Informatica® MDM - Supplier 360
10.5 HotFix 3

Portal Configuration Tool Guide

Informatica MDM - Supplier 360 Portal Configuration Tool Guide
10.5 HotFix 3
July 2024

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Preface

Use the *Informatica*® *MDM - Supplier 360 Portal Configuration Tool Guide* to learn how to create, manage, and localize a portal using the Portal Configuration tool. Learn how to add pages and configure fields in a portal.

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CHAPTER 1

Introduction to Portal Configuration Tool

This chapter includes the following topics:

Portal Configuration Tool Overview

Use the Portal Configuration tool to import and customize a preconfigured portal. You can also create a custom portal based on your requirement. You can use a portal to create business entity records.

A portal contains multiple pages. When you customize a portal, you can edit any page of the portal. Each page contains one or more sections. Each section contains one or more components. Each component displays one or more fields. You can edit the sections, components, and fields of a page. You can create or remove pages from the portal.

When you create a custom portal, you can create all the pages from scratch and configure the sections, components, and fields for each page.

Logging In to the Portal Configuration Tool

To log in, you need the URL for the Portal Configuration tool and your user credentials. The URL contains the MDM Hub server host name and port number. If you do not have this information, contact your MDM administrator.

1. Open a supported browser.
2. Enter the URL for the Portal Configuration tool.

    The URL has the following format:

    - **Secure connections.** `https://<MDM Hub Server host name>:<MDM Server port number>/portal-config/`
    - **Non-secure connections.** `http://<MDM Hub Server host name>:<MDM Server port number>/portal-config/`

The **Log In** page opens.

3. Enter your user name and password.

4. Click **Log In**.

The Portal Configuration tool opens and displays the **Home** page.

CHAPTER 2

Getting Started with the Portal

This chapter includes the following topics:

Getting Started with a Portal Overview

After you log in to the Portal Configuration tool, you can import a preconfigured portal. A preconfigured portal contains multiple pages that are preconfigured for you to get started immediately.

After you import a portal, you can start the portal and access it in a browser.

Importing the Preconfigured Portal

After you log in to the Portal Configuration tool, import the preconfigured portal.

1. Log in to the Portal Configuration tool.

   For more information about logging in to the Portal Configuration tool, see "Logging In to the Portal Configuration Tool" on page 8.

2. Click **Import Portal**.

   The **Import Portal** dialog box appears.

3. If you want to use the Product 360 components in the Supplier Portal, perform the following tasks:

   a. Navigate to the following directory:

      `<MDM Installation Directory>/app/tsr/SupplierPortalWithProduct360`

   b. Select the `SupplierPortalConfig.zip` file.

4. If you do not want to use the Product 360 components in the Supplier Portal, perform the following tasks:

    a. Navigate to the following directory:

        `<MDM Installation Directory>/app/tsr/SupplierPortal`

    b. Select the `SupplierPortalConfig.zip` file.

5. Select the Operational Reference Store for the portal to use.

6. Select the source system for the portal to use.

7. Enter a unique name for the portal.

8. Click **Import**.

    The selected portal is imported.

Editing a Portal

If you plan to edit a portal that is already deployed, ensure that you stop the portal before you edit it.

Note: For more information about stopping the portal, see .

1. In the Portal Configuration tool, click the **Action** icon on the portal that you want to edit.

2. Select **Edit**.

    The portal configuration is available in the edit mode.

3. To edit the portal settings, perform the following tasks:

    a. Click **Portal Settings**.

        The portal configuration is available in the edit mode.

    b. Edit the required settings, and click **Save**.

4. To edit a page, perform the following tasks:

    a. Click the page that you want to edit.

        The page is available in the edit mode.

    b. Edit the page configuration, and click **Save**.

Starting a Portal

After you start the portal, the portal is deployed, and you can access the portal with the portal URL.

1. In the Portal Configuration tool, click the **Action** icon on the portal that you want to start.

2. Select **Start Portal**.

    If the portal is deployed successfully, you get a green icon on the portal.

3. To get the portal URL, click the **Action** icon on the portal, and select **Copy URL**.

    The portal URL is copied to the clipboard. You can paste the URL in your browser.

CHAPTER 3

Creating a Portal

This chapter includes the following topics:

Creating a Portal Overview

If you do not want to use the preconfigured portals, you can create a custom portal based on your requirement. A portal can contain multiple pages, such as log in page, sign up page, and registration page. When you create a portal, you can create all these pages and configure the business entity fields from which you want retrieve and store data. You can assign states to the pages and control access to the pages.

You can also configure the following elements for the portal:

- Header and footer.
- Business entity fields to store the user inputs.
- Email templates to use for different scenarios.

Portal State Management

When you create a portal, you can enable the portal state management. Use the portal state management to refer to the status of records and control access to the portal pages.

You can assign one ore more states to each page. Based on the status of the records, the users get access to the corresponding pages.

For example, define portal states, such as registered, submitted, approved, rejected, and sent back. When a user signs up, the record is associated to the registered state. The user will be able to see pages that are associated to the registered state. If you associate the registration page to the registered state, the user can access the registration page to submit additional details. After the user submits additional details, the record is associated to the submitted state. The user will be able to see pages that are associated to the submitted state. After the record is approved, the user will be able to see pages that are associated to the approved state.

Note: After you create a portal, you cannot enable or disable the portal state management.

Creating a Portal

Before you create a portal, ensure that you have a good understanding of the data model of your environment.

1. Log in to the Portal Configuration tool.

   For more information about logging in to the Portal Configuration tool, see "Logging In to the Portal Configuration Tool" on page 8.

2. Click **Create Portal**.

   The **General** page appears.

Configuring the General Settings for the Portal

You must configure a title for the portal and the business entity for which you want to create records. You can also configure a header and a footer for the portal.

1. On the **General** page, configure the following portal details:

Field	Description
Portal Name	Unique identifier for the portal.
Portal Title	Display name of the portal that appears on the header of the portal.
Database	Operational Reference Store for the portal to use.
Business Entity	Business entity to which you want to add records through the portal.
Source System	Name of the source system to assign to the records created through the portal.
Enable Portal State	Indicates whether to use portal states to refer to the status of the records. You can also use the portal states to control access to the portal pages.
External Authentication	Indicates whether to use an external authentication system for the portal.

2. If you enable portal states, configure the following state settings:

Field	Description
Reference Entity Containing States	Name of the reference entity that stores the state values.
Field Containing States	Name of the field that contains the state values. To see the list of state values that the field contains, click **View List of States**.
Field Containing Filters	Name of the field based on which you want to filter the state values so that you can use only a subset of state values in the portal.
Filter Value	Value based on which you want to filter the states.

3. Configure the following role settings:

Field	Description
Reference Entity Containing Roles	Name of the reference entity that stores the portal user roles.
Field Containing Roles	Name of the field that contains the portal user roles. To see the list of user roles that the field contains, click **View List of Roles**.

4. To configure header, configure the following header settings:

Field	Description
Logo	URL of an image that you want to use as logo of the portal.
Background Color	Background color of the header of the portal. Default is white.
Font Color	Font for the portal title. Default is black.

5. To configure footer, configure the following footer settings:

Field	Description

Footer Text	Text to use in the footer. To hyperlink a text, use the following format:
	`[text](URL)`
	The following sample text hyperlinks the text *Google*:
	`[Google](https://www.google.com/)`

Preview Footer Text	Displays a preview of the footer text. **Note:** The preview appears only after you type the text in the Footer Text field.
Background Color	Background color of the footer of the portal. Default is white.
Font Color	Font for the footer text. Default is black.

6. Click **Next**.

   The **Log In** page appears.

Configuring the Log In Page Settings for the Portal

You can configure the business entity fields that store the user details. You can configure title and background image for the log in page. You can also configure the email templates to use when a user resets the password.

1. On the **Log In** page, configure the following page details:

Field	Description
Background Image	URL of an image that you want to use as the background image for the log in page.
Title	Title to display in the log in page.

2. Specify the business entity fields that store the following user details:

Field	Description
Email Address	Name of the business entity field that stores the email addresses. For example, Contacts.contacts.ContactElectronicAddress.etrncAddr.
User Name	Name of the business entity field that stores the user names. For example, Contacts.contacts.prtlUsrNm.
User Role	Name of the business entity field stores the user roles. For example, Contacts.contacts.prtlUsrRle.roleCode.
Portal State Details	Name of the business entity field that stores the portal state values. For example, Status.prtyStsVal.partyStatusValue.

3. To configure the email templates to use when users reset their password, configure the following details:

Field	Description
Reset Password	Name of the email template to use when users request to reset their passwords. For example, resetPassword. You can find the email templates in the following directory: `<MDM Installation Directory>/app/portal/email-config/templates_others/avos-templates`
Successful Reset of Password	Name of the email template to use after a password is reset successfully.

Note: When you set the portal to use external authentication, you cannot configure the email templates through the Portal Configuration tool. Configure the email templates through the external authentication system.

