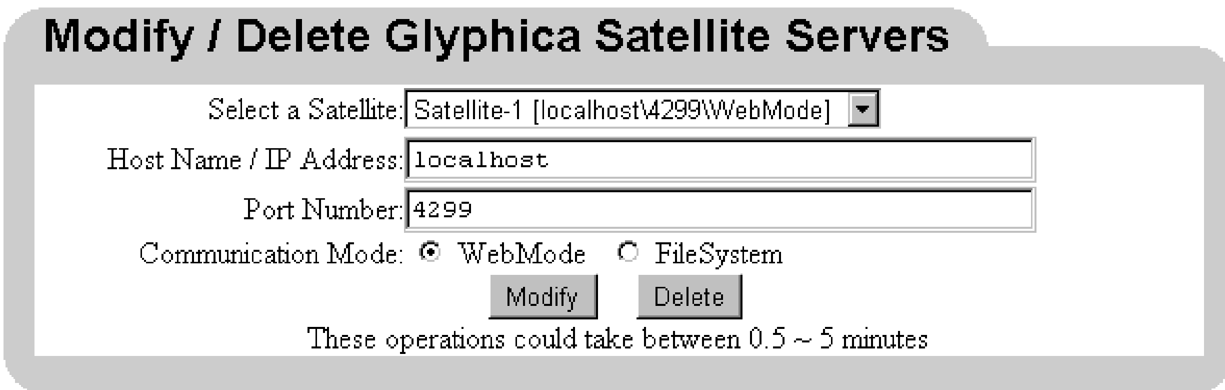
3. Click on the Select a Satellite drop-down list.
4. Select the Satellite Server you want to modify.
5. Click in the field you want to change.
6. Make the appropriate changes.
7. Click on the Modify button.
   - InfoPortal displays a success/failure report at the top of the screen.

- Go to View Logs to view any applicable messages

Deleting Glyphica Satellite Servers

This procedure removes a Glyphica Satellite Server from the list of available servers.

1. Click on the Satellite Servers menu.
2. Click on the Modify/Delete link.
   - The Modify/Delete Glyphica Satellite Servers screen displays:



3. Click on the Select a Satellite drop-down list
4. Select the Satellite Server you want to delete.
5. Click on the Delete button.
   - InfoPortal displays a success/failure report at the top of the screen:
   - Go to View Logs to view any applicable messages.

Viewing the Log

This procedure displays several types of activities on the server and reports of any errors encountered during these activities.

1. Click on the Logs menu.
2. Click on the View link.

- The Log screen displays the last 2048 bytes of activity on the server.

View: Log View last 4096 bytes

Date	Lvl	Module	Message
09/14/99 10:52:00	167	(system)	System fireJEvent::multiple_synchfire Ran one event
09/14/99 10:53:23	289	admin	Information Javascript Loading navbar nodes
09/14/99 11:12:34	325	admin	Information Javascript Loading navbar nodes
09/14/99 11:12:38	325	admin	Debug Javascript # user::set(extranet,Midwave)
09/14/99 11:12:38	325	admin	Debug Javascript # user::set(uiroot,/infoportal/world)
09/14/99 11:12:38	325	admin	Debug Javascript # user::set(cntroot,/extranet/Midwave)
09/14/99 11:12:38	325	admin	Information Javascript content root=/extranet/Midwave
09/14/99 11:12:38	325	admin	Information Javascript redirected to /infoportal/world
09/14/99 11:12:38	325	admin	Verbose Javascript request.redirect called, database update won't happen
09/14/99 11:12:40	284	admin	Debug Javascript # user::set(extranet,Midwave)
09/14/99 11:12:40	284	admin	Debug Javascript # user::set(uiroot,/infoportal/world)
09/14/99 11:12:40	284	admin	Debug Javascript # user::set(cntroot,/extranet/Midwave)
09/14/99 11:12:40	284	admin	Information Javascript content root=/extranet/Midwave
09/14/99 11:12:40	284	admin	Information Javascript redirected to /infoportal/world
09/14/99 11:12:40	284	admin	Verbose Javascript request.redirect called, database update won't happen
09/14/99 11:12:44	325	admin	Debug Javascript # user::set(extranet,Midwave)
09/14/99 11:12:44	325	admin	Debug Javascript # user::set(uiroot,/infoportal/world)
09/14/99 11:12:44	325	admin	Debug Javascript # user::set(cntroot,/extranet/Midwave)
09/14/99 11:12:44	325	admin	Information Javascript content root=/extranet/Midwave
09/14/99 11:12:44	325	admin	Information Javascript redirected to /infoportal/world
09/14/99 11:12:44	325	admin	Verbose Javascript request.redirect called, database update won't happen

Setting the Log View Length

This procedure sets how far back in time the log extends.

1. Click on the Logs menu.
2. Click on the View link.
   - The Log screen displays:

View: Log View last 4096 bytes

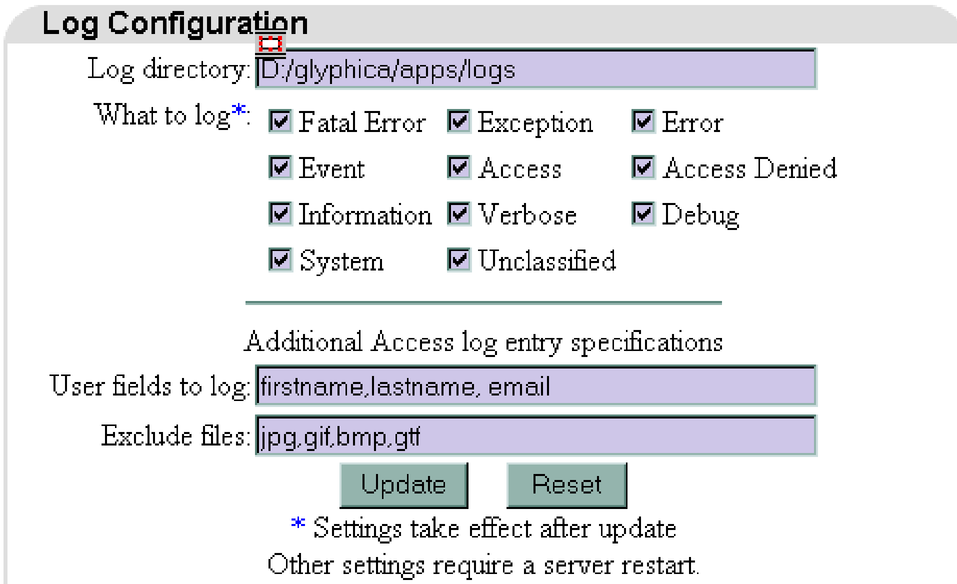
Date	Lvl	Module	Message
09/14/99 10:52:00	167	(system)	System fireJEvent::multiple_synchfire Ran one event
09/14/99 10:53:23	289	admin	Information Javascript Loading navbar nodes
09/14/99 11:12:34	325	admin	Information Javascript Loading navbar nodes
09/14/99 11:12:38	325	admin	Debug Javascript # user::set(extranet,Midwave)
09/14/99 11:12:38	325	admin	Debug Javascript # user::set(uiroot,/infoportal/world)
09/14/99 11:12:38	325	admin	Debug Javascript # user::set(cntroot,/extranet/Midwave)
09/14/99 11:12:38	325	admin	Information Javascript content root=/extranet/Midwave
09/14/99 11:12:38	325	admin	Information Javascript redirected to /infoportal/world
09/14/99 11:12:38	325	admin	Verbose Javascript request.redirect called, database update wo
09/14/99 11:12:40	284	admin	Debug Javascript # user::set(extranet,Midwave)
09/14/99 11:12:40	284	admin	Debug Javascript # user::set(uiroot,/infoportal/world)
09/14/99 11:12:40	284	admin	Debug Javascript # user::set(cntroot,/extranet/Midwave)
09/14/99 11:12:40	284	admin	Information Javascript content root=/extranet/Midwave
09/14/99 11:12:40	284	admin	Information Javascript redirected to /infoportal/world
09/14/99 11:12:40	284	admin	Verbose Javascript request.redirect called, database update wo
09/14/99 11:12:44	325	admin	Debug Javascript # user::set(extranet,Midwave)
09/14/99 11:12:44	325	admin	Debug Javascript # user::set(uiroot,/infoportal/world)
09/14/99 11:12:44	325	admin	Debug Javascript # user::set(cntroot,/extranet/Midwave)
09/14/99 11:12:44	325	admin	Information Javascript content root=/extranet/Midwave
09/14/99 11:12:44	325	admin	Information Javascript redirected to /infoportal/world
09/14/99 11:12:44	325	admin	Verbose Javascript request.redirect called, database update wo

3. Highlight the number in the View last...bytes text box.
4. Enter a new number. For active servers you may have to enter “50000” or a higher number to see an appreciable timeframe.
5. Click on the Log radio button.
   - The log view length changes. You will not see a change in the log view if you type a larger number and you are already viewing the entire log for that day.

Configuring Log Entries

This procedure configures what the system will log.

1. Click on the Logs menu.
2. Click on the Settings link.
   - The Log Configuration screen displays:



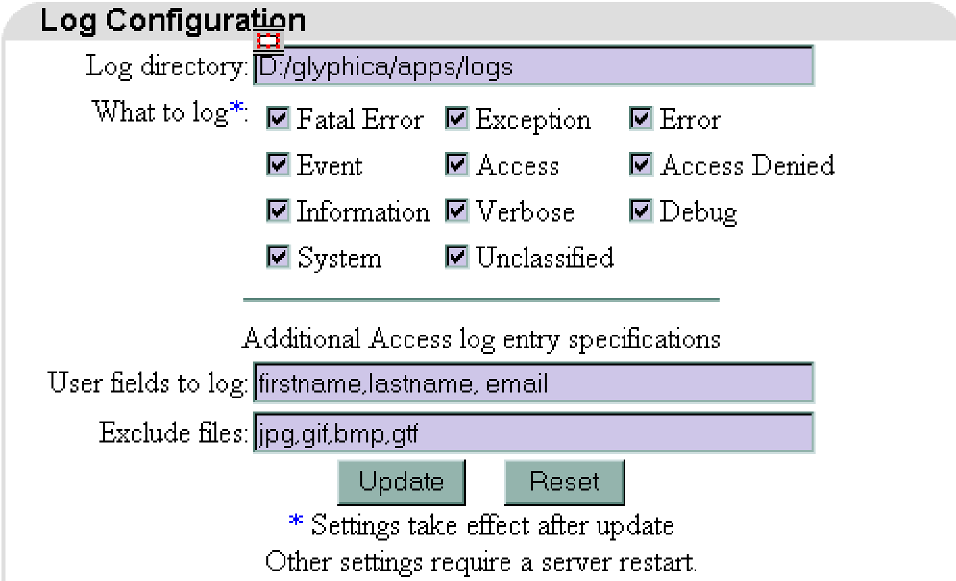
3. In the What to log section, click on the check boxes for any items you do not want to log.
   - If the box is checked, InfoPortal will log entries for that type.
4. If you want additional fields as entries in the Access log, type the field name in the User fields to log text box. Separate each field name with a comma.
5. If you want to exclude additional file types, type the three-letter extension in the Exclude files text box. Separate each extension with a comma.
   - Click on the Reset button if you want to revert to the previous information.
6. Click on the Update button.

