



Informatica® MDM - Customer 360
10.4 HotFix 3

Portal Configuration Tool Guide

Informatica MDM - Customer 360 Portal Configuration Tool Guide
10.4 HotFix 3
October 2021

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Preface

Use the *Informatica® MDM - Customer 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.

Informatica Resources

Informatica provides you with a range of product resources through the Informatica Network and other online portals. Use the resources to get the most from your Informatica products and solutions and to learn from other Informatica users and subject matter experts.

Informatica Network

The Informatica Network is the gateway to many resources, including the Informatica Knowledge Base and Informatica Global Customer Support. To enter the Informatica Network, visit <https://network.informatica.com>.

As an Informatica Network member, you have the following options:

- Search the Knowledge Base for product resources.
- View product availability information.
- Create and review your support cases.
- Find your local Informatica User Group Network and collaborate with your peers.

Informatica Knowledge Base

Use the Informatica Knowledge Base to find product resources such as how-to articles, best practices, video tutorials, and answers to frequently asked questions.

To search the Knowledge Base, visit <https://search.informatica.com>. If you have questions, comments, or ideas about the Knowledge Base, contact the Informatica Knowledge Base team at KB_Feedback@informatica.com.

Informatica Documentation

Use the Informatica Documentation Portal to explore an extensive library of documentation for current and recent product releases. To explore the Documentation Portal, visit <https://docs.informatica.com>.

If you have questions, comments, or ideas about the product documentation, contact the Informatica Documentation team at infa_documentation@informatica.com.

Informatica Product Availability Matrices

Product Availability Matrices (PAMs) indicate the versions of the operating systems, databases, and types of data sources and targets that a product release supports. You can browse the Informatica PAMs at <https://network.informatica.com/community/informatica-network/product-availability-matrices>.

Informatica Velocity

Informatica Velocity is a collection of tips and best practices developed by Informatica Professional Services and based on real-world experiences from hundreds of data management projects. Informatica Velocity represents the collective knowledge of Informatica consultants who work with organizations around the world to plan, develop, deploy, and maintain successful data management solutions.

You can find Informatica Velocity resources at <http://velocity.informatica.com>. If you have questions, comments, or ideas about Informatica Velocity, contact Informatica Professional Services at ips@informatica.com.

Informatica Marketplace

The Informatica Marketplace is a forum where you can find solutions that extend and enhance your Informatica implementations. Leverage any of the hundreds of solutions from Informatica developers and partners on the Marketplace to improve your productivity and speed up time to implementation on your projects. You can find the Informatica Marketplace at <https://marketplace.informatica.com>.

Informatica Global Customer Support

You can contact a Global Support Center by telephone or through the Informatica Network.

To find your local Informatica Global Customer Support telephone number, visit the Informatica website at the following link:

<https://www.informatica.com/services-and-training/customer-success-services/contact-us.html>.

To find online support resources on the Informatica Network, visit <https://network.informatica.com> and select the eSupport option.

CHAPTER 1

Introduction to Portal Configuration Tool

This chapter includes the following topics:

- [Portal Configuration Tool Overview, 7](#)
- [Logging In to the Portal Configuration Tool, 7](#)

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, 9](#)
- [Importing the Preconfigured Portal, 9](#)
- [Editing a Portal, 10](#)
- [Starting a Portal, 10](#)

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 7](#).
2. Click **Import Portal**.
The **Import Portal** dialog box appears.
3. Navigate to the following directory:
`<MDM Installation Directory>/app/tcr/CustomerB2BPortal`
4. Select the `CustomerB2BPortalConfig.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 [“Stopping a Portal” on page 36](#).

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, 11](#)
- [Portal State Management, 11](#)
- [Creating a Portal, 12](#)

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 or 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 7](#).

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.
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.

- 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.

- 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.

- 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.

- 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.
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.