4. To configure external authentication for the portal, configure the following details:

Field	Description
Enable Single Sign-On (SSO)	Indicates whether the external authentication is enabled for the portal.
Forgot Password URL	The URL of the site that contains information on how to reset the password.

5. Click **Next**.

The **User Creation** page appears.

Configuring the User Creation Page Settings for the Portal

After you configure the log in page, you can configure the business entity fields to store the user details. You can also enable whether you want the users to create additional users.

1. On the **User Creation** page, on the **Field Mapping** tab, configure the following settings:

Field	Description
Business Entity View	Business entity view that you want to use for the registration process.
Default Section Heading	Title for the section that lists the business entity fields in the registration page.

2. Configure the following user details:

Field	Description
Create additional users	Indicates whether you want users to create additional users in the portal. **Note:** If you set the portal to use external authentication, this field remains disabled. The user management must be a part of the external authentication system.
Field with One to Many Relationship	Name of the field with one-to-many relationship. When you select a field, this section displays only the child fields of the selected field.
User Role	Name of the business entity field to store the user roles.
Email Address	Name of the business entity field to store the email addresses.
Use email address as user name	Indicates whether you want to use email address as user name.
User Name	Required if you do not want to use email address as user name. Name of the business entity field to store the user names.
First Name	Name of the business entity field to store the first names.
Last Name	Name of the business entity field to store the last names.
Country Dialing Code	Name of the business entity field to store the country dialing codes.

Field	Description
Phone Number	Name of the business entity field to store the phone numbers.
Title	Name of the business entity field to store the job titles.

3. If you enable portal states, configure the following details:

Field	Description
Portal State	Name of the business entity field that contains the portal state values.

4. If you enable users to create additional users, on the **Additional Users** tab, configure the following settings:

   Note: If you set the portal to use external authentication, the **Additional Users** tab remains disabled.

Field	Description
Allowed Roles to Create Additional Users	List of roles with permission to create additional users in the portal.
Allowed States to Create Additional Users	List of portal states with permission to create additional users in the portal.
Hide User Role Field	Indicates whether you want to hide the User Role field in the portal. For example, when the user role does not have permission to create additional users, enable this option so that the users do not have to specify their role in the portal.

Invite User	Name of the email template to use when additional users are invited to the portal. For example, setPassword.
	You can find the email templates in the following directory:
	`<MDM Installation Directory>/app/portal/email-config/`
	`templates_others/avos-templates`

Successful Reset of Password	Name of the email template to use after a password is reset successfully.

5. Click **Next**.

   The **Registration** page appears.

Configuring the Registration Page Settings for the Portal

After you configure the user creation details, you can configure the business entity fields that you want to use for the registration process. When you set the portal to use external authentication, you cannot register portal users. The user registration process must be a part of the external authentication system.

1. On the **Registration** page, on the **Page Details** tab, configure the following settings:

Field	Description
Disable Registration	Indicates whether you want the portal user to register online. To allow users to register online, clear the check box. **Note:** If you set the portal to use external authentication, this field remains disabled.
Background Image	URL of an image that you want to use as the background image for the registration page.
Title	Title for the registration page. For example, Sign Up Form.
Welcome Text	Text to display in the registration page to welcome the user. For example, Fill in the fields to create an account.
Default User Role	Default user role to assign after a user registers.
Default Portal State	Default portal state to assign after a user registers.
Maximum Number of Fields to Display in a Row	Maximum number of fields that you want to display in each row of the page.

Terms and Conditions Text	Descriptive text that explains the terms and conditions to the portal user. To hyperlink the text, use the following format:
	`[text](URL)`
	The following sample text hyperlinks the text *Terms and Conditions*:
	`[Terms and Conditions](https://www.amazon.com/gp/help/customer/`
	`display.html?nodeId=508088)`

Preview Terms and Conditions Text	Displays a preview of the terms and conditions text. **Note:** The preview appears only after you type the text in the Terms and Conditions Text field.

Successful Registration	Name of the email template to use after a user is successfully registered.
	You can find the email templates in the following directory:
	`<MDM Installation Directory>/app/portal/email-config/`
	`templates_others/avos-templates`

2. On the **Layout** tab, perform the following tasks:

   a. Enter a name for the default section.

   b. From the list of available fields, select a field that you want to add to the section, and then click **Add**.

   c. To add more fields, repeat step 2.

      To add all the fields, click **Add All**. To change the order of selected fields, click **Move Up**, **Move Down**, **Move to Top**, or **Move to Bottom**.

d.   From the list of selected fields, select each field to configure the field properties.

e.   To add more sections to the page layout, click **Add a section** and repeat step 1 through 4.

Note: To change the order in which sections appear, click **Move section up** or **Move section down**.

f.   Click **Save**.

CHAPTER 4

Adding Pages to Portal

This chapter includes the following topics:

Adding Pages to Portal Overview

After you create a portal, you can create pages for the portal. You can create predefined pages or custom pages.

Each page can contain one or more sections. Each section can contain one more components. Each component can contain one ore more fields. Based on the types of a field, you can configure how you want to view the field in the page.

Type of Pages

You can create the following types of pages for your portal:

Record Page

A predefined page with a form layout. You can have one or more sections and select the fields that you want to view in each section. Use a record page to create a form containing business entity fields based on a business entity view.

Custom Page

A page with a custom layout. You can add one or more sections to a page. For each section, you can add one or more predefined components. For example, add a wizard component to streamline a series of

forms that a portal user can fill in. You can then select the fields that you want to view in each component.

Type of Views

Based on the types of fields, you can configure how you want to view the field in a portal page.

When you configure a business entity field, you can set the view of the field as a radio button, drop-down list, checkbox, text area, or a text box based on the input data type of the field. When you use a one-to-many field, you can configure to view the fields as a card, grid, checkbox list, or dynamic card.

Views for Business Entity Fields

When you add a business entity field to a portal page, you can use one of the following views for the field based on the type of the field:

Text Field

For short text input. Use it for fields that store names, identifiers, postal code, website URL, and so on.

Text Area

For long text input. Use it for fields that store description and address.

Radio Button or Checkbox

For displaying boolean values. Use it when you want to display boolean values for the field but store only one option. For example, a checkbox to enable auto notifications.

Drop-down list

For displaying multiple options. Use it when you want to display and store multiple options for the field. For example, address type is a field where you can select multiple types for a single address.

Views for One-to-Many Fields

When you add a one-to-many field to a portal page, you can configure one of the following views for the field:

Card

Displays the selected field and its child fields in a form layout.

The following image shows a sample page that uses the card view:
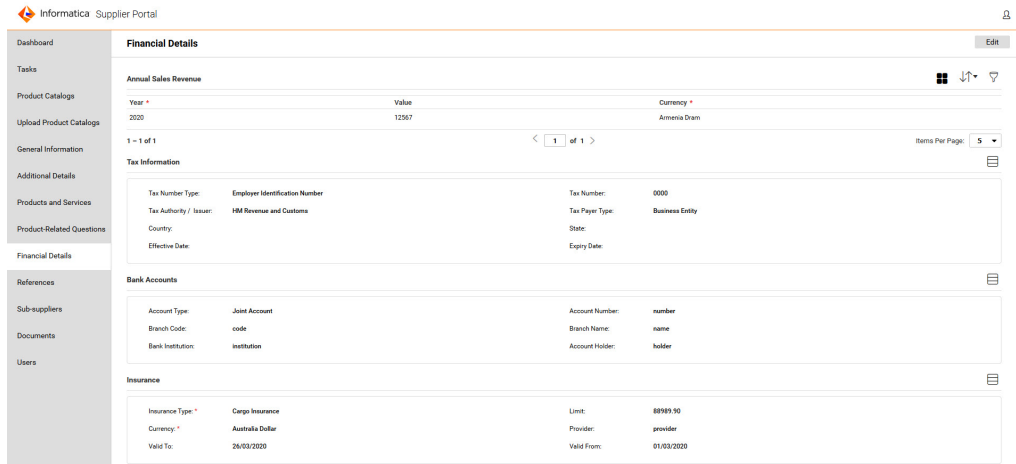
For each selected field, you can choose how many child fields to display per page using the Items Per Page menu.

Grid

Displays the selected field and its child fields in a tabular layout. If the selected one-to-many field contains one or more child one-to-many fields, the grid view cannot display the fields of the child one-to-many fields.

The following image shows a sample page that uses the grid view:
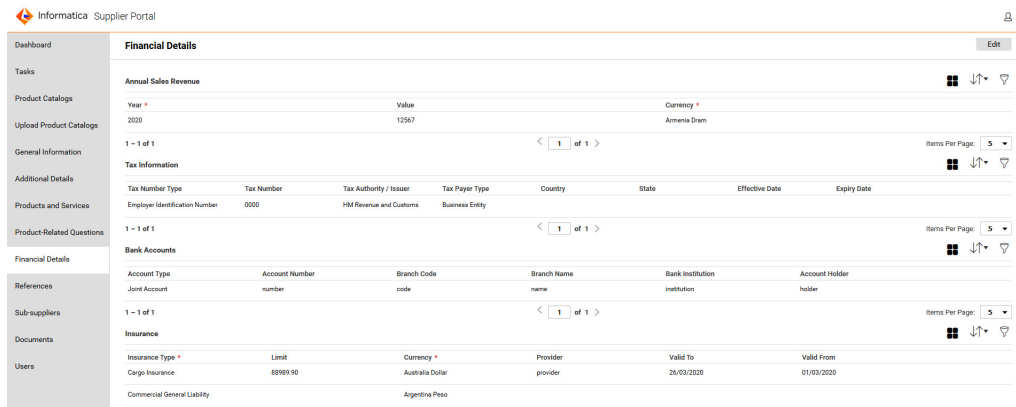
For each selected field, you can choose how many child fields to display per page using the Items Per Page menu.