Setting the Log Location

This procedure sets the directory where InfoPortal stores the log files. The default directory is where the InfoPortal software was installed, in /glyphica/apps/logs.

1. Click on the Logs menu.
2. Click on the Settings link.

- The Log Configuration screen displays:



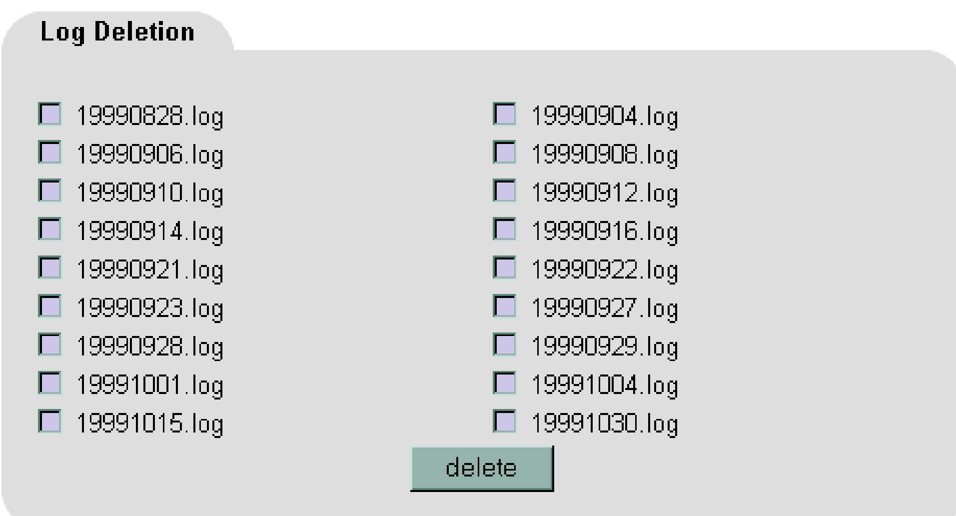
3. Enter the new directory path.
   - Click on the Reset button if you want to revert to the previous information.
4. Click on the Update button.

5.) Stop and restart the webserver (section 4.64)

Deleting Log Files

This procedure deletes individual log files.

1. Click on the Logs menu.
2. Click on the Delete link.
   - The Log Deletion screen displays:



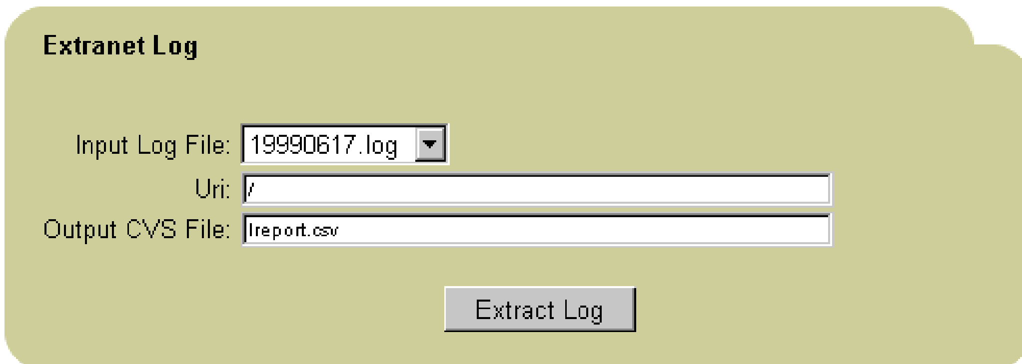
3. Click on the check boxes next to the log file you want to delete. You can select multiple files to delete.

4. Click on the Delete button.

Extracting an Extranet Log

This procedure extracts Extranet access information from a daily log file to a report file.

1. Click on the Logs menu.
2. Click on the Extranet link.
   - The Extranet Log screen displays:



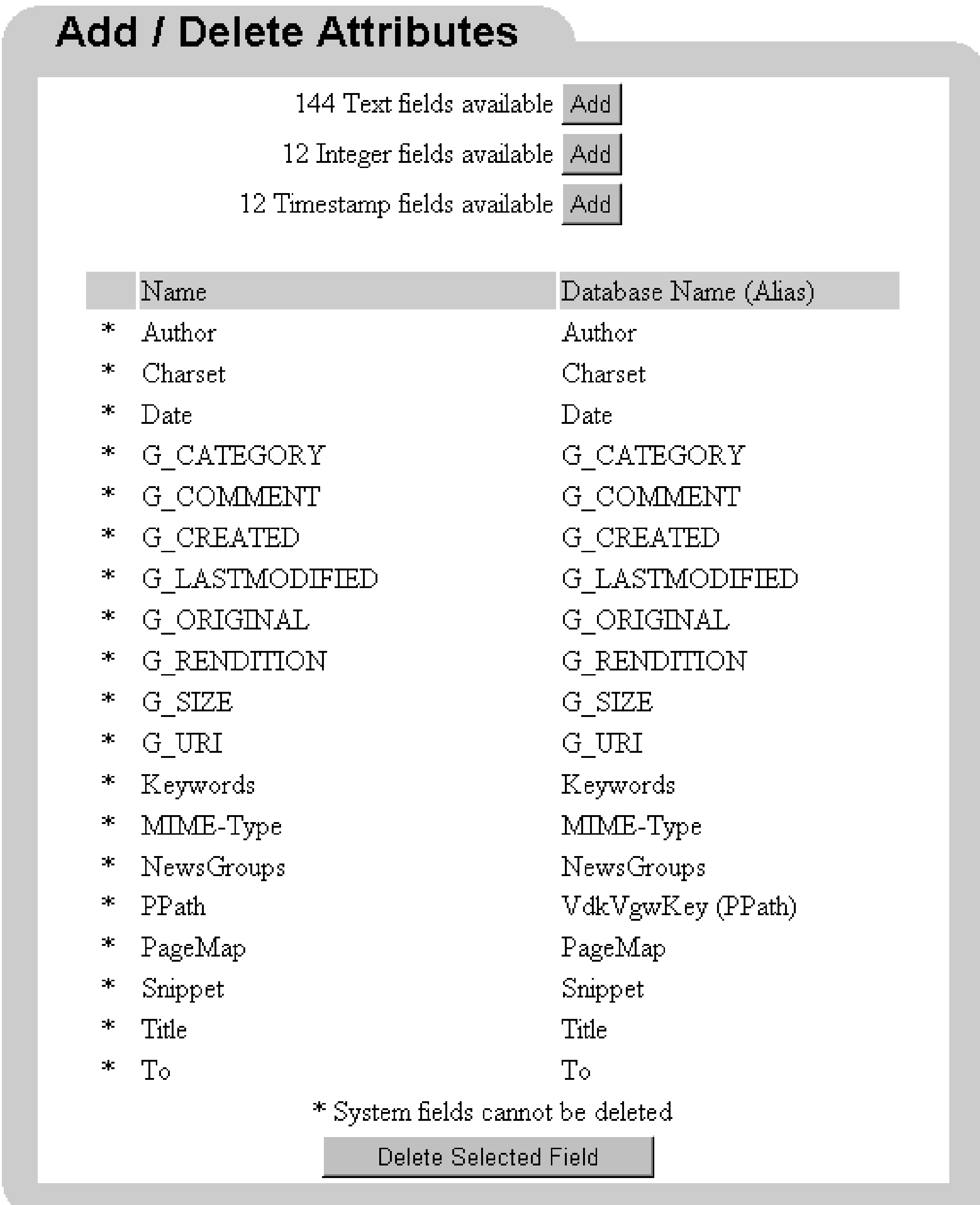
3. Select a log file from the Input Log File drop-down list.
4. Click in the Uri text box.
5. Enter the exact path to the required extranet (ie: /extranet/extranetname).
6. If you want a different report file name than the default (lreport.csv), highlight the text in the Output CVS File text box and type a new file name.
7. Click on the Extract Log button.
   - The file is extracted to the location of your other log files

Adding Attributes

This procedure allows the Site Administrator to add new metadata fields to the entire database. This feature is used by the Site Administrator to dynamically extend the system metadata. The Site Administrator specifies the field attributes. Once specified, the attribute is available for all documents and categories in the database.

