

PORTALS

ADMINISTRATION TOOL

TABLE OF CONTENTS

WHAT IS A PORTAL?	5
MANAGING PORTALS	6
Creating a portal.....	6
Modifying a portal.....	6
Deleting a portal.....	6
Duplicating a portal	7
Exporting a portal.....	7
Importing a portal	8
CONFIGURATION OPTIONS OF A PORTAL.....	9
Types of layout	9
Predefined layout.....	9
Customized layout.....	10
Types of contents	11
Selecting a type of content.....	11
Types of contents available	11
Public portal/Default public portal	13
Portal assignments	14

WHAT IS A PORTAL?

A portal is a **homepage** for Gargantua Web Client. Composed of one or more areas, a portal allows a **quick access** to some features (for example, a list of Gargantua databases or processes, search tools, a web page...).

A portal can be assigned **to the guest and/or identified users** of your choice, as well as to groups and roles. A user can have access to several portals and select one. The last portal selected by the user displays by default next time he logs in.

As an administrator, you can configure **the layout and content** of a portal.

By default, when there is no portal created yet or if a user has no portal assigned, a blank page with a logo displays.

MANAGING PORTALS

CREATING A PORTAL

To create a portal, proceed as follows:

1. In the left pane of Gargantua Administration Tool, click the **Portals** branch.
The portals list displays in the right pane.
2. In the bottom left corner of the right pane, click the **New** button.
The new portal management screen displays.
3. Enter the name and, if you want, the new portal description.
4. Select a [type of layout](#) for the portal.
5. For each portal frame, select a [type of content](#).
6. Determine if the portal will be [public](#), and if it will be the [default portal](#).
7. [Assign users](#) to the portal.
8. Click the **Preview** tab to see how the portal will display in Gargantua Web Client.
9. Click the **Apply** button.

The new portal is now available for the Web Client users it has been assigned to.

MODIFYING A PORTAL

To modify a portal, proceed as follows:

1. In the left pane of Gargantua Administration Tool, click the **Portals** branch.
The portals list displays in the right pane.
2. Click the name of the portal you want to modify.
The portal management screen displays.
3. Modify the [options](#) of your choice.
4. Click the **Preview** tab to see how the portal will display in Gargantua Web Client after the modifications.
5. Click the **Apply** button.

The modifications are now available for the Web Client users the portal has been assigned to.

DELETING A PORTAL

To delete a portal, proceed as follows:

1. In the left pane of GARGANTUA Administration Tool, click the **Portals** branch.

The portals list displays in the right pane.

2. Click the name of the portal you want to delete.

The portal management screen displays.

3. In the bottom left corner of the screen, click the **Delete** button.

A confirmation message displays.

4. Click the **Yes** button.

The portal is no longer available for the Gargantua Web Client users.

DUPLICATING A PORTAL

The duplication feature allows you to:

- Create similar portals: work on a first portal, then duplicate it and make the necessary changes to the copy;
- Test modifications on a portal copy in order to avoid damaging the original one.

To duplicate a portal, proceed as follows:

1. In the left pane of GARGANTUA Administration Tool, click the **Portals** branch.

The portals list displays in the right pane.

2. Click the name of the portal you want to duplicate.

The portal management screen displays.

3. In the bottom left corner of the screen, click the **Duplicate** button.

A new portal named “xxx (1)” displays in the navigation tree of the Gargantua Administration Tool left pane. The management screen displayed in the right pane is now the copy’s.

EXPORTING A PORTAL

GARGANTUA allows you to export a portal as an archive in the .sxa format, in order to import it again to another server.



You can only export one portal at a time.

Proceed as follows:

1. In the left pane of Gargantua Administration Tool, click the **Portals** branch.

The portals list displays in the right pane.

2. Click the name of the portal you want to export.

The portal management screen displays.

3. In the bottom right corner of the right pane, click the **Export** button.

A dialog displays.

4. Browse to the local or network location where you want to save the archive, and click the **Save** button.

A confirmation message displays.

5. Click the **OK** button.

The export in the .sxa format has been created and saved in the chosen location.

IMPORTING A PORTAL

To import a portal in a .sxa format, proceed as follows:

1. In the left pane of Gargantua Administration Tool, click the **Portals** branch.

The portals list displays in the right pane.

2. In the bottom right corner of the right pane, click the **Import** button.

The file explorer displays.

3. Browse to the folder where you saved the .sxa archive, select it, and click the **Open** button.

A dialog allowing to select the objects to import displays.