Checkbox list

Displays the selected field and its child fields as a list of check boxes. A portal user can select multiple values in a checkbox list.

Note: When you select a checkbox list view for a one-to-many field, ensure that you don't select any child field as a required field. If you choose a child field as a required field, the checkbox list view doesn't display the child field within a one-to-many field.

The following image shows a sample page that uses checkbox list view:
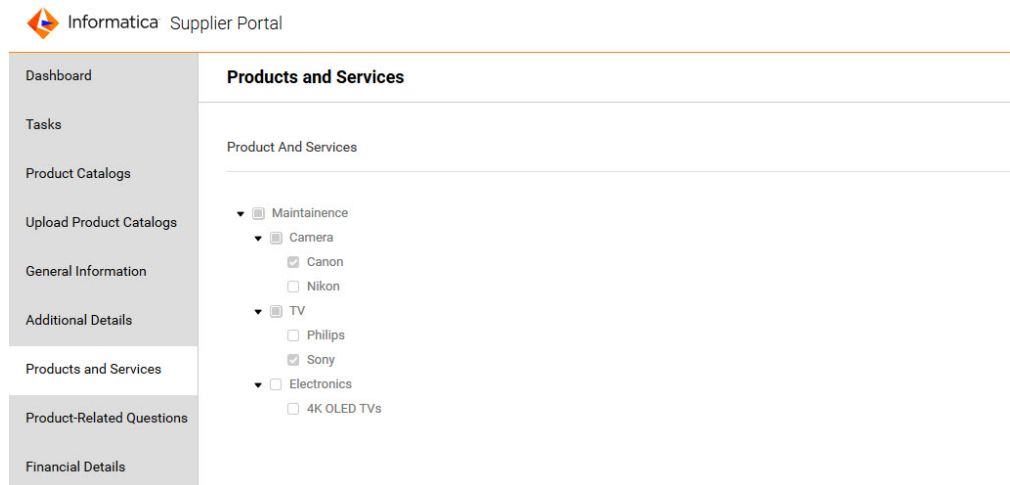
Dynamic card

Displays fields based on a lookup field that you select. You can also dynamically update the labels for the fields and then specify the fields to store the input values. Use the dynamic card to list a questionnaire or list different types of identifiers based on a lookup field.

The following image shows a sample page that uses the dynamic card view:

Creating a Record Page

A record page contains a default section with a predefined form layout. You can add one or more sections and select the fields that you want to view in each section.

1. On the portal home page, click **Create Page**.

   The **Configure General Properties** page appears.

2. Configure the following details:

Field Name	Description
Page Name	Display name of the page. For example, General Information.
States	List of portal states with permission to access the page.
Roles	List of portal user roles with permission to access the page.
Page Type	Type of page to create. Select **Record Page**.
Business Entity View	Business entity view that you want to use for the page.
Read only	Indicates whether the page must be available for the portal user in the read-only mode.
Maximum Number of Fields to Display in a Row	Maximum number of fields that you want to display in each row of the page.

3. Click **Next**.

   The **Design Layouts** page appears.

4. Enter a name for the default section.

   a. To hide the section name, select **Hide header**.

   b. To enable validation for all root fields in the section, select **Enable Validation**.

   c. To view the tooltip of the section at the portal, enter a value for the **Tooltip**. Default is blank.

5. From the list of available fields, select a field that you want to add to the section, and then click **Add**.

6. To add more fields, repeat step 5.

   To add all the fields, click **Add All**. To change the order of selected fields, click **Move Up**, **Move Down**, **Move to Top**, or **Move to Bottom**.

7. From the list of selected fields, select each field to configure the field properties.

   To know more information about how to configure field properties, see the topic.

8. To add more sections to the page layout, click **Add a section** and repeat step 4 through 7.

   Note: To change the order in which sections appear, click **Move section up** or **Move section down**.

9. Click **Save**.

Creating a Custom Page

A custom page contains a customizable layout. You can add one or more sections to a page. For each section, you can add one or more predefined components, such as wizard and external links.

1. On the portal home page, click **Create Page**.

   The **Configure General Properties** page appears.

2. Configure the following settings:

Field Name	Description
Page Name	Display name of the page.
States	List of portal states with permission to access the page.
Roles	List of portal user roles with permission to access the page.
Page Type	Type of page to create. Select **Custom Page**.

3. Click **Next**.

   The **Design Layouts** page appears.

4. Hover the cursor over the section, and then click **Add a Component**.

   The **Add a Component** panel appears.

5. Hover the cursor over the section, and then click **Add a Component**.

   The **Add a Component** panel appears.

6. Hover the cursor over the component that you want to add, and then click **Add**.

7. To configure the component settings, click **Settings**, and then set the required properties of the component.

   To know more about configuring components to a custom page, see the "Configuring Components for a Custom Page" on page 25 topic.

8. To add more components, repeat steps 4 through 7.

9. To add more sections on the layout, click **Add a Section Below**.

   A new section appears below the existing section.

10. To add a component to the section, repeat steps 4 through 8.

11. To move the components within the section and from one section to the other, drag the components between sections.

12. Click **Save**.

Configuring Components for a Custom Page

You can add and configure the following components for a custom page:

- Wizard
- External Link
- Product 360 Timeline
- Product 360 Task View
- Product 360 Catalog
- Product 360 Catalog Upload
- Twitter Feed
- Text

Configuring a Wizard Component

Use the wizard component to create a series of steps containing fields. You can associate a business process with the wizard that dictates the possible actions that a portal user can perform on the wizard. For example, you can associate a business process that requires the portal user to fill in the fields, provide comments, and then submit the filled in information for a review process.

1. Add a wizard component to a section of a custom page.

   The wizard component is added to the page.

2. Click **Settings**.

3. On the **General** tab, configure the following settings for the page:

Field Name	Description
Title	Display title of the wizard. For example, Registration Form.
Dimension Style	Height of the wizard panel. Use one of the following options: - Fit to Content. Adjusts the height automatically based on the content. - Custom. Sets the height based on the value you specify.
Height	Size of the wizard in pixel.

4. On the **Component** tab, configure the following settings:

Field Name	Description
Associated Task	Name of the task that you want to associate with the wizard. The portal user can perform the actions associated with the task. For example, AVOSBeDraftState.
Default Action	Default action to display on the wizard. For example, Submit.
Logout Actions	Comma-separated list of actions to log out a portal user after the user performs one of the specified actions.
Business Entity View	Business entity view for the wizard.
Overview step	Indicates whether you want to have an overview page for the wizard. Select this option to include an overview page.
Show Comments	Indicates whether you want to include the comment option in the wizard. You can configure the task associated with the wizard to make the comments mandatory.

5. To add a step, click **Add a step**.

   A step is added.

6. Enter a title for the step.

7. Enter a name for the section.

   Note: If you want to hide the section name, select **Hide header**.

8. From the list of available fields, select a field that you want to add to the section, and then click **Add**.

   Note: Repeat the step to add more fields. If you want to add all the fields, click **Add All**.

To know more information about how to configure field properties, see the "Configuring Field Properties" on page 32 topic.

9. To add more steps, repeat steps 5 through step 8.

10. After you add all the required steps, click **Save**.

The wizard is created.
The following image shows a sample of a wizard in a portal:
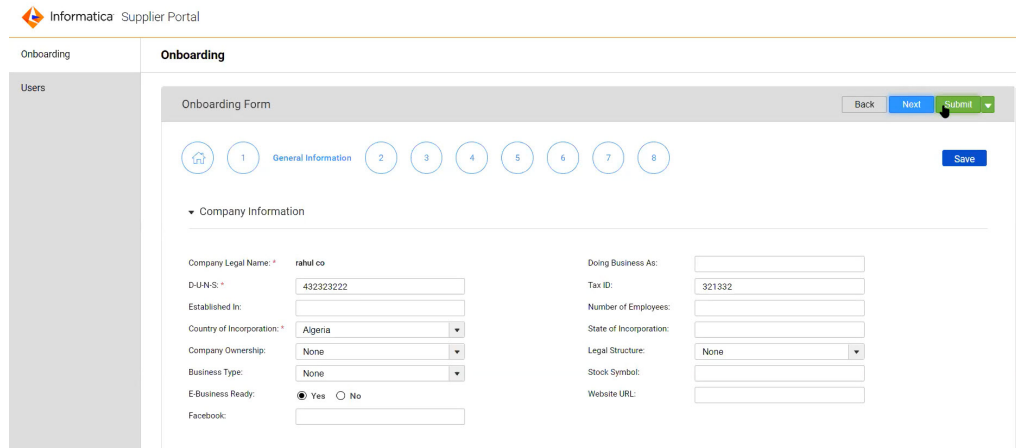
Configuring an External Link Component

Use an external link component to display the content of an HTML page requested from an external URL. When you configure an external link, you can use certain parameters to append to the URL.