1. In the Side Navigation Bar, click on the Attributes menu triangle to expand it.

2. Click on the Add/Delete link.
   - The Add/Delete Attributes screen displays:



Note:

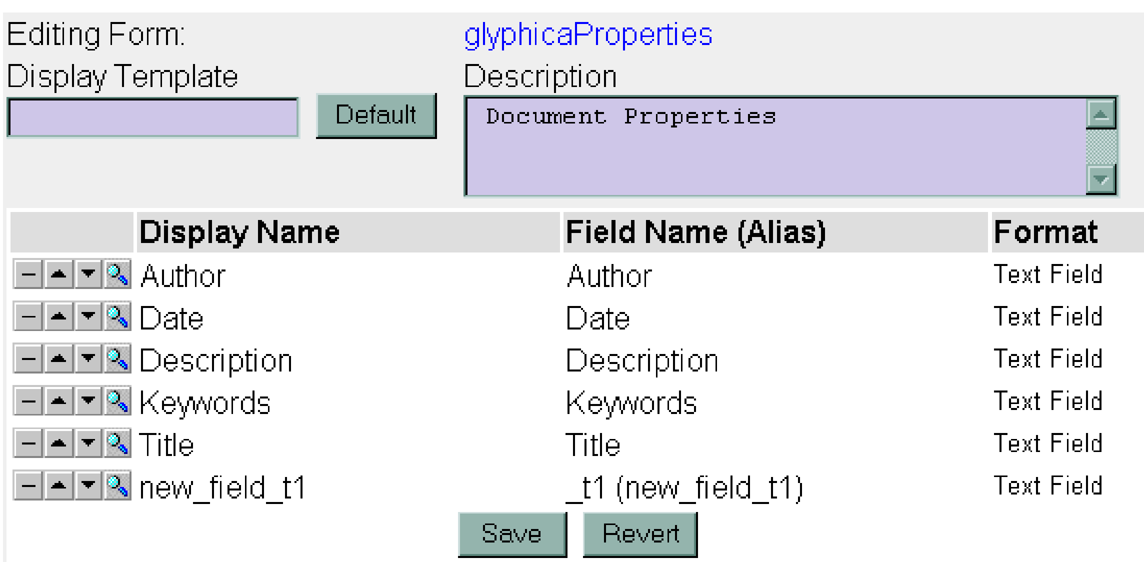
InfoPortal includes certain system-defiend default metadata fields.

3. Decide what type of attribute field you want to add: Text, Integer, or Timestamp.

Field Enter	Explanation
Text	Alphanumeric characters are allowed in this field.
Integer	Only integers are allowed in the field. Any other number entered is automatically rounded down to the nearest integer. Text entered in the field results in an error message.
Timestamp	A date entered in the field is automatically formatted as YYYY/MM/DD HH:MM:SS

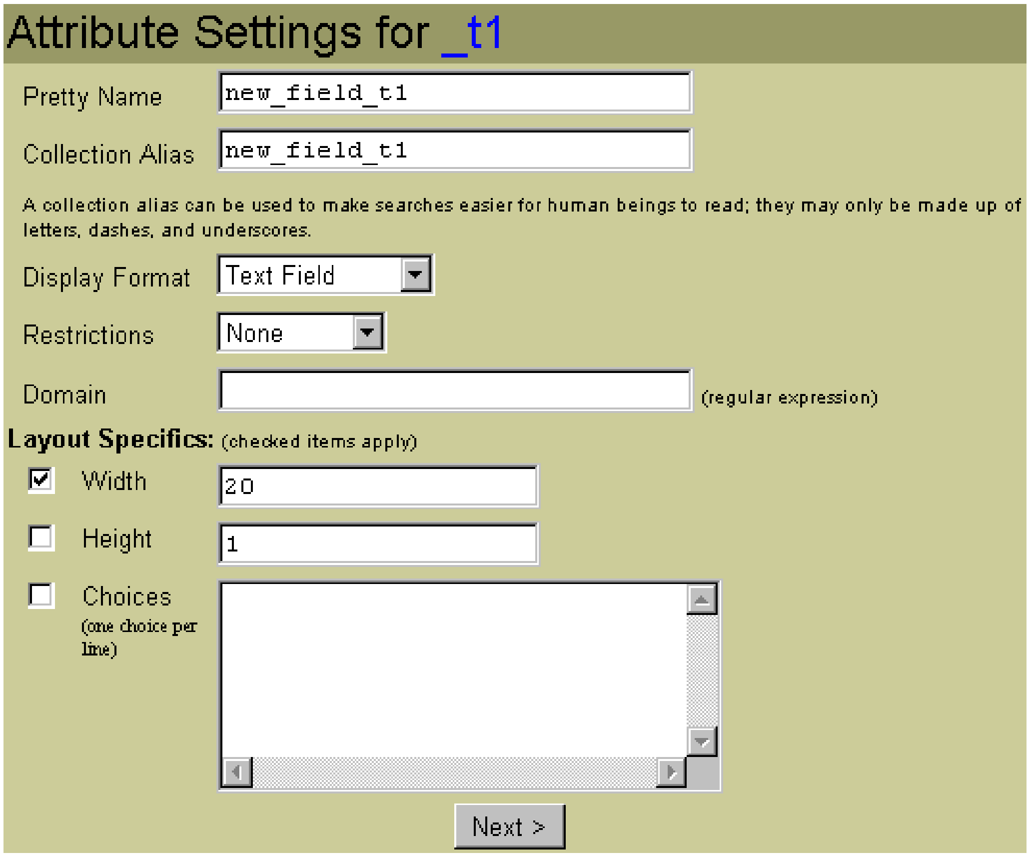
4. Click on the appropriate Add button.
   - The Added Attribute screen displays:

   - This screen confirms that a metadata field was created.
5. Click on Next.
   - Once you've selected add an atttribute, that attribute has been added. You must configure it and save your changes to its configuration, or it will appear with system defaults.
   - The Editing Attributes Form screen displays with the new field at the bottom of the list (the following figure shows only the top section of the screen):



6. Click on the to the left of the new field name to configure the field.

- The Attribute Settings screen displays:

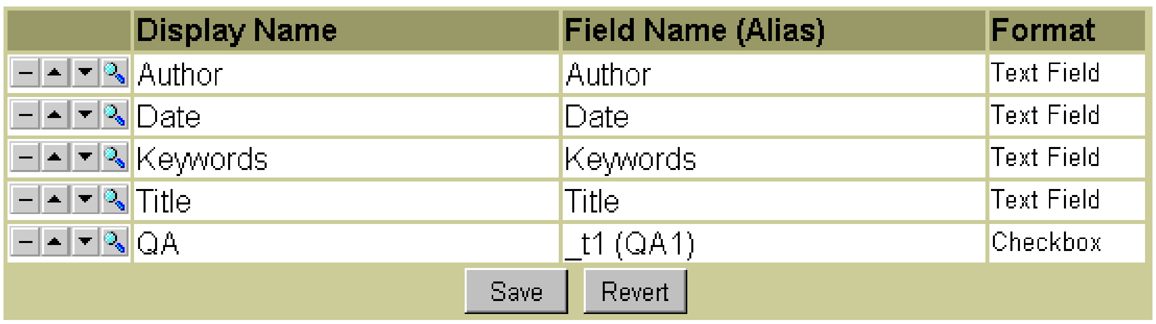


7. In the Pretty Name field, enter the name you want the InfoPortal interface to display.
8. Enter a shortcut name in the Collection Alias field.
   - A collection alias can be used to make searches easier for users; they may only be made up of letters, dashes, and underscores (no spaces or odd characters). Collection Alias is the name that is used to sort metadata, and is also used for building queries when performing searches.
   - The Collection Alias and the Pretty Name do not to be identical.
9. Select a field format from the Display Format drop-down list.
   - The options are: Check Box, Password, Radio Buttons, Select, Multiselect, Text Field, and Text Area.

Format	Result
Check Box	Creates a check box.
Password	Creates a text box for entering a password. These are case sensitive, and are encrypted into asterisks (*) as each letter is entered.
Radio Buttons	Creates a "select one only" list of radio buttons. Button choices are controlled by the Choices field.
Select	Creates a drop-down list of selections. The selection choices are controlled by the Choices field. If Height is set to 1, the result will be a drop-down box. If Height is set to >1, the field is displayed as a list.
Multiselect	Multiselect works like the select box in that it creates a drop-down list of choices. However, the multiselect box enables users to select more than one option within that selection box.

Format	Result
Text Field	Creates an empty single-line text box.
Text Area	Creates a larger, multi-line text box.

10. Select a restriction from the Restrictions drop-down list.
    - The options are: None, Read Only, and Required.
11. Enter a regular expression in the Domain field, if required. Regular expressions my be used to control where an attribute is exposed.
12. Click on the appropriate check boxes in the Layout Specifics section.
13. Enter the appropriate text in the fields next to the check boxes that are checked.
14. Click on Next.
    - The configured metadata field displays in the Editing Form:



Display Name	Field Name (Alias)	Format
Author	Author	Text Field
Date	Date	Text Field
Keywords	Keywords	Text Field
Title	Title	Text Field
QA	_t1 (QA1)	Checkbox

Save Revert

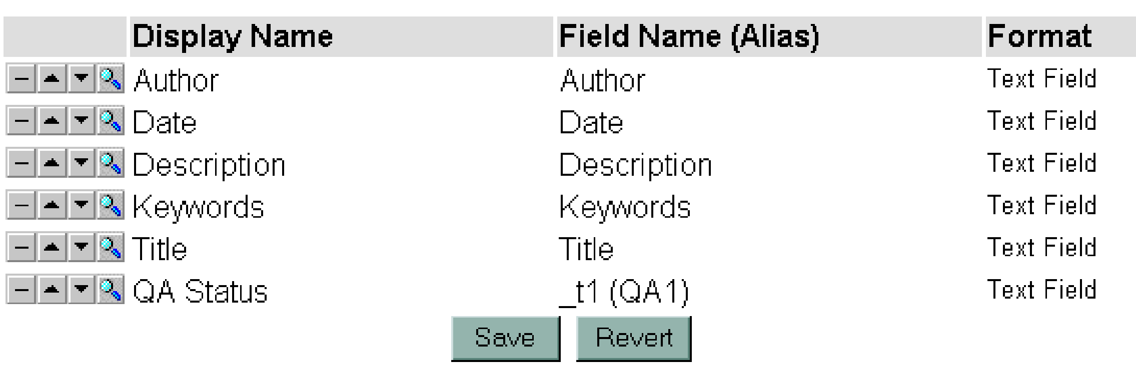
15. Click on the Save button.
    - The Editing Form disappears from the screen and you are taken back to the Collection Information screen.

Modifying Attributes

This procedure allows the Site Administrator to modify the values of existing metadata fields. You cannot modify System-created metadata fields.