4. In the **Object** column, check the checkbox corresponding to the portal you want to import.

5. Click the **OK** button.

A confirmation message displays.

6. Click the **OK** button.

The imported portal displays in the navigation tree of the Gargantua Administration Tool left pane. It is renamed “xxx **(1)**” if a portal with the same name already exists.

CONFIGURATION OPTIONS OF A PORTAL

The portal management screen is as follows:

The screenshot shows the 'Manage portals' interface. It includes a navigation bar with 'Portals', 'Preview', 'Log', and 'Help'. The main content area is titled 'Portal data' and contains several sections:

- Identification:** Includes a 'Portal name' field (set to 'Legal Department') and a 'Portal description' text area (containing 'This portal provides the members of the Legal Department with a quick access to the features they need most.').
- Portal layout:** A dropdown menu currently set to 'Layout 5d'.
- Options:** Two checkboxes, 'Public portal' and 'Default portal', both of which are unchecked.
- Layout and content:** A section with five placeholder boxes for 'Login dialog', 'Inbox summary', 'Full text search', 'Database list (vertical)', and a large box for 'Resource to select or webpage' (containing the URL 'http://laws.justice.gc.ca/eng/').
- Portal assignments:** A section titled 'Users, groups, roles' with a list of users: 'Lawyer', 'Legal Assistant', 'John Ford', and 'James Cook'. There are icons for adding and removing users.

At the bottom of the screen, there are buttons for 'New', 'Delete', 'Apply', 'Duplicate', and 'Export'.

From this screen, you can set for each portal different options explained in detail below.

TYPES OF LAYOUT

Selecting a type of layout allows you to determine how to divide the portal.

You can choose either a [predefined layout](#) containing a fixed number of areas for a given size, or a [customized layout](#) allowing you to create as many areas as you want and to choose their sizes.

PREDEFINED LAYOUT

To use a predefined layout, proceed as follows:

1. In the left pane of GARGANTUA Administration Tool, click the **Portals** branch.

The portals list displays in the right pane.

2. Click the name of the portal you want to configure.

The portal management screen displays in the right pane.

3. In the **Portal layout** drop-down list, select a predefined layout (for example, **Layout 3a**).



A predefined layout can contain from 1 to 8 areas. The number of areas is shown in the layout's name. For example, the layout "3a" contains three areas.

The selected layout displays in the **Layout and content** frame. You can now set a [type of content](#) to each area.

CUSTOMIZED LAYOUT

To use a customized layout, proceed as follows:

1. In the left pane of GARGANTUA Administration Tool, click the **Portals** branch.

The portals list displays in the right pane.

2. Click the name of the portal you want to configure.

The portal management screen displays in the right pane.

3. In the **Portal layout** drop-down list, select **Customized**.

The customizable layout displays in the **Layout and content** frame. It only contains one area.

4. In the **Layout and content** frame, double-click the only area of the portal.

The **Portal customization** dialog displays.

5. Select the **Divide into several areas** radio button.
6. Choose between **Horizontal division** and **Vertical division**.
7. In the **Number of areas** drop-down list, select the number of areas to create.
8. In each field corresponding to an area, determine the space occupied by the area.
9. Click the **OK** button.

The initial area is divided into several areas as specified.

10. Double-click one of the newly-created areas.

The **Portal customization** dialog displays. At every step, you can choose either to divide the area into several ones (by repeating steps 5 to 9) or to set a [Type of content](#) to the area.

TYPES OF CONTENTS

SELECTING A TYPE OF CONTENT

To select a type of content, proceed as follows:

1. In the left pane of GARGANTUA Administration Tool, click the **Portals** branch.

The portals list displays in the right pane.

2. Click the name of the portal you want to configure.

The portal management screen displays in the right pane.

3. In the **Layout and content** frame, double-click one of the portal areas.

The **Portal customization** dialog displays.

4. If you have selected a predefined layout, in the **Content type** drop-down list, [select a value](#).

If you have selected a customized layout, select the **Add a content** radio button, then in the **Content type** drop-down list, [select a value](#).

5. Click the **OK** button.

The dialog closes. The selected type of content displays in the portal area.

TYPES OF CONTENTS AVAILABLE

A portal area can contain the following items:



Database list (vertical)

The area contains the list of GARGANTUA databases the user can access, displayed vertically.



Database list (horizontal)

The area contains the list of GARGANTUA databases the user can access, displayed horizontally.