1. Add an external link component to a section of a custom page.

The external link component is added.

2. Click **Settings**.

3. On the **General** tab, configure the following settings for the page:

Field Name	Description
Title	Display title of the external link component.
Dimension Style	Height of the external link panel. Use one of the following options: - Fit to Content. Adjusts the height automatically based on the content. - Custom. Sets the height based on the value you specify.
Height	Size of the component in pixel.

4. On the **Component** tab, configure the following details for the page:

Field Name	Description
URL	URL of the external page that you want to display on the portal. The URL can be static or dynamic with placeholder attributes.
	The following URLs are examples for static and dynamic URLs:
	- Static URL. `https://finance.yahoo.com/`
	- Dynamic URL with placeholder attributes. `http://ec2-18-203-163-134.com:9090/FileUploader/index_supplier.html?id={extId}&hpmsupplierid=18601&userName={portalUsername}&isPortalUser=false&locale={localeKey}`
	A dynamic URL contains attributes that the portal resolves in run time. For a dynamic URL, you must add the attributes in key value pairs in the following format to a URL:
	`&<key 1>=<{value 1}>&<key 2>=<{value 2}>`
	Note: You must enclose the placeholder attributes specified in the dynamic URL within curly brackets. To dynamically resolve the current active user name and default language of the portal, use the following attributes in the URL:
	- `portalUsername`
	- `localeKey`
Is dynamic URL	Indicates whether the specified URL is static or dynamic. By default, the specified URL is a static URL.

5. Click **Save**.

Configuring a Product 360 Timeline Component

Use the Product 360 Timeline component to display the timeline component of the Product 360 Supplier Portal. The messages appearing on the timeline are sorted based on the time of receipt. You can filter or delete messages on the timeline.

1. Add a Product 360 Timeline component to a section of a custom page.

   The Product 360 timeline component is added to the page.

2. Click **Settings**.

3. On the **General** tab, configure the following settings:

Field Name	Description
Title	Display title of the Product 360 Timeline component.
Dimension Style	Height of the component panel.
	Use one of the following options:
	- Fit to Content. Adjusts the height automatically based on the content.
	- Custom. Sets the height based on the value you specify.
Height	Size of the component in pixel.

4. On the **Component** tab, configure the following details for the page:

Field Name	Description
Server URL	URL to access the MDM - Product 360 Supplier Portal.

5. Click **Save**.

Configuring a Product 360 Task View Component

Use the Product 360 Task view component to displays the Task view of the Product 360 Supplier Portal. The Tasks View component displays all the tasks created manually or by a workflow. When you add the Product 360 Task View component to a page, the portal users can view and manage the tasks related to Product 360.

1. Add a Product 360 Task View component to a section of a custom page.

   The Product 360 Task View component is added.
2. Click **Settings**.
3. On the **General** tab, configure the following settings:

Field Name	Description
Title	Display title of the Product 360 Task View component.
Dimension Style	Height of the component panel. Use one of the following options: - Fit to Content. Adjusts the height automatically based on the content. - Custom. Sets the height based on the value you specify.
Height	Size of the component in pixel.

4. On the **Component** tab, configure the following details for the page:

Field Name	Description
Server URL	URL to access the MDM - Product 360 Supplier Portal.

5. Click **Save**.

Configuring a Product 360 Catalog Component

Use the Product 360 Catalog component to display the catalog component of the Product 360 Supplier Portal. The Product 360 Catalog displays the product details.

1. Add a Product 360 Catalog component to a section of a custom page.

   The Product 360 Catalog component is added.
2. Click **Settings**.

3. On the **Configure General Properties** tab, configure the following settings:

Field Name	Description
Title	Display title of the Product 360 Catalog component.
Dimension Style	Height of the component panel. Use one of the following options: - Fit to Content. Adjusts the height automatically based on the content. - Custom. Sets the height based on the value you specify.
Height	Size of the component in pixel.

4. On the **Component** tab, configure the following details for the page:

Field Name	Description
Server URL	URL to access the MDM - Product 360 Supplier Portal.
User	Name of the user with administrative privileges to access the Product 360 Supplier Portal.

5. Click **Save**.

Configuring a Product 360 Catalog Upload Component

Use the Product 360 Catalog Upload component to display the catalog upload component of the Product 360 Supplier Portal. The portal users can use the catalog component to upload the product catalogs to Product 360.

1. Add a Product 360 Catalog Upload component to a section of a custom page.

    The Product 360 Catalog Upload component is added.

2. Click **Settings**.

3. On the **General** tab, configure the following settings:

Field Name	Description
Title	Display title of the Product 360 Catalog Upload component.
Dimension Style	Height of the component panel. Use one of the following options: - Fit to Content. Adjusts the height automatically based on the content. - Custom. Sets the height based on the value you specify.
Height	Size of the component in pixel.

4. On the **Component** tab, configure the following details for the page:

Field Name	Description
Server URL	URL to access the MDM - Product 360 Supplier Portal.
User	Name of the user with administrative privileges to access the Product 360 Supplier Portal.

5. Click **Save**.

Configuring a Twitter Feed Component

Use the Twitter feed component to display Twitter feeds from a Twitter account.

1. Add a Twitter feed component to a section of a custom page

   The Twitter feed component is added.

2. Click **Settings**.

3. On the **General** tab, configure the following settings:

Field Name	Description
Title	Display title of the Twitter feed component.
Dimension Style	Height of the component panel. Use one of the following options: - Fit to Content. Adjusts the height automatically based on the content. - Custom. Sets the height based on the value you specify.
Height	Size of the component in pixel.

4. On the **Component** tab, configure the following details for the page:

Field Name	Description
Twitter URL	URL of the Twitter account from which you want to retrieve the Twitter feeds.

5. Click **Save**.

Configuring a Text Component

Use a text component to display a static text on the portal.

1. Add a text component to a section of a custom page

   The text component is added.

2. Click **Settings**.

3. On the **General** tab, configure the following settings:

Field Name	Description
Title	Display title of the text component.
Dimension Style	The style or measurement you want for the component size. You can select **Fit to Content** or a **Custom** style. If you select the **Custom** style, enter the details of the size in the following field.
Height	Size of the component in pixel.

4. On the **Component** tab, configure the following details for the page:

Field Name	Description
Heading	Heading for the descriptive text that you want to display.

Body Text	Descriptive text to display. To hyperlink a text, use the following format:
	`[text](URL)`
	The following sample text hyperlinks the text *Google*:
	`[Google](https://www.google.com/)`

Preview Body Text	Displays a preview of the body text. **Note:** The preview appears only after you type the text in the Body Text field.

5. Click **Save**.

Configuring Field Properties

When you add fields to the pages of a portal, you can configure the properties of the field with a view of your choice.

All the fields of the record page display a configurable tooltip. By default, the name of the field appears as its tooltip. You can localize metadata to configure custom tooltips.

Complete the following steps to localize metadata and to configure custom tooltips:

1. Export and save the Metadata Localization bundle.

2. From the downloaded metadata properties file for the required locale, edit the tooltip for the field.

3. You can then import the updated language metadata bundle and publish the changes to the portal configuration.

For more information about Metadata Localization, see the *Informatica® MDM Installation and Configuration Guide*.

The types of views available for a field depend on the data type of the field you want to configure. For example, if you want to configure a lookup field with multiple options, you can select the drop-down list or radio button view. If you want to limit the portal user from selecting more than one option, then select the radio button view.

Configuring Properties of a Field with Text View

Use text field for a shorter text, such as name, email address, and phone number. Use text area for a descriptive text, such as description and address. The descriptive text wraps in the text area.

1. In a section, select the field that you want to configure.

   The **Properties** panel for the field appears.

2. Select one of the following options: .

   • **Text field**. For a shorter text.

   • **Text area**. For a descriptive text.

3. To set the field as a required field, select **Required**.

4. To hide the field on the page, select **Hidden field**.

5. To set the field as a read-only field, select **Read-only**.

6. To specify the format to prefix with a decimal field, enable **Select Format**.

   To select the desired format type to prefix with the decimal field, select an option from the available format type list.

   You can view the prefix for the selected value in the Supplier Portal. For example, if you have specified the format type as Currency with the prefix as USD and value as 100, you might see the value as USD 100.

7. To select the desired date format for a date field, select an option from the available date format list.

   By default, the date appears in the following format: `yyyy/dd/mm`.

8. Click **Save**.

Configuring Properties of a Field with Radio Button or Checkbox View

If you want to display multiple options for a field but receive a single input, configure the radio button or checkbox view for the field.