1. In the Side Navigation Bar, click on the Attributes menu triangle to expand it.

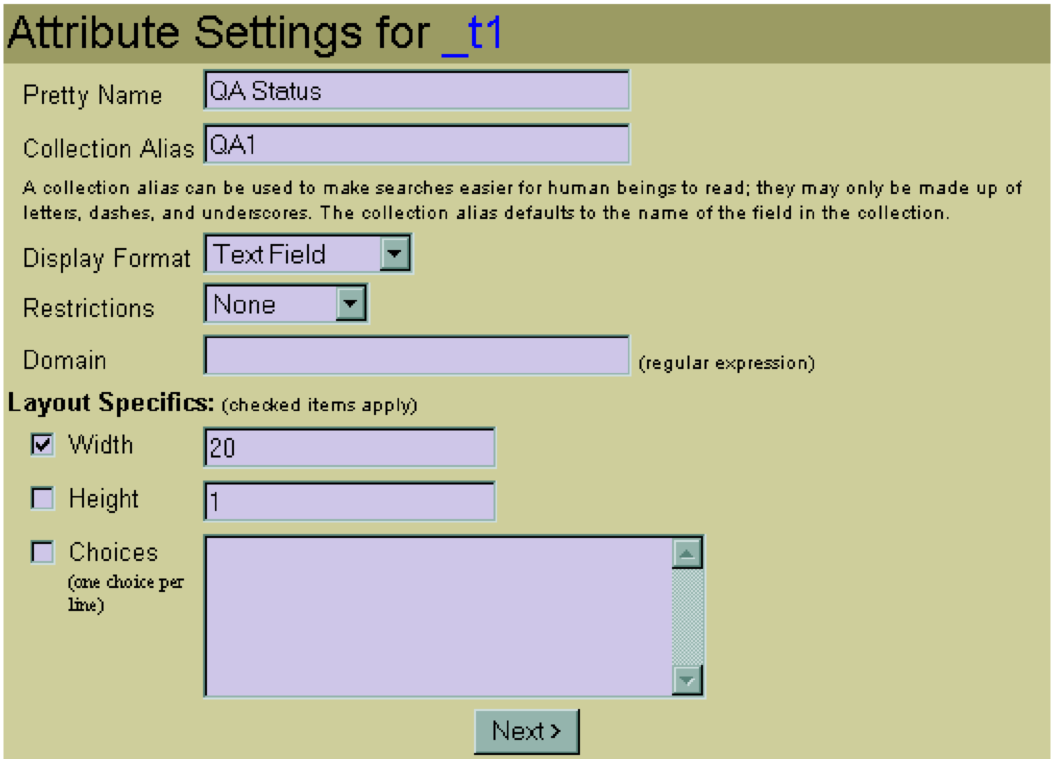
2. Click on the Modify link.
    - The Modify Attributes screen displays:



Display Name	Field Name (Alias)	Format
Author	Author	Text Field
Date	Date	Text Field
Description	Description	Text Field
Keywords	Keywords	Text Field
Title	Title	Text Field
QA Status	_t1 (QA1)	Text Field

Save Revert

3. Click on the to the left of the field name you want to change.
   - The Attribute Settings screen displays:



4. Make the appropriate changes. (See “Adding Attributes” for details concerning this function).
5. Click on Next.
   - The new configuration displays in the Edit Form screen:

	Display Name	Field Name (Alias)	Format
	Author	Author	Text Field
	Date	Date	Text Field
	Keywords	Keywords	Text Field
	Title	Title	Text Field
	QA Status	_t1 (QA1)	Radio Buttons

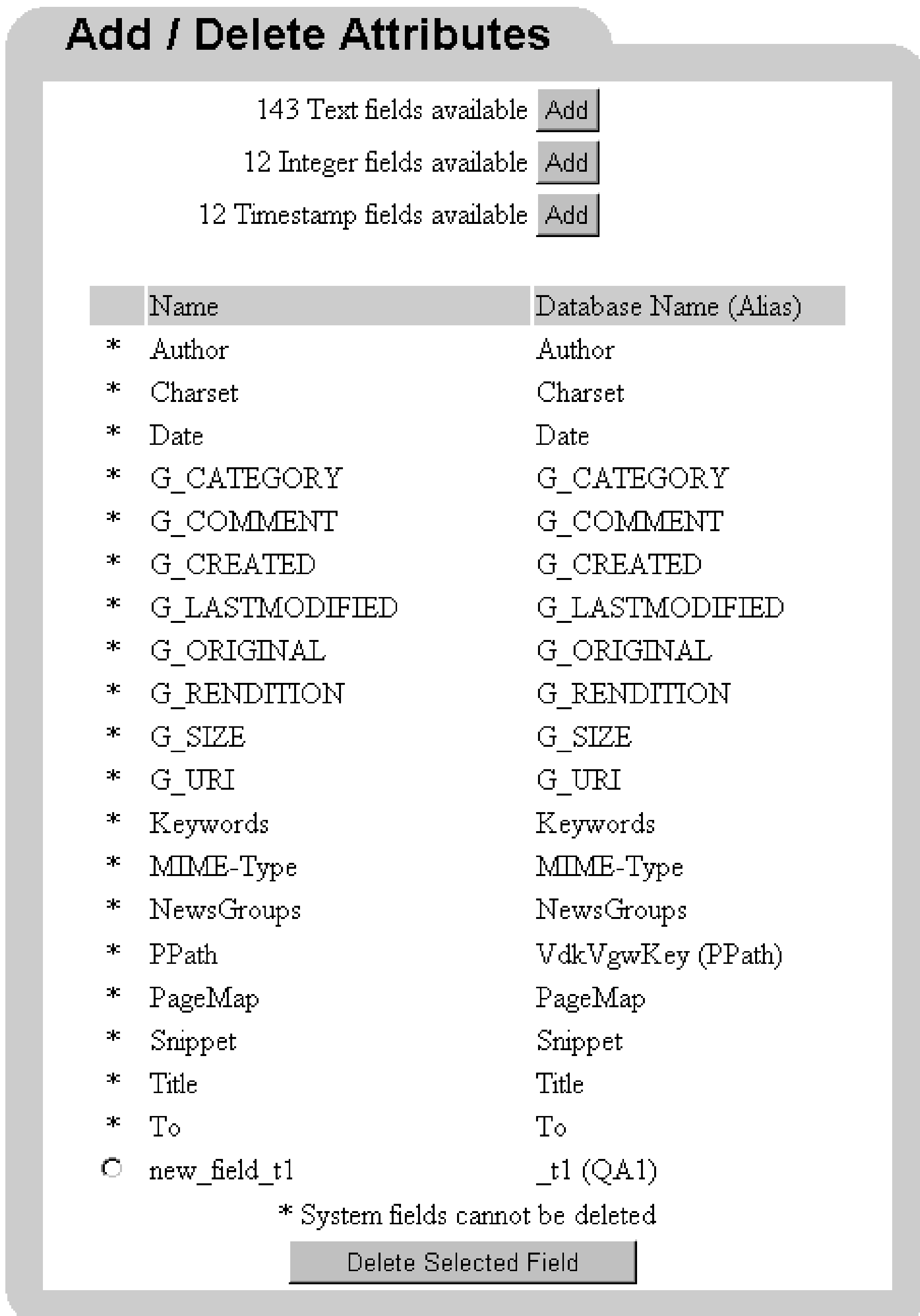
Save Revert

6. Click on the Save button.
   - The Editing Form disappears from the screen and you are taken back to the Collection Information screen.

Deleting Attributes

This procedure deletes a non-system metadata field from the entire database. System fields cannot be deleted. **Note: deleting a metadata field from the database removes all associated information in that field for all documents presently in the system and removes it from the search index**. Therefore, deleting a a field that is referenced in a search or metadata display elsewhere in the Portal may cause unpredictable results. Before deleting a field, be sure to check to see that this removal will not affect the functioning of the search, search display, and category views within the Portal.

1. Click on the Attributes menu.
2. Click on the Add/Delete link.
   - The Add/Delete Attributes screen displays:



3. Click on the radio button for the attribute you wish to delete.
4. Click on the Delete Selected Field button at the bottom of the screen.
5. A warning appears asking if you are sure you want to delete the field
6. Click Yes
   - The field is removed from the list.

Changing the Order of Attributes

The Administrator can change the order in which metadata items appear in the list (both in the Administration view and in the corresponding forms, such as the Add Document view).

Table 1:

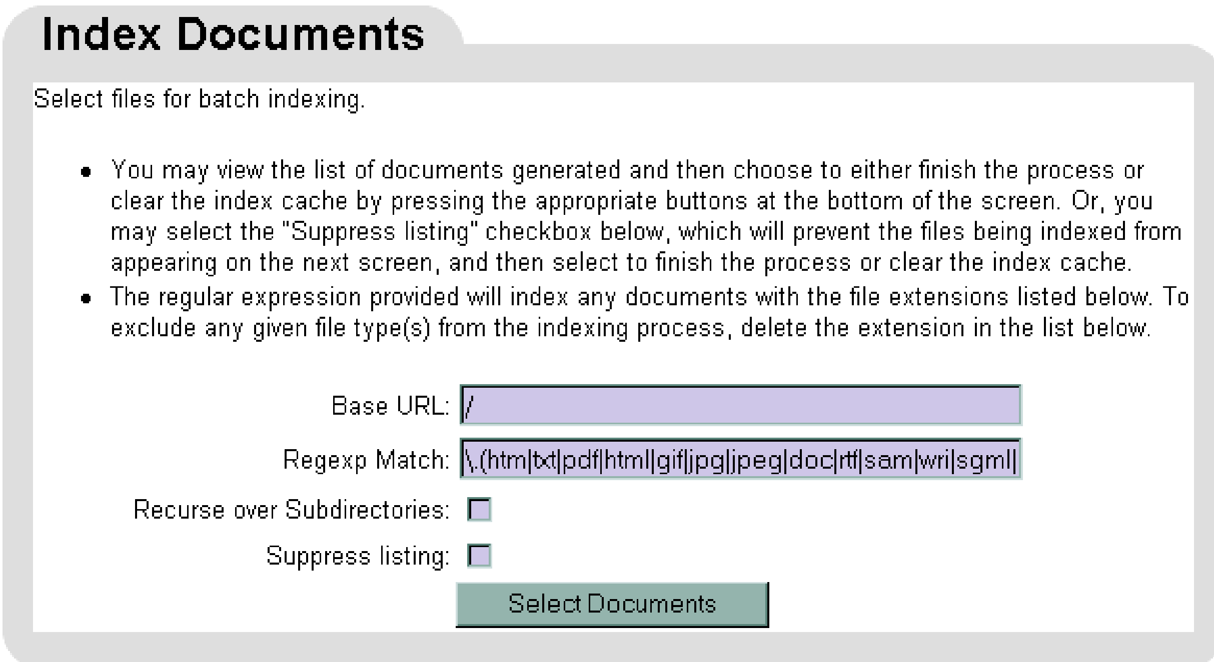
Icon	Function
	Removes attribute from form
	Moves attribute up one line
	moves attribute down one line
	Opens Edit Attribute screen

To move an attribute up or down, select the appropriate button next to the attribute. To move an attribute up five positions in the list, you must push the button five times. The screen will refresh after each action. You must SAVE the attribute set after you have completed moving the attribute.