Field	Description
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.
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.
Note: If you want to hide the section name, select **Hide header**.
 - 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: If you want 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, 18](#)
- [Type of Pages, 18](#)
- [Type of Views, 19](#)
- [Creating a Record Page, 21](#)
- [Creating a Custom Page, 22](#)
- [Configuring Components for a Custom Page, 23](#)
- [Configuring Field Properties, 29](#)

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:

The screenshot shows a web interface for 'Informatica Supplier Portal' with a sidebar menu and a main content area titled 'Financial Details'. The main area contains several data sections:

- Annual Sales Revenue:** A table with columns 'Year', 'Value', and 'Currency'. The row shows '2020', '12567', and 'Armenia Dram'.
- Tax Information:** A form with fields for 'Tax Number Type' (Employer Identification Number), 'Tax Authority / Issuer' (HM Revenue and Customs), 'Country', 'Effective Date', 'Tax Number' (0000), 'Tax Payer Type' (Business Entity), 'State', and 'Expiry Date'.
- Bank Accounts:** A form with fields for 'Account Type' (Joint Account), 'Branch Code' (code), 'Bank Institution' (institution), 'Account Number' (number), 'Branch Name' (name), and 'Account Holder' (holder).
- Insurance:** A form with fields for 'Insurance Type' (Cargo Insurance), 'Currency' (Australia Dollar), 'Valid To' (26/03/2020), 'Limit' (88999.90), 'Provider' (provider), and 'Valid From' (01/03/2020).

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:

The screenshot shows the Informatica Supplier Portal interface. The main content area is titled "Financial Details" and contains several sections:

- Annual Sales Revenue:** A table with columns for Year, Value, and Currency. The data row shows Year: 2020, Value: 12567, and Currency: Armeni Dram.
- Tax Information:** A table with columns for Tax Number Type, Tax Number, Tax Authority / Issuer, Tax Payer Type, Country, State, Effective Date, and Expiry Date. The data row shows Tax Number: 0000, Tax Authority: HSM Revenue and Customs, and Tax Payer Type: Business Entity.
- Bank Accounts:** A table with columns for Account Type, Account Number, Branch Code, Branch Name, Bank Institution, and Account Holder.
- Insurance:** A table with columns for Insurance Type, Limit, Currency, Provider, Valid To, and Valid From. The data row shows Insurance Type: Cargo Insurance, Limit: 88989.90, Currency: Australia Dollar, and Provider: provider.

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.

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

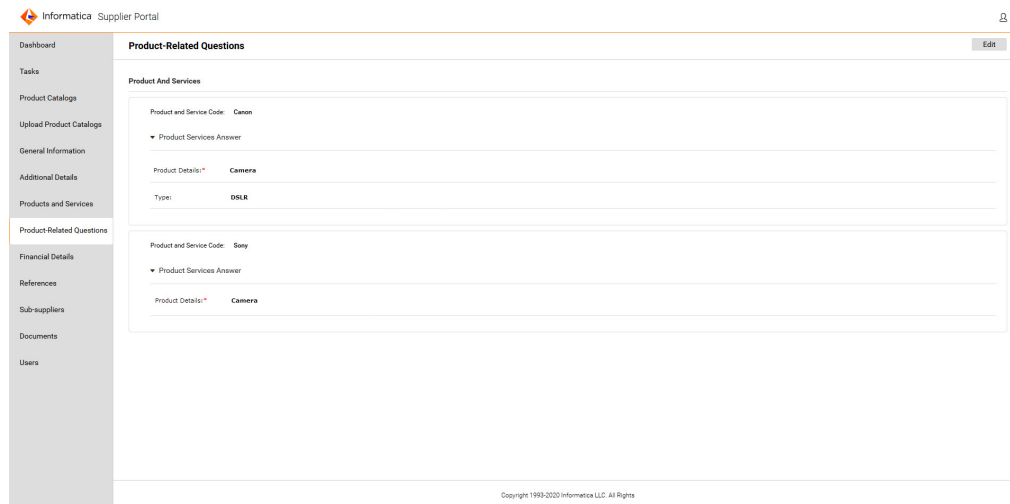
The screenshot shows the Informatica Supplier Portal interface. The main content area is titled "Products and Services" and contains a section for "Product And Services" with a list of categories and their sub-items:

- Maintenance
- Camera
 - Canon
 - Nikon
- TV
 - Philips
 - Sony
- Electronics
 - 4K OLED TVs

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 **General** 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 **Layout Designer** page appears.
4. Enter a name for the default section.