1. In a section, select the field that you want to configure.

   The **Properties** panel for the field appears.

2. Select **Radio button** or **Checkbox**.

3. To set the field as a required field, select **Required**.

4. To hide the field on the page, select **Hidden field**.

5. To set the field as a read-only field, select **Read-only**.

6. Click **Save**.

Configuring Properties of a Field with Drop-down List View

If you want to display multiple options and store one or more inputs, configure the drop-down list view for the field.

1. In a section, select the field that you want to configure.

   The **Properties** panel for the field appears.

2. Select **Drop-down list**.

3. To set the field as a required field, select **Required**.

4. To hide the field on the page, select **Hidden field**.

5. To set the field as a read-only field, select **Read-only**.

6. Click **Save**.

Configuring Properties of a One-to-Many Field with Card or Grid View

You can display a one-to-many field in a card or grid layout. The card view displays the selected one-to-many field and its child fields in a form layout. The grid view displays the selected one-to-many field and its child fields in a tabular format.

1. In a section, select the one-to-many field that you want to configure.

   The **Properties** panel for the field appears.

2. In the **Tooltip** field, enter a description for the selected one-to-many field.

3. Select one of the following options:

   - Card. Displays a one-to-many field and its child fields in a card view.

   - Grid. Displays a one-to-many field and its child fields in a grid view.

   For each selected field, you can choose how many child fields to display per page using the Items Per Page menu.

4. To set the node or a field as a required field, select **Required**.

5. If you want to let the portal user switch between card and grid views, select **Enable switching between card and grid views**.

6. If you want to validate the input values of the field, select **Enable validation**.

   Choose to validate a one-to-many field or multiple one-to-many fields in both Card and Grid views:

   - **Validate a one-to-many field:** Edit field in a card or grid and click **Validate**. Review the validation message. Click **Save** before you navigate to the next page.

   - **Validate multiple one-to-many fields:** Edit fields on multiple cards or grids and click **Save** to save the page. Review the validation messages.

7. To hide the business entity name for a child node of a business entity, select **Hide header for the selected child node of the Business Entity** under the Properties section on the Design Layout tab.

8. To sort the values of a one-to-many field, in the **Sort Properties** section, configure the following fields:

   - Sort By. Sort the values based on the selected child field.

   - Order. Sort the values in ascending or descending order.

9. To filter the values of a one-to-many field, in the **Filter Properties** section, configure the following fields:

   - Field. The field based on which you want to set the filter criteria.

   - Operator. A condition that defines the filter criteria.

   - Value. The value based on which you want to filter the records.

10. To highlight the values of a one-to-many field, in the **Highlight Properties** section, configure the following fields:

    - Field. The field based on which you want to highlight the value.

    - Operator. A condition that defines the filter criteria.

- Color. Color to highlight the value of the field.

11. Click **Save**.

Configuring Properties of a Field with Checkbox List View

If you want to display a one-to-many field and its child fields as a list of checkboxes, configure the checkbox list view for the field. For example, if you want the portal user to select multiple product categories in a page that shows various product categories, use the checkbox list view.

Note: When the portal users select a parent field within a hierarchy, all its child fields get selected by default. However, when the portal users select only the child fields within a hierarchy, the selection remains limited only to the child fields. The parent of those child fields does not get selected by default.

1. In a section, select the one-to-many field that you want to configure.

   The **Properties** panel for the field appears.

2. Select **Checkbox list**.

3. Select a lookup field that contains the values you want to display as a list of check boxes.

4. To display the field values in a hierarchical format, select a parent lookup field.

5. To set the node or a field as a required field, select **Required**.

6. Click **Save**.

   The following image shows a sample of the checkbox list view on a portal:
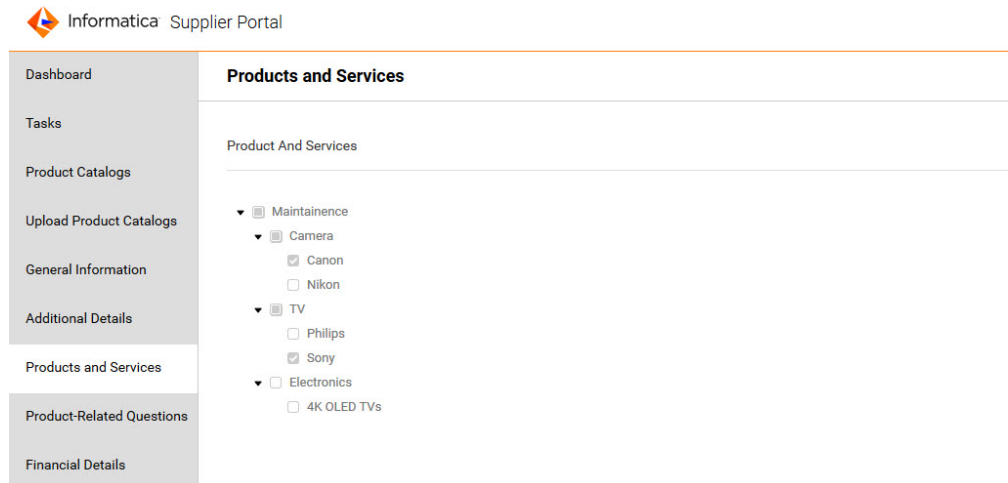
## Configuring Properties of a Field with Dynamic Card View

If you want to display fields based a lookup field, configure dynamic card view for a one-to-many field. When you use dynamic card view on a one-to-many field, select a child field of the one-to-many field as a lookup. The portal can then populate the fields based on the values of the lookup reference you select.

1. In a section, select the one-to-many field that you want to configure.

   The **Properties** panel for the field appears.

2. Select **Dynamic card**.

3. Configure the following properties:

Property Name	Description
Dynamic Card On	Name of the one-to-many field based on which you want to create the dynamic card.
Lookup Field	Lookup field based on which you want to display the fields. For example, the lookup field contains account types, such as Savings Account and Current Account. The card displays Savings Account and Current Account as fields.
Enable field grouping	Indicates whether you want to group the fields based on a lookup field. For example, you have a set of questions. You want to categorize the questions based on products. You can enable this option to categorize the questions based on a lookup field that contains the list of products. You get this option only when you select a child one-to-many field for the dynamic card view.
Field Containing Group Values	Required only when you enable field grouping. Lookup field based on which you want to group the fields in the card.
Enable advanced field configuration	Indicates whether you want to dynamically override the properties of the fields that you want to view.
Field Containing Labels	Lookup field containing the labels for the fields that you want to view. This field is available if you enable advanced field configuration.
Field Containing Required Indicator	Lookup field containing the values that indicate whether the field is required. This field is available if you enable advanced field configuration.
Field Containing Data Types	Lookup field containing the data types for the input values. This field is available if you enable advanced field configuration.
Field Containing Lookup Values	Required only if you select lookup data type. Lookup field containing the lookup values for the field. For example, you have a set of questions. To provide predefined options to the portal user, specify the field that contains options for the question. This field is available if you enable advanced field configuration.
Field to Store Input Values	Name of the field to store the input values that a portal user enters in the card. This field is available if you enable advanced field configuration.

The following image shows a sample configuration of the dynamic card view for product-related questions in a preconfigured portal:
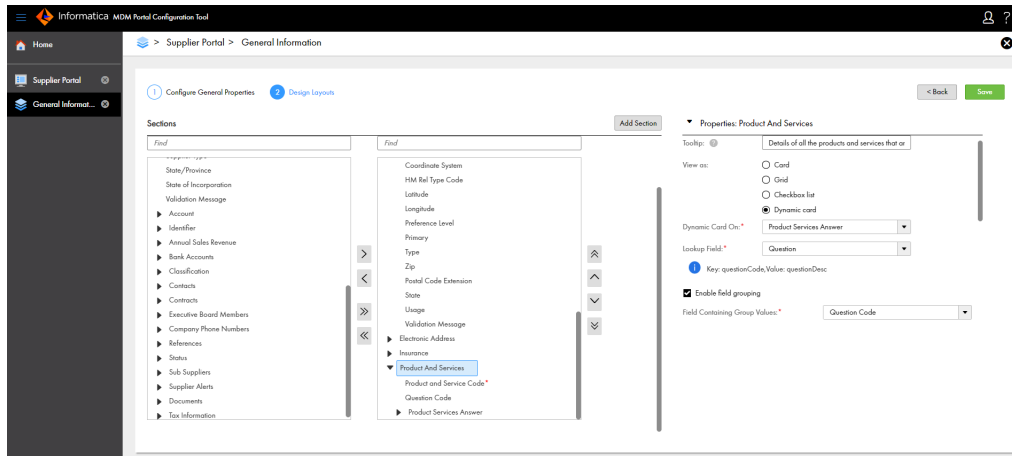
4. Click **Save**.

The following image shows a sample dynamic card for the Product-Related Questions page of a preconfigured portal:

Configure Searchable Lookup Fields

You can configure a Business Entity field as a searchable lookup field.

A user can specify a Business Entity record as the value of the searchable lookup field in the Supplier or Customer Portal pages.