Batch Indexing Documents

This procedure indexes a group of documents. InfoPortal will recognize and organize the documents and metadata (if any) that is associated with them.

1. Click on the Batch Operations menu.
2. Click on the Index link.
   - The Index Documents screen displays:



3. Click in the Base URL text box.
4. Enter the URL where the documents to index are located.
5. If you want to exclude any file type(s) from the indexing process, highlight and delete the extension(s) in the Regexp Match text box. Likewise, if you wish to add any file types, add their extension after a pipe but within the parentheses of the expression.
6. Click in the Recurse over Subdirectories check box if you want to include files in subdirectories of the URL in the Base URL field.
7. Click the supress listing box if you do not want to to see a list of the documents that InfoPortal is preparing to index.
8. Click on the Select Documents button.

Note

Depending on the number of documents being indexed, and their size, this process could take anywhere from several seconds to some minutes (hours, in extreme cases). Do not perform large Batch Index processes during heavy usage times.

- The Selected Files list displays: (if supress listing has not selected)

Selected Files

Scanned documents from /.

The bulk insert data structure currently contains:

d:\glyphica\docs
Charset 850
G_LOID 0007000000001c25
G_ORIGINAL /horn.gif
G_RENDITION
G_URI /horn.gif
MIME-Type image/gif
PPath d:\glyphica\docs\horn.gif
PageMap 0x
d:\glyphica\docs\.indexed
G_LOID 0007000000000f14
G_URI /
MIME-Type text/x-empty
PPath d:\glyphica\docs\.indexed
PageMap 0x
d:\glyphica\docs\horn.gif
Charset 850
G_LOID 0007000000001c25
G_URI /horn.gif
MIME-Type image/gif
PPath d:\glyphica\docs\horn.gif
PageMap 0x

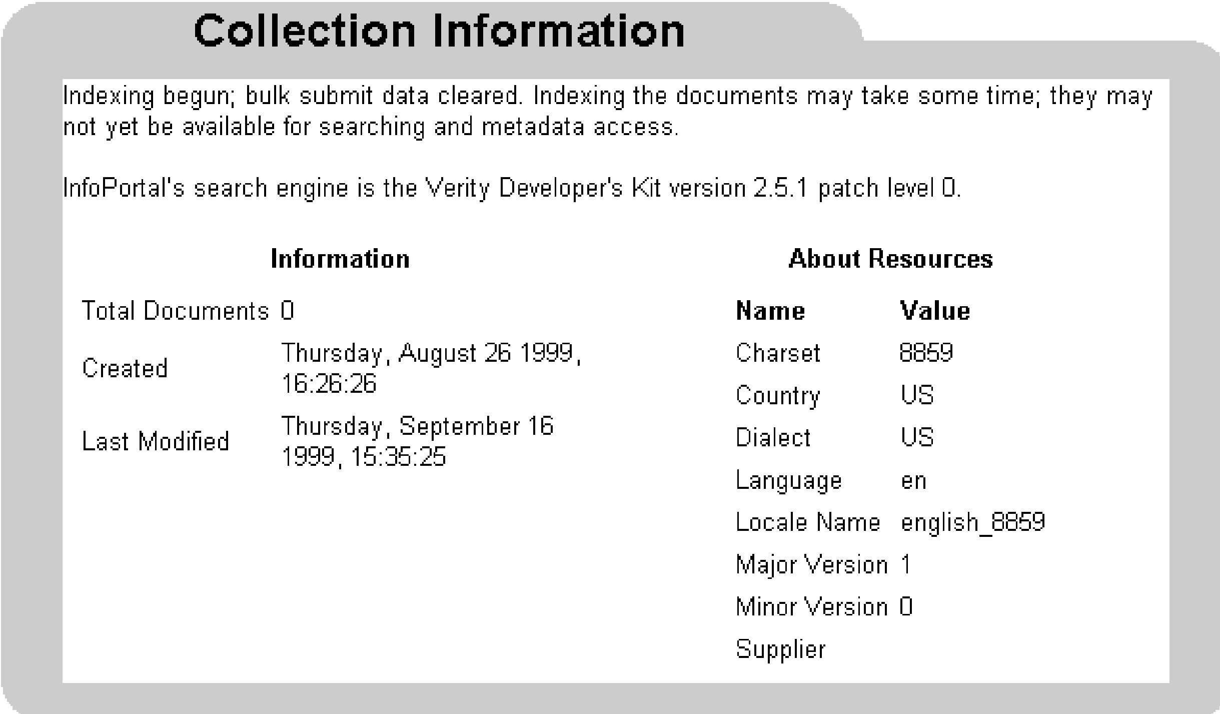
[Index Selected Documents] [Clear Bulk Insert Data]

9. If the documents listed are not correct, click on the Clear Bulk Insert Data button and modify the document path.
10. If the documents listed are correct, click on the Index Selected Documents button.

Note

Do NOT use the Back button to restart the Select Documents process. Clear first, then restart the process. Otherwise, the original incorrect data will be held in memory.

- The Collection Information screen displays with messages telling you when indexing begins.

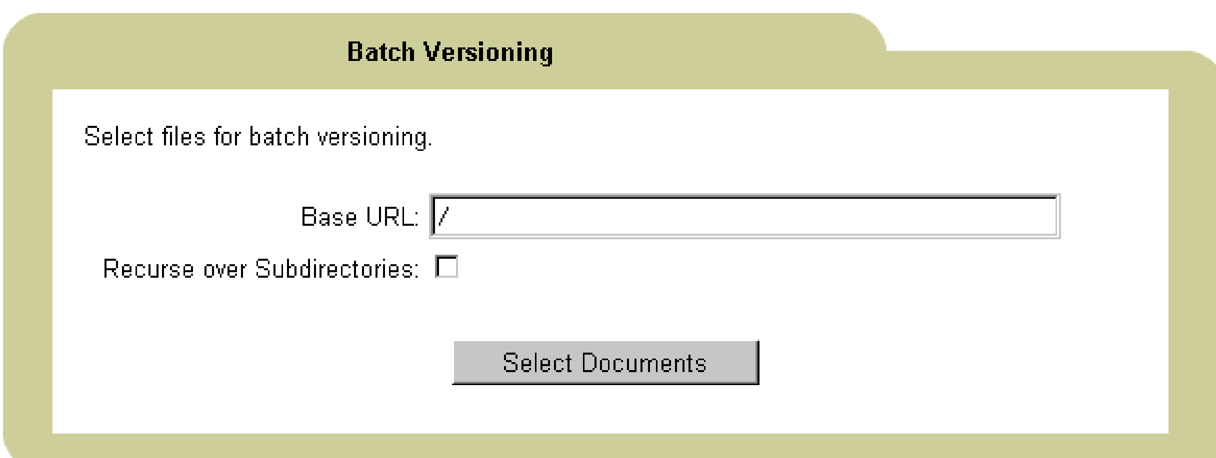


- Depending on the number of documents, this process may take some time. for windows NT users, you can watch the CPU utilization on the server using Task Manager. CPU utilization will run near 100% until indexing is complete.

Batch Versioning Documents

This procedure creates a version history for a group of documents.

1. Click on the Batch Operations menu.
2. Click on the Version link.
   - The Batch Versioning screen displays:



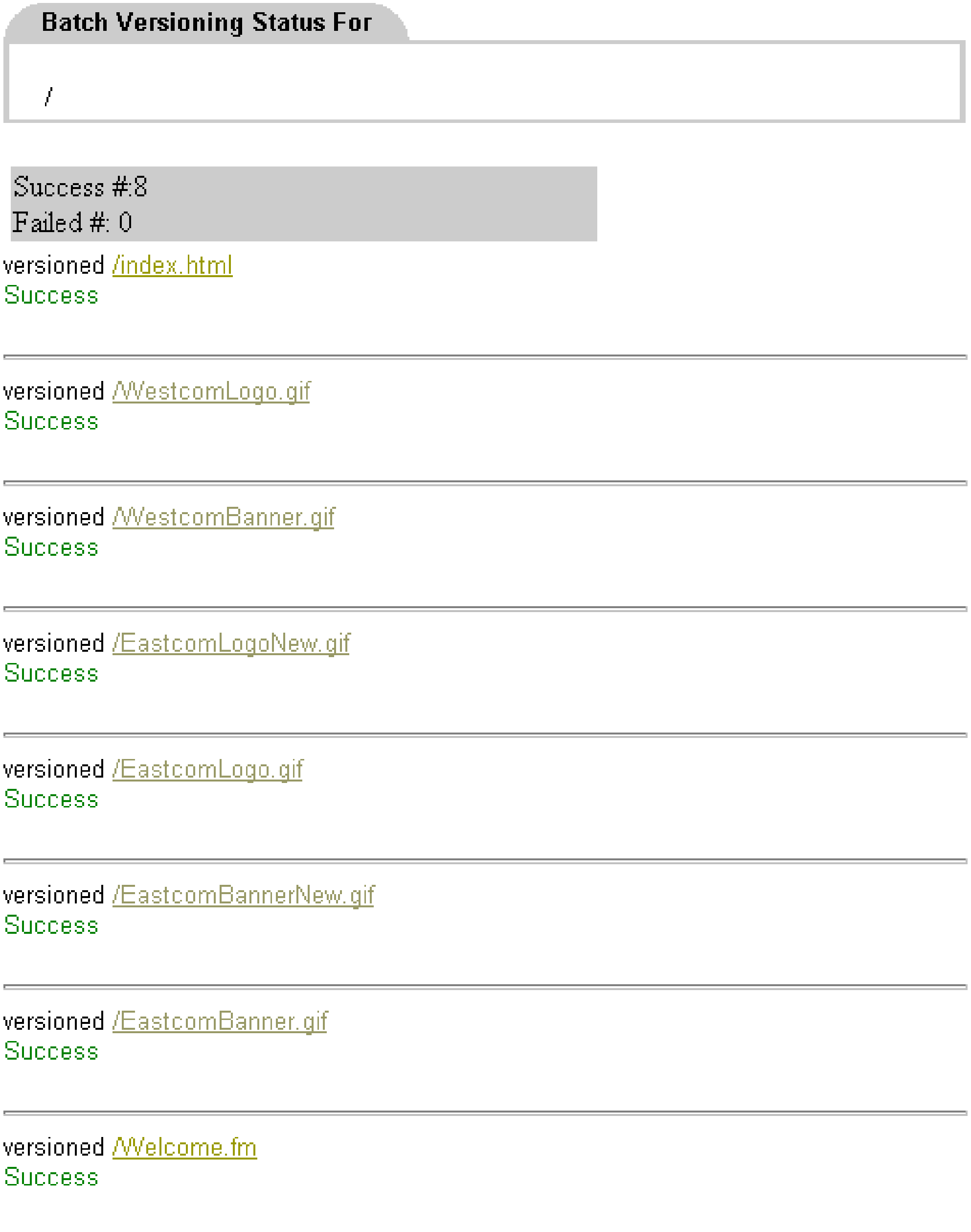
3. Click in the Base URL text box.