- Note:** If you want to hide the section name, select **Hide header**.
- From the list of available fields, select a field that you want to add to the section, and then click **Add**.
 - 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**.
 - 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 [“Configuring Field Properties” on page 29](#) topic.
 - To add more sections to the page layout, click **Add a section** and repeat step [4](#) through [7](#).
Note: If you want to change the order in which sections appear, click **Move section up** or **Move section down**.
 - 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.

- On the portal home page, click **Create Page**.
The **General** page appears.
- 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 .

- Click **Next**.
The **Layout Designer** page appears.
- Hover the cursor over the section, and then click **Add a Component**.
The **Add a Component** panel appears.
- Hover the cursor over the component that you want to add, and then click **Add**.
- 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 23](#) topic.
- To add more components, repeat steps [4](#) through [6](#).
- To add more sections on the layout, click **Add a Section Below**.

A new section appears below the existing section.

- To add a component to the section, repeat steps [4](#) through [7](#).
- 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.

- Add a wizard component to a section of a custom page.
The wizard component is added to the page.
- Click **Settings**.
- 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: <ul style="list-style-type: none">- 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.

- 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.

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

A step is added.

- Enter a title for the step.

- Enter a name for the section.

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

- 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 29](#) topic.

- To add more steps, repeat steps [5](#) through step [8](#).

- 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:

The screenshot shows the 'Onboarding Form' in the Informatica Supplier Portal. The form is titled 'Onboarding Form' and includes a progress bar with 8 steps. The first step, 'General Information', is active. The form contains various input fields for company information, including Company Legal Name, DUNS, Tax ID, and Country of Incorporation.

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: <ul style="list-style-type: none">- 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.
Business Entity Name	Indicates whether you want to use the business entity of the portal as a parameter to filter the content of the external page.
Row ID	Indicates whether you want to use the Row ID of the records as a parameter to filter the content of the external page.

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: <ul style="list-style-type: none">- 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: <ul style="list-style-type: none">- 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 **General** 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: <ul style="list-style-type: none">- 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: <ul style="list-style-type: none">- 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: <ul style="list-style-type: none">- 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	Descriptive text to display.

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.

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. 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 Field with Card View

If you want to display a one-to-many field and its child fields in a card layout, configure the card view for the field.

1. In a section, select the one-to-many field that you want to configure.
The **Properties** panel for the field appears.
2. Select **Card**.
3. To set the node or a field as a required field, select **Required**.

4. If you want to let the portal user switch between card and grid views, select **Enable switching between card and grid views**.
5. If you want to validate the input values of the field, select **Enable validation**.
6. Click **Save**.

Configuring Properties of a Field with Grid View

If you want to display a one-to-many field and its child fields in a tabular layout, configure the grid view for the field.

1. In a section, select the one-to-many field that you want to configure.
The **Properties** panel for the field appears.
2. Select **Grid**.
Note: 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.
3. If you want to let the portal user switch between card and grid views, select **Enable switching between card and grid views**.
4. If you want to validate the input values of the field, select **Enable validation**.
5. To set the node or a field as a required field, select **Required**.
6. Click **Save**.

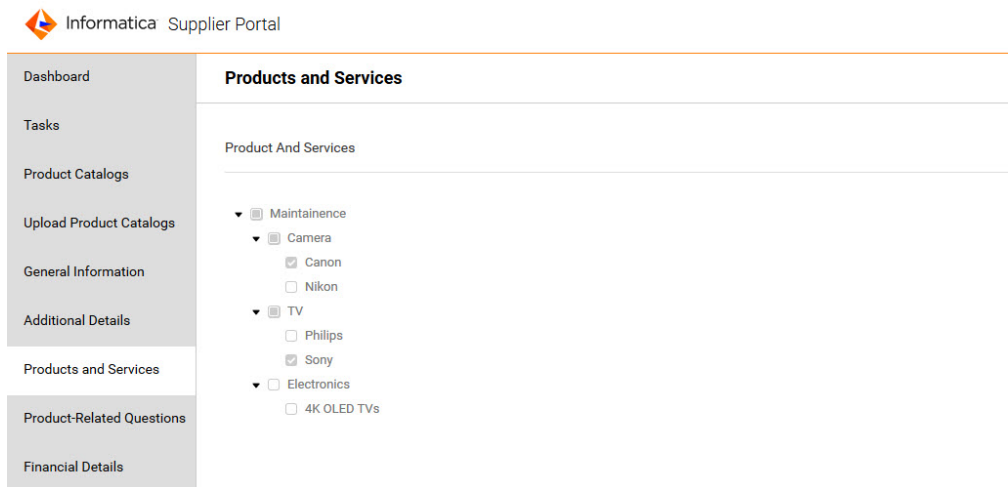
Configuring Properties of a Field with Checkbox List View

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.