Searchable Lookup Overview

You can use the Searchable Lookup feature to specify a Business Entity record as the value of the searchable lookup field.

Ensure that a foreign key relationship exists between the parent Business Entity of the searchable lookup field and the related Business Entity whose records you want to specify as the value of the searchable lookup field.

For more information about foreign key relationships, see the *Multidomain MDM 10.5 HotFix 2 Data Director User Guide*.

Configure the Searchable Lookup Field Properties

You can configure the searchable lookup field properties to customize the filter fields and the search result fields. The search result fields are the associated Business Entity's fields that appear when you edit the searchable lookup field in the Supplier or the Customer portal pages. The filter fields are the filter criteria that a user can use to filter the associated Business Entity records in the Supplier or the Customer portal pages.

To configure the searchable lookup field properties, perform the following steps:

1. In a section, select the searchable lookup field.

   The **Properties** panel for the field appears. The following additional fields display in the **Properties** panel for searchable lookup fields:
   - Selected Filter Criteria
   - Selected Entity Search Results Columns
   - Customize Search Query

2. Select **Customize Search Query**.

   The **Filter Criteria** and **Entity Search Results Columns** appear.

3. Expand the Business Entity in the **Available Fields:** column.

   This is the Business Entity that is associated with the searchable lookup field.

4. Select the required Business Entity fields as the filter criteria. You can enter a default value or specify a default value from the list for the filter fields if required.

   The selected filter fields appear in the right pane. These fields appear as filters for filtering the Business Entity records in the Supplier or Customer portal pages. If you specify default values in the filter fields, the Business Entity records for the searchable lookup field appear based on the default filter field values in the Supplier or Customer portal pages.

5. In the **Entity Search Results Columns**, select required fields from the available fields.

   The field that you specified as the lookup display field in the Provisioning tool appears by default in the **Selected Fields** column. The fields that you select also appear in the **Selected Fields** column. These are the fields of the Business Entity that you associate as the searchable lookup field value.

   Note: The fields of child business entities appear in the **Filter Criteria** section but they don't appear in the **Entity Search Results Columns** section. You can select the fields of child business entities as filters but you can't select these fields in the **Entity Search Results Columns** section.

6. Click **OK**.

   You can view the number of fields in the **Selected Filter Criteria** and **Selected Entity Search Results Columns** fields in the **Properties** panel of the searchable lookup field.

7. Click **Save**.

   Note: You can't save the field properties if the **Filter Criteria** and **Entity Search Results Columns** are empty.

   The users can search for Business Entity records and select a record from the search results to assign it as the value for the searchable lookup field in the Supplier or Customer portal pages.

Conditional Fields Based on a Field Value Overview

You can configure the visibility of conditional fields in the Supplier or Customer portal pages based on field values. When you configure the field properties, you can enable an option to create conditions based on selected field values. The conditions define the set of conditional fields and the visibility of the conditional fields based on the selected field values.

When a user specifies a field value in the Supplier or Customer portal pages, the visibility of the conditional fields is based on the conditions that you configure.

Conditional Fields Example

You can configure the display of conditional fields for each supplier type. You can configure different sets of fields based on whether you classify suppliers as internal or external.

You can establish conditional fields for each country. The list of fields that appear in the Supplier or Customer portal pages varies with the country and the corresponding settings that you configure.

Prerequisites

You can configure the conditional fields for Business Entity fields that utilize either the option button, check box, or list values.

You cannot configure conditional fields for fields with Text Field or Text Area views and for dependent fields.

For more information about views, see *Views for Business Entity Fields*.

Rules and Guidelines for Configuring Conditional Fields

Consider the following rules and guidelines before you configure conditional fields:

- You can add multiple conditions for a field.
- Allocate one condition for one or more field values. Once assigned, the field value doesn't appear in the next selection of the Conditional Value list.
- Fields that function as conditional fields for other fields can't activate the **Enable Conditional Fields** option.
- If fields are previously configured as conditional fields, the fields are absent from the **Visibility Fields** list. Avoid designating such fields as conditional fields.

Configuring Conditional Fields Based on Field Values

During the configuration of selected field properties, you can establish conditions for conditional fields.

To configure conditional fields based on selected field properties, perform the following steps:

1. In a section, select the field to configure conditional fields.

    The **Properties** panel for the field appears.
2. To create conditions based on field values, select **Enable Conditional Fields**.

    Note: The **Enable Conditional Fields** check box is unavailable for fields with **Text Field** or **Text Area** views and dependent fields.

    The **Conditional Fields** section appears.
3. Select **Add** to add a new row in the **Conditional Fields** section.

4. Configure the following properties for the conditional fields:

Property	Description
Conditional Value	Select one or more field values to determine the visibility of the conditional fields in the Supplier or Customer portal pages. You can configure a set of conditional fields for one or more field values.
Visibility Fields	Select the conditional fields from the list. The fields that you select will adjust their visibility in the Supplier or Customer portal pages based on the field values. The previously selected conditional fields are not available for selection. **Note:** You can't select **Required** or **Hidden** fields as conditional fields.
Visibility Status	Determines whether the conditional fields selected in Visibility Fields should appear or be hidden in the Supplier or Customer portal pages.

5. Select **Add** to create a condition for another field value of the selected field and go to Step 4.

6. To create conditions for other fields, choose the required field in the selected fields section and repeat Steps 2 through 4.

    If you previously configured a field as a conditional field for some other field, the **Enable Conditional Fields** check box is inactive.

7. After you configure conditional fields for required fields, click **Save**.

    The visibility of conditional fields is based on the field value that the user specifies in the Supplier or Customer portal pages.

CHAPTER 5

Managing a Portal

This chapter includes the following topics:

Managing a Portal Overview

After you create a portal, you can start the portal to deploy it. You can copy the URL of the portal to check how the portal looks. If you want to reconfigure any page, you can stop the portal and edit it.

You can export the portal configuration to a ZIP file so that you can share it with other users. You can also import a portal configuration.

Before you start a portal, ensure that you verify the default runtime configuration settings and configure them according to your requirement.

Configuring the Runtime Settings for a Portal

The runtime settings include timeout interval, password reset link expiry time, and password policy.

1. In the Portal Configuration tool, click the **Action** icon on the portal for which you want to configure the runtime settings.

2. Select **Runtime Settings**.

   The **Runtime Settings** page appears.

3. Configure the following settings:

Session Timeout Interval

Idle time after which a login session times out. Default is 420 minutes.

Session Timeout Warning Time

Number of minutes before a session times out you want to display a warning message. Default is 60 minutes.

Password Reset Link Expiry Time

Time period after which the password reset link must expire. Use the hh:mm:ss format. Default is 1:00:00.

Password Policy

Password policy that you want to use for the portal. The policy appears in the sign up page.

Username

Name of the user with administrative privileges to access the portal.

Note: Ensure that you add a unique administrator user for the portal.

Starting a Portal

After you start the portal, the portal is deployed, and you can access the portal with the portal URL.

1. In the Portal Configuration tool, click the **Action** icon on the portal that you want to start.
2. Select **Start Portal**.

   If the portal is deployed successfully, you get a green icon on the portal.
3. To get the portal URL, click the **Action** icon on the portal, and select **Copy URL**.

   The portal URL is copied to the clipboard. You can paste the URL in your browser.

Stopping a Portal

You can stop a portal that is already deployed. After you stop the portal, the users cannot access the portal.

1. In the Portal Configuration tool, click the **Action** icon on the portal that you want to stop.
2. Select **Stop Portal**.

   You get a red icon on the portal.

Editing a Portal

If you plan to edit a portal that is already deployed, ensure that you stop the portal before you edit it.

Note: For more information about stopping the portal, see .

1. In the Portal Configuration tool, click the **Action** icon on the portal that you want to edit.
2. Select **Edit**.

   The portal configuration is available in the edit mode.
3. To edit the portal settings, perform the following tasks:

   a. Click **Portal Settings**.

      The portal configuration is available in the edit mode.

   b. Edit the required settings, and click **Save**.
4. To edit a page, perform the following tasks:

   a. Click the page that you want to edit.

      The page is available in the edit mode.

   b. Edit the page configuration, and click **Save**.

Exporting a Portal

You can export a portal as a ZIP file and share the portal configuration with other users.

1. In the Portal Configuration tool, click the **Action** icon on the portal that you want to export.
2. Select **Export**.

   The portal configuration is downloaded as a ZIP file.

Importing a Portal

You can import a portal as a ZIP file. When you import a portal, you can create a portal or replace an existing portal.

1. In the Portal Configuration tool, click **Import Portal**.

   The **Import Portal** dialog box appears.
2. Navigate to the ZIP file that you want to import.
3. Select the Operational Reference Store for the portal to use.
4. Select the source system for the portal to use.
5. If you want to replace an existing portal, perform the following tasks:

   a. Select **Replace an existing portal**.

   b. Select the portal that you want to replace.
6. If you want to create a portal, enter an unique name for the portal.

7. To enable external authentication for the portal, click **Yes**.

8. Click **Import**.

   The selected portal is imported.