4. Enter the URL where the documents for batch versioning are located. (Example: /Sales/Contacts)
5. Click in the Recurse over Subdirectories check box if you want to include files in subdirectories of the URL in the Base URL field.
6. Click on the Select Documents button.
   - The Batch Versioning Preview screen displays.

- You may uncheck any documents you do not wish versioned at this time.

7. Click on the check box to the left of the file name for files you do not want placed under version history control.
8. Click on the Version button.

- The Batch Versioning Status screen displays to show the success/failure of the versioning process:



Importing Documents and Metadata

This procedure imports large databases of documents into InfoPortal from an existing document management system or document inventory. The procedure consists of two parts:

- Creating a spreadsheet for the documents and exporting it to a tab- or comma-delimited text file
- Importing the metadata for the documents

Preparing for Import

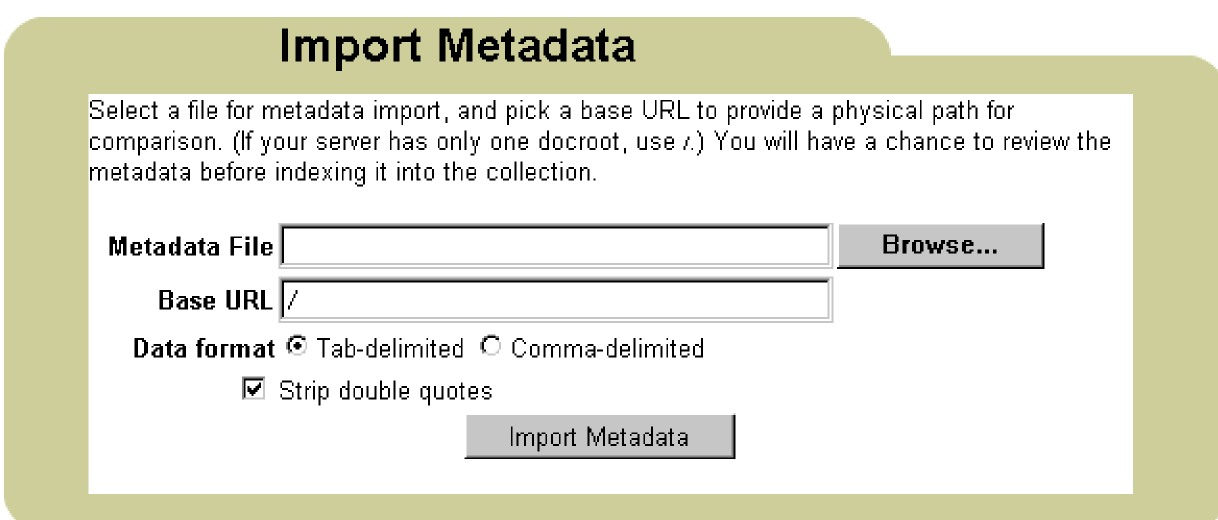
To prepare for metadata import, you create a tab- or comma-delimited text file or spreadsheet (with the .txt extension) from the database.

1. Determine the names of the metadata fields to be imported.
2. Add the fields to the InfoPortal database. The collection Alias should match the column headings in the spreadsheet (or visa versa).
3. Place the documents to be indexed into the file system folders where they will reside in the InfoPortal.
   - Use Windows NT Explorer or another file management system to do this. DO NOT use the Add Document function in InfoPortal or WebDAV.
4. Create a spreadsheet containing the metadata.
   - You can do this manually or from an existing database. The column headings should correspond exactly to the field names as set up in the InfoPortal. For example, a Collection Alias called Country_Name in the InfoPortal must be mapped to a column in the spreadsheet called Country_Name. Note that this must be the Collection Alias, not the “pretty” (display) name. The import will not work if the names do not match *exactly*.
5. Create all the pertinent metadata fields.
6. The first column in the spreadsheet should be called Filename.
7. Place the full document path and filename in this column for each document.
8. Export the spreadsheet to a tab-delimited text file on the InfoPortal server.
   - The file should be stored outside of the document root directory, but must be on the same server as the InfoPortal installation. Save the file as tab-delimited text when exporting.

Importing metadata

After you create the tab-delimited text file from the database for the documents, you use InfoPortal to import the metadata.

1. Click on the Batch Operations menu.
2. Click on the Import link.
   - The Import Metadata screen displays:



3. Click on the Browse button.

4. Select the metadata file.
5. Set a base URL.
    - Use the / to index documents in the root document directory. Otherwise, specify a server directory. If the server contains multiple document directories and/or subdirectories, enter a path that will directly point to the documents to be indexed.
    - You need to use something other than a base URL only if you have a nametrans (Netscape) or a virtual directory (IIS).
6. Click on the Tab-delimited radio button in the Data format field if it is not already selected unless the imported metadata is in comma-delimited format.
7. Click on the Strip double quotes check box in the Data format field if it is not already selected.
    - This can prevent problems in the data that could be caused by quotation marks in the spreadsheet.
8. Click the supress listung check box to avoid viewing a list if documents being imported (recomended for imports).
9. Click on the Import Metadata button.
10. Check the resulting Selected Files screen to make sure that the data to be imported into the specified fields is correct, and that the paths to the documents is correct.
    - Check especially for places where a failure to place double backslashes in the path has resulted in an incorrect path.
11. If the information in the Selected Files screen is correct, click on the Index Selected Documents button.
    - Indexing begins immediately.
12. If the information in the Selected Files screen is incorrect, click on the Clear Bulk Insert Data button and troubleshoot the spreadsheet.

Note

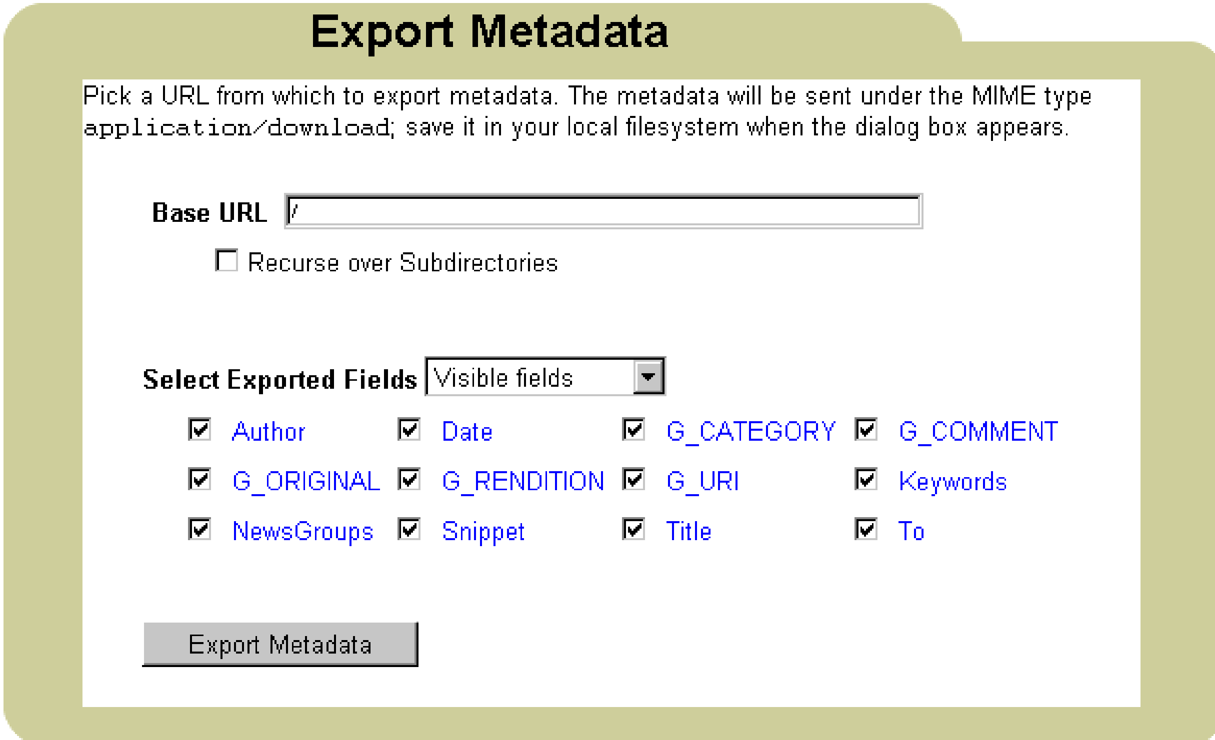
Do NOT use the Back button to clear the bulk insert data. Use the Clear Bulk Data button first, then restart the process. Otherwise, the original incorrect data will stay in memory.