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

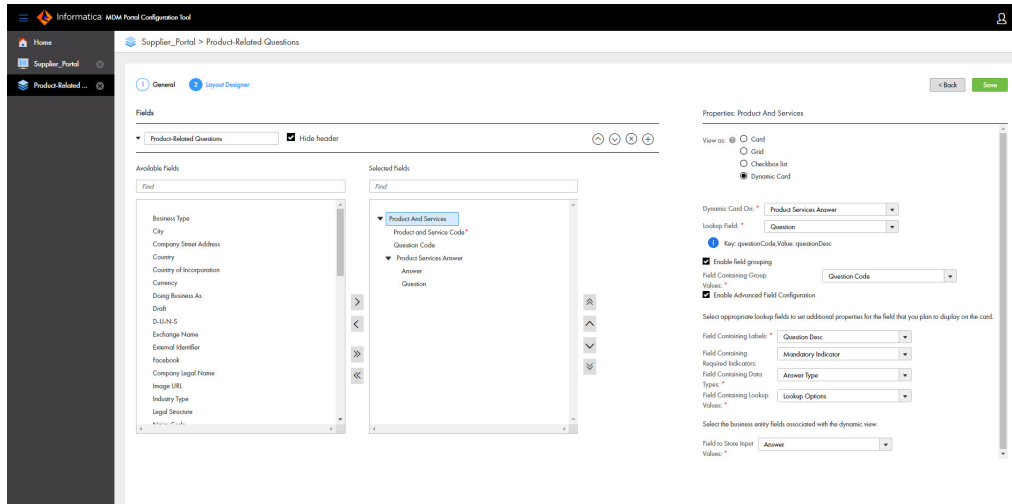
If you want to display fields based a lookup field, configure dynamic card view for a one-to-many field. When you use dynamic card view on a one-to-many field, select a child field of the one-to-many field as a lookup. The portal can then populate the fields based on the values of the lookup reference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

Property Name	Description
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:



CHAPTER 5

Managing a Portal

This chapter includes the following topics:

- [Managing a Portal Overview, 35](#)
- [Configuring the Runtime Settings for a Portal, 35](#)
- [Starting a Portal, 36](#)
- [Stopping a Portal, 36](#)
- [Editing a Portal, 37](#)
- [Exporting a Portal, 37](#)
- [Importing a Portal, 37](#)
- [Configuring Single Sign-On for a Portal, 38](#)

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 [“Stopping a Portal” on page 36](#).

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 or Okta. 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, 40](#)
- [Exporting the Language Bundle, 40](#)
- [Importing the Language Bundle, 40](#)

Localizing a Portal Overview

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

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.

CHAPTER 7

Deploying a Sample Portal

This chapter includes the following topics:

- [Requirements of the Sample Customer Portal, 42](#)
- [Creating the Sample Portal, 43](#)
- [Adding Pages to the Sample Portal, 43](#)
- [Starting the Sample Portal, 44](#)

Requirements of the Sample Customer Portal

You work for a beverages manufacturing company called XYZ Distilleries. Numerous restaurants procure beverages from the company. The management team finds it difficult to onboard new restaurants and maintain the customer information. You propose to create a customer portal to onboard new restaurants. The restaurant representatives can use the portal to sign up and initiate a relationship with your organization as customers. After business users in your organization approve a customer, the restaurant representatives can use the customer portal to onboard their profile into the database of XYZ Distilleries and communicate regarding their interest to procure beverages.

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

- Capability for the customers to sign up using a sign up page.
- Capability for the customers to log in to the portal using a login page.
- Capability for the customers to self-register using a registration page.
- Capability for the customers to provide additional details about them.
- Capability for the customers to manage users by adding or removing additional users.
- Capability to display pages based on the status of the customer record. After customers 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 7](#).
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 12](#).
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 13](#).
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 15](#).
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 16](#).
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 **General** 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 18](#).

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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