Configuring Single Sign-On for a Portal

Single sign-on is an authentication service that allows a user to use one set of credentials to access multiple applications. It allows users to sign in to an identity provider application for authentication and grants access to other applications your service provider hosts.

An identity provider is an entity that manages authentication information and provides authentication services through the use of security tokens. For example, Microsoft Azure, Okta, or Salesforce. A service provider is an entity that provides web services to users. For example, an entity that hosts web applications. You can configure single sign-on for the portal you create or import through the Portal Configuration tool. You must enable external authentication to configure single sign-on when you create or import a portal.

Note: Before you configure single sign-on, ensure that you add the provider property `provider.type` and set its value to `SAML` in **Portal Login Module** in Security Providers tool of the Hub Console.

1. On the **Home** page, select the portal for which you want to configure single sign-on.

2. Click the **Action** icon on the portal, and select **SSO Configurations**.

   Note: The **SSO Configurations** option appears only on published portals.

   When you configure for the first time, the **SSO Quick Setup Steps** dialog box appears.

3. Read through the instructions, and click **OK**.

   Note: To see the quick setup steps again, click **SSO Quick Setup Steps** in the **Service Provider Settings** section.

4. Click **Download Service Provider Metadata**.

   The service provider metadata XML file is downloaded.

5. To digitally sign in the authentication request before sending it to your identity provider, select **Sign Authentication Request**.

6. To digitally sign in the log out request before sending it to your identity provider, select **Sign Logout Request**.

7. Upload the service provider metadata file to your identity provider application. For example, to upload the service provider metadata file to Microsoft Azure, perform the following steps:

   a. Log in to Microsoft Azure portal.

   b. Select the enterprise application that you want to configure.

   c. Click **Set up single sign on**.

      The **Select a single sign-on method** page appears.

   d. Click **SAML**.

      The **Set up Single Sign-On with SAML** page appears.

   e. Click **Upload metadata file**.

   f. Navigate to the service provider metadata file that you downloaded, and click **Add**.

The **Basic SAML Configuration** page appears displaying values from the service provider metadata file.

Note: If the upload fails and the values do not appear on the **Basic SAML Configuration** page, navigate to the **Set up Single Sign-On with SAML** page and click **Edit** to add the values manually from the service provider metadata file.

    g.   To redirect the user to a page after the user logs out, enter a logout URL.

    h.   Click **Save** and **Close**.

    i.   Download the federation metadata XML file from the **SAML Signing Certificate** section on the **Set up Single Sign-On with SAML** page.

8.   In the **Identity Provider Settings** section of the Portal Configuration tool, click **Choose File**.

9.   Navigate to the federation metadata XML file that you downloaded, and click **Open**.

Note: By default, the **NameID** element is mapped to the **User Name Mapping** field. You can also map the path to the email address in the **User Name Mapping** field.

The fields in the **Identity Provider Settings** section populates with values from the federation metadata XML file.

10.   Click **Save**.

CHAPTER 6

Localizing a Portal

This chapter includes the following topics:

Localizing a Portal Overview

After you create a portal, you can localize the portal resources, such as the portal title and page labels. You can export the language bundle file that the portal uses, get them localized, and then import them back to the portal.

To localize the portal, perform the following steps:

1. Export the language bundle for localization.

2. Import the localized language bundle.

Exporting the Language Bundle

The language bundle is a ZIP file that contains language file for each language. Each language file contains the portal labels in the corresponding language.

1. In the Portal Configuration tool, click the **Action** icon on the portal that you want to export.

2. Select **Localization** > **Export Language Bundle**.

    The language bundle is downloaded as a ZIP file.

Importing the Language Bundle

After you export the language bundle, you can update the language files with the localized strings. After you update the language files, you can import the updated language bundle file so that the localized strings are available in the portal.

Before you import a language bundle, ensure that the portal is not in the draft state.

1. In the Portal Configuration tool, click the **Action** icon on the portal that you want to import.
2. Select **Localization** > **Import Language Bundle**.

    The **Import Language Bundle** dialog box appears.
3. Navigate to the language bundle ZIP file that you want to import.
4. Click **Import**.

    Note: For the imported language bundle to take effect, you must stop the portal and then start it.

Supporting Additional Languages

You can support additional languages for the portal based on your business needs and the geographical region. For example, to support portal users in Eastern Europe, you can add Russian, Polish, Czech, or other Eastern European languages to the language bundle. After you add the languages and deploy the portal, the portal users can view the portal in the language of their choice.

1. Localize the following Customer 360 resources and custom resources to the language that you want:

    *   Labels and error messages
    *   Metadata
    *   Lookup table

    For more information about localizing Customer 360 resources and custom resources, see the *Informatica MDM - Customer 360 Installation and Configuration Guide*.
2. Export the language bundle from the Portal Configuration tool.

    For more information, see .

    The language bundle is downloaded as a ZIP file.
3. To add a language to the portal, save a copy of the `bundle.properties` and `errors.properties` files either with the corresponding language code and country code or with the language code only.

    For example, to add support for the German language, save a copy of the `properties` files with the following names:

    *   `bundle_de.properties`
    *   `error_de.properties`

    To add support for the German dialect spoken in Austria, save a copy of the `properties` files with the following names:

    *   `bundle_de_at.properties`
    *   `error_de_at.properties`
4. In a text editor, open the corresponding localized files and add the localized string values to the files.
5. Compress the updated localized files to a ZIP file.

6. Import the language bundle to the Portal Configuration tool.

    For more information, see "Importing the Language Bundle" on page 47.

7. To generate JSON files for the corresponding localized bundle files, perform the following steps:

    a. At the command prompt, navigate to the following directory:

        `<MDM installation directory>/app/portal`

    b. Extract the contents of the `generic-portal.ear` file.

    c. Navigate to the directory that contains the extracted files.

    d. Extract the contents of `mdm.ui-portal-ui-0.0.1.war` and `mdm.ui-portal-config-0.0.1.war` files.

    e. Navigate to the `locales` folder in the directories that contain the extracted files.

    f. Use the English language JSON file, `translation_en.json`, as a reference and generate the JSON files for the respective localized bundle files.

        For example, if the `PRODUCT_NAME` key in the English language JSON file contains the value `MDM Portal Configuration Tool`, then ensure that the corresponding key in the German JSON file contains the localized version `MDM-Portal-Konfigurationstool` as the value.

        Note: Ensure that the generated JSON files have all the values localized in the language that you want. Also, use the following formats to name the JSON files:

        - `translation_<lang_key>.json`
        - `translation_<lang_key>_<country_code>.json`

    g. Add the JSON files that you generate to the respective `locales` folders.

8. Generate the `generic-portal.ear` with the newly added JSON files.

9. To update the changes, deploy the portal again.

    For more information, see Chapter 8, "Deploying a Sample Portal" on page 53.

C H A P T E R 7

# Customizing a Portal

This chapter includes the following topics:

Customizing a Portal with Color Settings Overview

You can modify the color settings of the Portal UI to customize the Portal UI appearance. Color settings that you modify are applicable for all the pages in the Portal UI.
You can modify the `custom.css` file to set the color of the UI sections to any valid CSS color code and deploy the changes.