Exporting Metadata

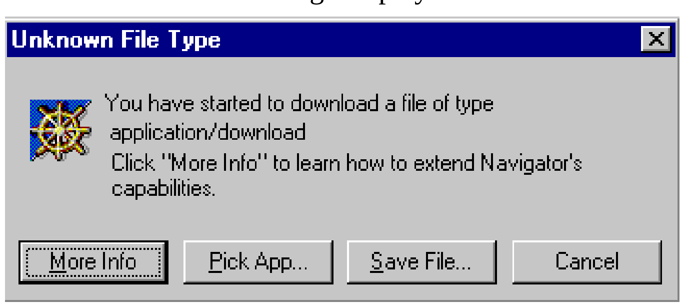
This procedure exports metadata from the system for use in reporting or importing into other processing systems. You can select the fields to export.

1. Click on the Batch Operations menu.
2. Click on the Export link.

- The Export Metadata screen displays:

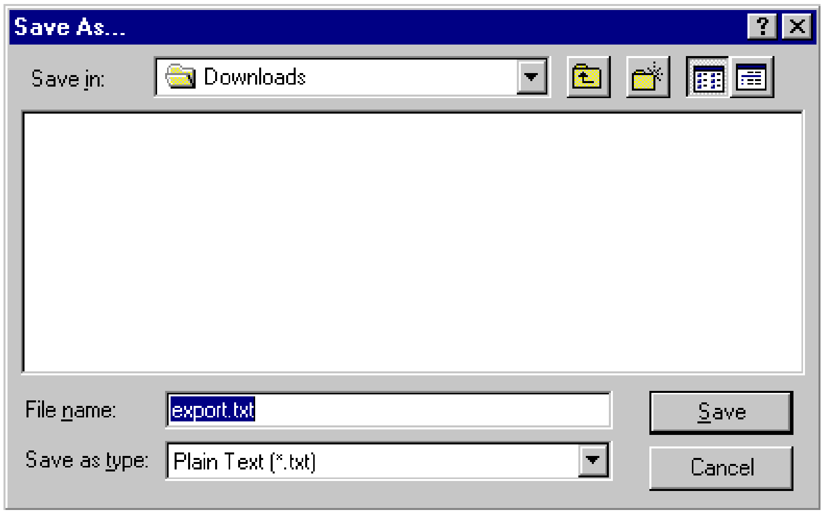


3. Enter the directory for the Base URL.
   - If you choose the default, metadata will be exported for the directory corresponding to the Base URL for the InfoPortal and all files in that directory. As another example, /Countries/China will export only the data for the group of documents listed in the Countries/China sub-Category.
4. Click on the Recurse over Subdirectories check box.
5. This forces the export engine to include metadata included in subdirectories of the Base URL.
6. Click on the Select Exported Fields drop-down list.
7. Select a subset to export.
   - Options: Visible fields, Writable fields, Mandatory fields.
8. Click on the check boxes to uncheck any of the metadata fields you do not want to export.
9. Click on the Export metadata button.
   - A browser message displays:



10. Click on the Save File button.

- The Save As dialog displays:



11. Select the location to save the file.
12. Click on the Save button.
    - The system saves the file in the location you specify. Then you can use it to re-import into the system or manipulate the data for reporting or analysis.

Deleting a Web Link

This procedure removes an existing Web Link from the InfoPortal. Any users with the proper permission to the directory containing the Web Link can delete them. This procedure is performed in the Content Publishing view.

1. Select Content Publishing from the Top Navigation Bar.
2. Navigate to the Web Link location on the InfoPortal.
3. Click on the Web Link icon to select it:

4. In the Side Navigation Bar, click on the Edit menu triangle to expand it.

5. Click on the Delete link.
    - A confirmation message displays:

6. Click on the OK button.
   - The Web Link is removed.

Adding Mailbox Forwarding

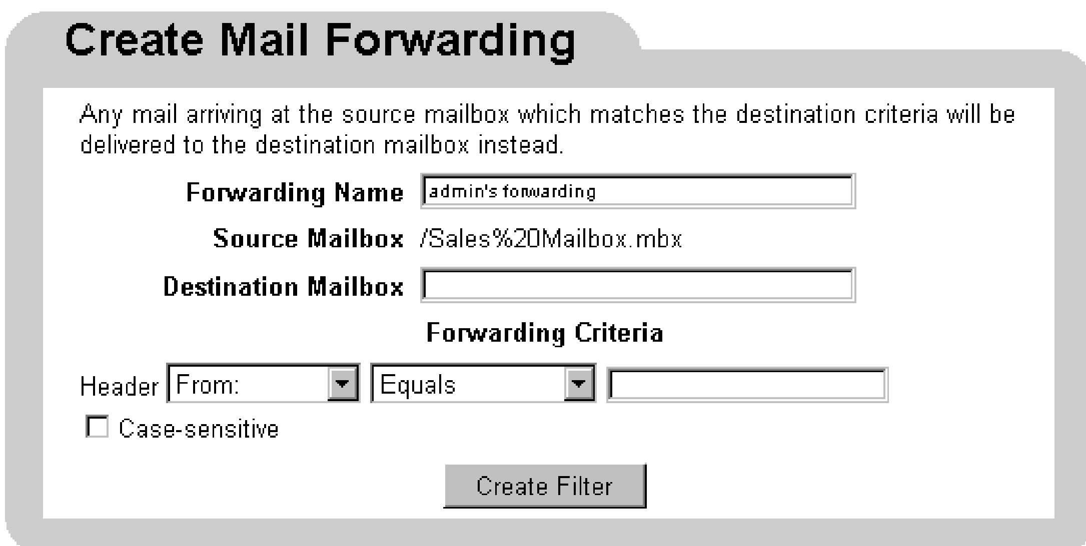
Mailbox Forwarding acts as a filter, making sure that the contents (emails and attachments) are routed to the appropriate mailbox.

This procedure configures the criteria by which mail will be forwarded from a selected mailbox to another mailbox.

1. Navigate to the directory in which the Mailbox folder is located.
2. Click on the Mailbox folder to select it.

3. In the Side Navigation Bar, click on the Mailboxes menu triangle to expand it.

4. Click on the Add Forwarding link.
   - The Create Mail Forwarding screen displays:



5. Change the text in the Forwarding Name field if you wish.
   - The Source Mailbox field is read-only; the data shown here is the filename of the Mailbox Folder you selected in Step 2.
6. Enter the directory path and filename of the mailbox to which you are going to forward mail in the Destination Mailbox field.
7. Click on the first Header drop-down list and select the message header criteria. The following are the header elements you can select:
   - From, To, Subject, Sender, Reply-To, CC, Mailing-List
8. Click on the next drop-down list to the right and select a comparison operator. The following are the available choices:
   - Equals, Does not Equal, Contains, Begins, Ends
9. Enter Forwarding Criteria text in the text box to the right of the two drop-down lists.

10. Click in the Case-sensitive field if you want the Forwarding Criteria to be case-sensitive (that is, “Criteria” is considered to be different than “criteria”).
11. Click on the Create Filter button.
    - A confirmation message displays:

      Created filter named 'marketing forwarding'.

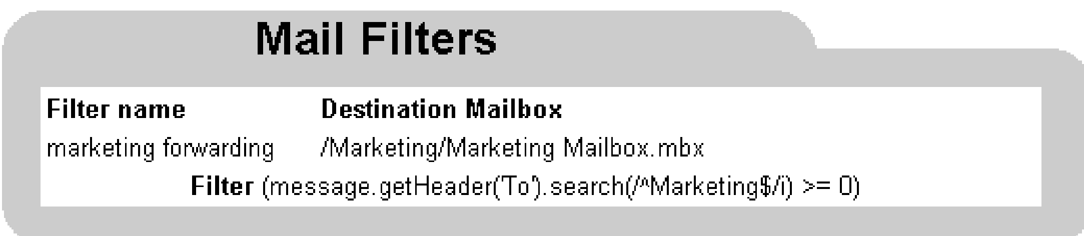
Viewing Mailbox Forwards

This procedure displays the Mail Filters screen, a read-only screen that lists the current mail forwarding criteria set for a selected Mailbox folder. Only the Site Administrator can change the mail forwarding criteria once it is set up.

1. Click on a Mailbox folder icon to select it.

2. Click on the Mailboxes menu triangle to expand it.

3. Click on the View Forwards link.
    - The Mail Filters screen displays:



- This screen displays the name of the filter, the location to which mail is forwarded (Destination Mailbox), and the Forwarding Criteria that has been implemented (Filter).

Starting a New Discussion

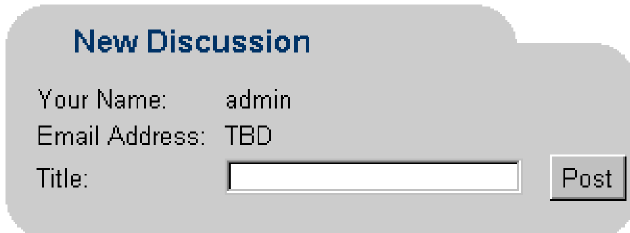
Discussion Groups are a place for Content Publishers to hold threaded forums on relevant topics. They are created inside Category folders, and are treated as content within those folders; these discussions are searchable and any documents attached to postings within the discussions are also searchable as part of the system content.

This procedure creates a Discussion folder on your Portal. Only Site Administrators and Account Administrators can create new Discussion folders. While this is discussed as a site Adminisrtator function, the site Administrator or Account manager must be in Content publishing mode to use this function.

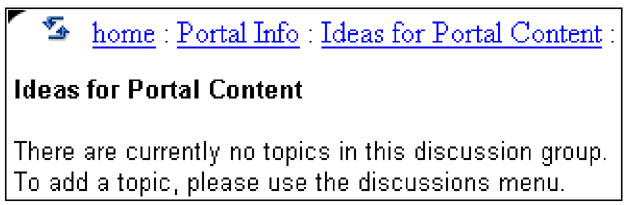
1. Select Content Publishing from the Show drop-down list.
2. Navigate to where you want to locate the Discussion folder.