Process list (vertical)

The area contains the list of processes the user can access, displayed vertically.



Process list (horizontal)

The area contains the list of processes the user can access, displayed horizontally.



General search

The area contains the tool allowing to perform a general search in Gargantua databases.



Full-text search

The area contains the tool allowing to perform a full-text search in Gargantua databases.

 Inbox summary

The area indicates the number of tasks received, waiting, overdue or expiring this day, and the number of drafts in the user's inbox.

 Resource to select or webpage

The area can contain:

- a text, an image or a HTML resource previously imported using the **Resources** branch (left pane of Gargantua Administration Tool); in the **Content data** field, select one the resources available;
- a webpage; in the **Content data** field, type the complete URL (http://...) of the webpage.

 Logo

The area contains the logo set in the **siatel.config.ui.clientlogo.normal** and **siatel.config.ui.clientlogo.dimmed** keys of the **Server configuration** screen (Web Client G menu).

 Search Template list

The area contains the tool allowing the user to use Search Templates.

 Search Template to select

The area contains a specific Search Template. In the **Content data** drop-down list, select an existing Search Template.

 Login dialog

The area contains a dialog allowing the user to enter his/her login credentials.

 Gargantua introduction text

The area contains a help page about the use of Gargantua Web Client.

 Last posts in the forums

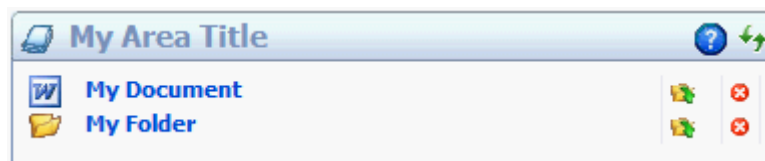
The area contains the last posts added to the forums.

In the **Content data** field, type the number of posts to include in the area.

 Documents list

The area can contain direct links to folders or documents that will be selected later on by a portal manager from Gargantua Web Client using the **Display on portal** tool.

In the **Area title** field, type a title for the portal area. The portal area title will display in Gargantua Web Client:



The portal area title is useful if the portal contains several “List of folders or documents” areas: it allows the portal manager in charge of selecting the folders or documents to determine which portal area to use.



Tree of Gargantua database

The area contains the tree of a Gargantua database.

In the **Gargantua database** drop-down list, select a Gargantua database.



Notifications

The area contains all the notifications assigned to the user.



The “Show in portal” option must also be enabled in the “General options” of the “Interface settings profile” branch.



List of favorite documents

The area contains all the favorite documents of all the user’s databases.



Validation cycle documents

The area contains the documents that are part of a validation cycle in which the user has a role.



Summary of validation cycle documents

The area contains a summary of the documents that are part of a validation cycle in which the user has a role.



Latest documents list

The area contains the list of the latest documents that were opened in the Web Client, and allows the user to open them directly.

PUBLIC PORTAL/DEFAULT PUBLIC PORTAL

If you want guest users to get a specific interface when accessing Gargantua Web Client, you can set one or more portals as public by checking the **Public portal** checkbox.

If several portals have been set as public, you need to set a default portal by checking the **Default public portal**

checkbox. The default portal displays when a guest user accesses Gargantua Web Client. The other portals, if any, are available in the drop-down list in the top right corner of the **Portal** tab.



The “Default public portal” checkbox is grayed if you have not checked the “Public portal” checkbox.

Only one portal can be the default portal. If you check the “Default public portal” checkbox for a portal, the checkbox is automatically unchecked for any portal previously set as the default one.

PORTAL ASSIGNMENTS

Each portal needs to be assigned to users, groups and/or roles that will be allowed to use it when logging in to Gargantua Web Client.



A user can have access to several portals. Those which are not displayed by default are available in a drop-down list in the top right corner of the “Portals” tab.

For each user, GARGANTUA remembers the last portal selected, and displays it by default.

To assign a portal to a user, group or role, proceed as follows:

1. In the left pane of Gargantua Administration Tool, click the **Portals** branch.

The portals list displays in the right pane.

2. Click the name of the portal you want to assign to a user, group or role.

The portal management screen displays in the right pane.

3. In the **Portal assignments** section, click the  button.

A dialog box displays.

4. In the **Name** field of the dialog, type the first letters of the name of the user, group or role you want to assign the portal to.

A list displays.

5. Double-click the name of the user, group or role of your choice.

The corresponding users can now access the portal. You can remove an assignment at any time by selecting it, and clicking the  button.