The following images highlight the UI sections open to customization:
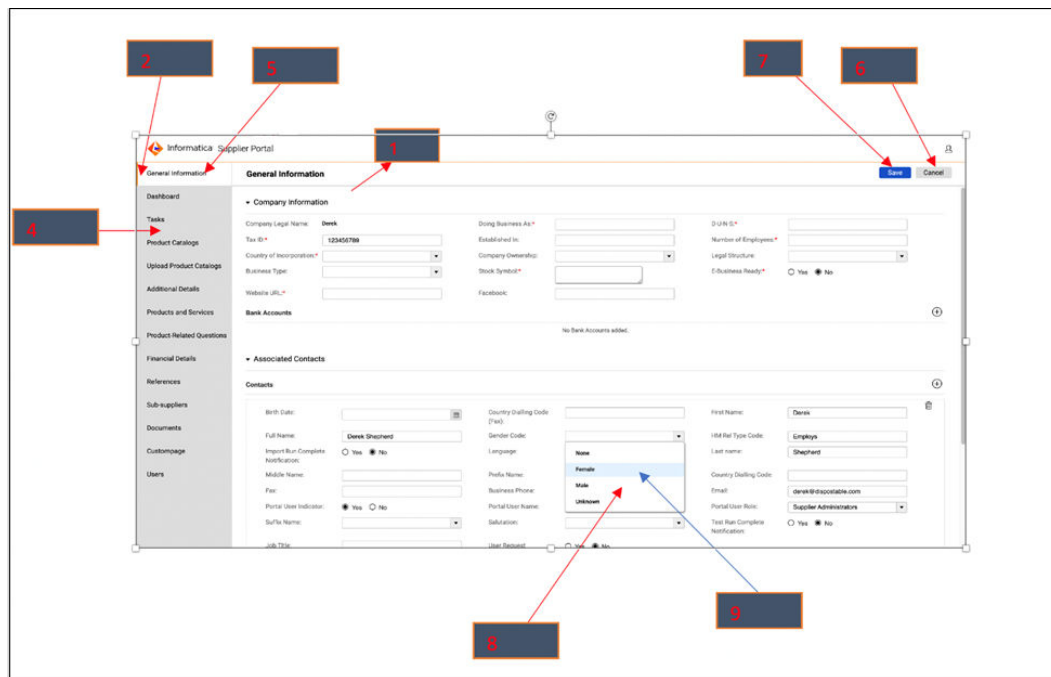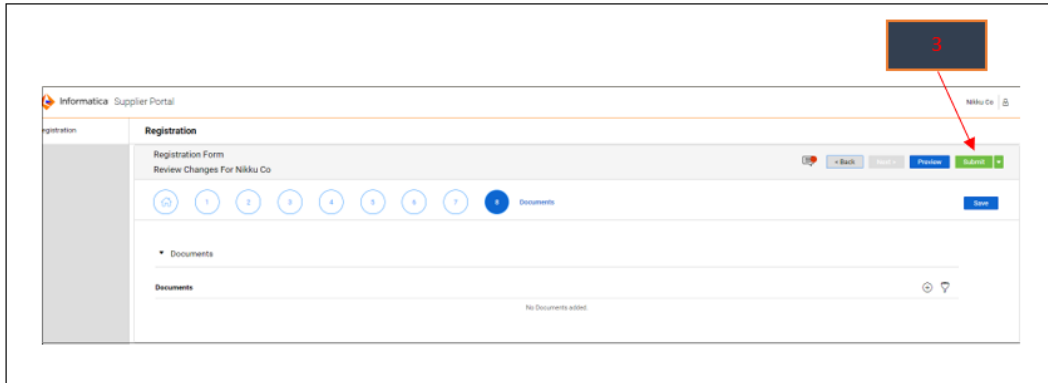
Customize Color Settings

You can modify the color settings of the UI sections to any valid CSS color code. For example, to change background color of unselected tabs to **AliceBlue**, set the property `--app-nav-item-background-color` to **#F0F8FF**.

The following table displays the properties you can modify in the `custom.css` file to customize the color settings for each Portal UI section:

S.No	Property	Description
1.	--app-header-bottom-border-color	Modifies the color of the bottom border of the header. Default is **#ff800e**. For example, set the property to **#F0F8FF** for **AliceBlue**.
2	--app-nav-item--selected-leftbar-color	Changes the color of the vertical orange line on the left side of the selected tab. Default is **#ff800e**.
3.	--app-call--to-action--background-color	Changes the background color of action buttons. For example, Save button. Default is **#70be44**.
	--app-call--to-action--text-color	Alters the text color of action buttons. Default is **#fff**.
	--app-call--to-action--hover-background-color	Changes the hover background color of action buttons. Default is **#d4edb1**.
	--app-call--to-action--hover-text-color	Modifies the hover text color of action buttons. Default is **#fff**.
4.	--app-nav-item-background-color	Changes the background color of unselected tabs. Default is **#ddd** .
	--app-nav-item-text-color	Modifies the text color of unselected tabs. Default is **#000**.
5.	--app-nav-item-selected-background-color	Changes the background color of selected tabs. Default is **#fff**.
	--app-nav-item-selected-text-color	Changes the text color of selected tabs. Default is **#000**.

S.No	Property	Description
6.	--app-secondary-button--text-color	Changes the text color of secondary buttons. Default is **#000**.
	--app-secondary-button--background-color	Changes the background color of secondary buttons. Default is **#ddd** .
	--app-secondary-button--border-color	Modifies the border color of secondary buttons. Default is **#4996f3**.
	--app-secondary-button--hover-text-color	Modifies the hover text color of secondary buttons. Default is **#000**.
	--app-secondary-button--hover-border-color	Modifies the hover border color of secondary buttons. Default is **#9c9c9c**.
	--app-secondary-button--hover-background-color	Changes the hover background color of secondary buttons. Default is **#ddd**.
7.	--app-primary-button--background-color	Changes the background color of primary buttons. Default is **#0d66d0**.
	--app-primary-button--border-color	Modifies the border color of primary buttons. Default is **#0a4fc7**.
	--app-primary-button--text-color	Modifies the text color of primary buttons. Default is **#fff**.
	--app-primary-button--hover-text-color	Modifies the hover text color of primary buttons. Default is **#fff**.
	--app-primary-button--hover-border-color	Modifies the hover border color of primary buttons. Default is transparent.
	--app-primary-button--hover-background-color	Changes the hover background color of primary buttons. Default is **#0d66d0**.
8.	--app-dropdown-item--background-color	Changes the background color of the dropdown menu item. Default is **#fff**.
	--app-dropdown-item--text-color	Modifies the text color of the dropdown menu item. Default is **#000**.
9.	--app-dropdown-item--hover-background-color	Changes the hover background color of the dropdown menu item. Default is **#f5fafe**.
	--app-dropdown-item--hover-text-color	Modifies the hover text color of the dropdown menu item. Default is **#000**.
	--app-dropdown-item--hover-border-color	Changes the hover border color of the dropdown menu item. Default is **#e3f1ff**.

Perform the following steps to modify `custom.css` file:

1. Navigate to the following path in your system: `<INFA_HOME>\app\portal\styles`
2. Modify the `custom.css` file to change the color settings of the Portal UI.

3. Save the changes.

4. Navigate to the following path: `<INFA_HOME>\app\porta\bin`

5. Run `install-portal.bat` or `install-portal.sh` file to deploy the changes. For more information on how to deploy changes, refer https://docs.informatica.com/master-data-management/supplier-360/10-5-hotfix-2-sp-1/installation-and-configuration-guide/installing-the-supplier-360-components/installing-the-portal-configuration-tool.html

CHAPTER 8

Deploying a Sample Portal

This chapter includes the following topics:

Requirements of the Sample Supplier Portal

You work for a medical equipment manufacturer. The company procures raw materials from numerous suppliers. The management team finds it difficult to onboard new suppliers and maintain the supplier information.

You propose to create a supplier portal to onboard new suppliers. The suppliers can use the portal to sign up and initiate a relationship with your organization. After business users in your organization approve a supplier, the supplier uses the portal to upload documents and update the required information.

For the proposed supplier portal, you come up with the following requirements:

- Capability for the suppliers to sign up using a sign up page.
- Capability for the suppliers to log in to the portal using a login page.
- Capability for the suppliers to self-register using a registration page.
- Capability for the suppliers to provide additional details about them.
- Capability for the suppliers to manage users by adding or removing additional users.
- Capability to display pages based on the status of the supplier record. After suppliers submit their application, the portal must not allow them to edit their applications until they are approved.

Creating the Sample Portal

You can create a portal with multiple pages, such as sign up page, log in page, and registration page. You can configure the business entity fields from which you want retrieve and store data.

1. Log in to the Portal Configuration tool.

   For more information about logging in to the Portal Configuration tool, see "Logging In to the Portal Configuration Tool" on page 8.

2. Click **Create Portal**.

   The **General** page appears.

3. Configure the general settings of the portal, such as portal title and business entity.

   For more information about configuring general settings, see "Configuring the General Settings for the Portal" on page 13.

4. To configure the portal to display pages based on the status of the portal user, set the **Enable Portal State** field to Yes and then configure the state settings.

5. Click **Next**.

   The **Log In** page appears.

6. Configure the log in page settings for the portal, such as email address and user name.

   For more information about configuring the log in page settings, see "Configuring the Log In Page Settings for the Portal" on page 15.

7. Click **Next**.

   The **User Creation** page appears.

8. Configure the user creation details to store the user details.

   For more information about configuring the user creation page settings, see "Configuring the User Creation Page Settings for the Portal" on page 16.

9. To enable creation of additional users, select **Create additional users** and configure the settings on the **Additional Users** tab.

10. Click **Next**.

    The **Registration** page appears.

11. Configure the registration settings, such as default user role and default portal state.

    Note: To allow the users to sign up online, ensure that you clear the **Disable Signup** check box

    For more information about configuring registration page settings, see "Configuring the Registration Page Settings for the Portal" on page 18.

12. Click **Save**.

You have successfully created a portal as per your business requirements.

Adding Pages to the Sample Portal

After you create a portal, you can add pages based on your business requirements.

1. On the portal home page, click **Create Page**.

   The **Configure General Properties** page appears.

2. Add the required components and configure the component settings.

3. Add the required fields and configure the field properties.

4. Click **Save**.

   For more information about adding pages, see Chapter 4, "Adding Pages to Portal" on page 20.

Starting the Sample Portal

When you start the portal, the portal is deployed, and you can access the portal with the portal URL.

1. In the Portal Configuration tool, click the **Action** icon on the portal that you want to start.

2. Select **Start Portal**.

   If the portal is deployed successfully, you get a green icon on the portal.

3. To get the portal URL, click the **Action** icon on the portal, and select **Copy URL**.

   The portal URL is copied to the clipboard. You can paste the URL in your browser.

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