3. In the Side Navigation Bar, click on the File menu triangle to expand it.

4. Click on the Discussion link.
   - The New Discussion screen displays:



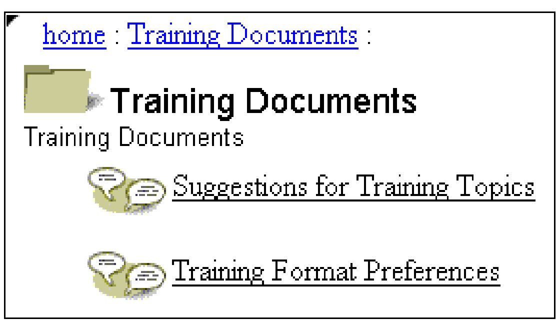
5. Enter the title of the Discussion in the Title text box.
6. Click on the Post button.
   - The discussion folder is created in the current directory:



Deleting a Discussion Message

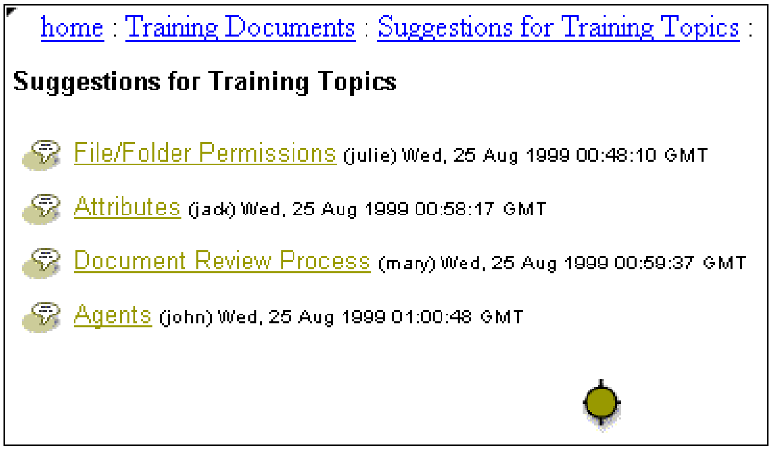
This procedure removes an existing Discussion Response message and attachment, if any, from the Discussion Window. Only Site Administrators can delete messages and attachments.

1. Navigate to the appropriate Discussion Group folder:

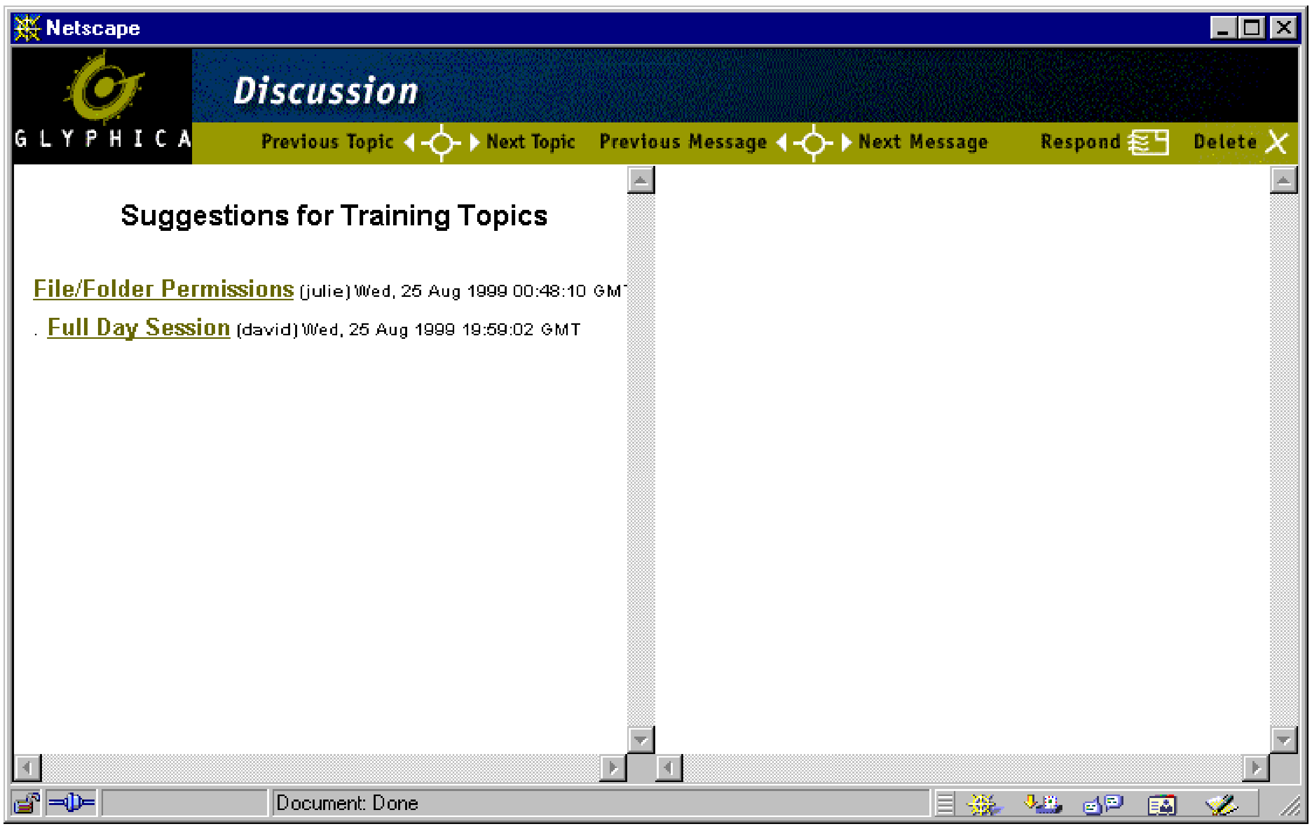


2. Click on the appropriate Discussion folder link.
   - Alternatively, you can view all discussions and click on the appropriate Discussion title link. See “Viewing a List of All Discussions,” page 3.63 for details.

- The Discussion Group topics display:

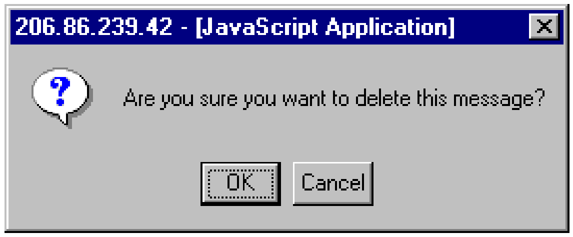


3. Click on the topic link containing the message you want to delete.
   - The Discussion window displays:

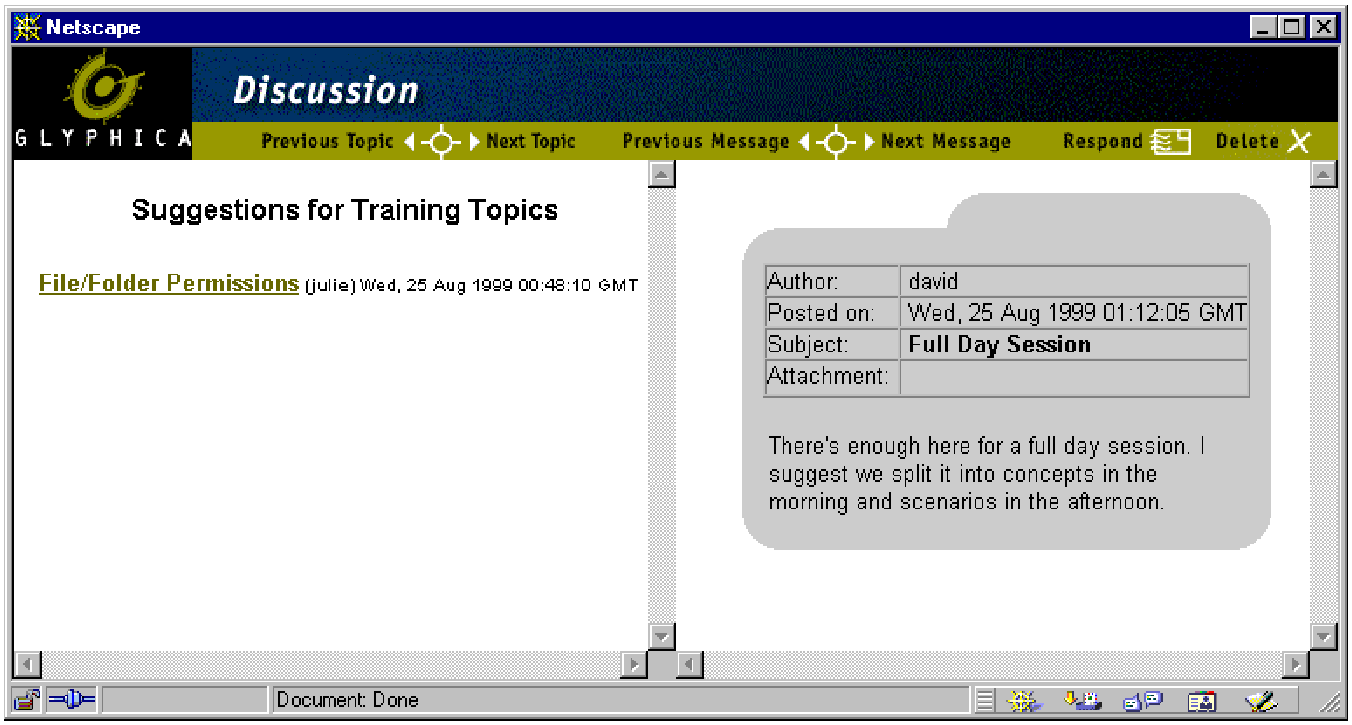


4. In the left-hand window, click on the link for the message you want to delete.
5. The message content displays in the right-hand window.
6. Click on the Delete button  in the Navigation Bar.

- A confirmation message displays:



7. Click on the OK button.
   - The message is deleted. The attachment, if any, is also deleted.
   - The message link is removed from the left-hand window:



- Even though the message text remains in the right-hand window, the message is in fact deleted from the Discussion Group. (You can verify this by clicking on the Next Message button, then the Previous Message button in the Navigation Bar).