OPTIMIZE

MERCURY BUSINESS AVAILABILITY CENTER™

My BAC Administration

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BUSINESS TECHNOLOGY OPTIMIZATION

Mercury Business Availability Center

My BAC Administration

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Administering My BAC

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Welcome to My BAC Administration

This guide describes how you set up My BAC so that users can view content such as Mercury Business Availability Center reports in their portal pages.

How This Guide Is Organized

The guide contains the following chapters:

Chapter 1   Introduction

Describes the actions you can perform to define modules that can be accessed by your users through their My BAC portal.

Chapter 2   Creating a Module

Explains how to create modules that you publish or distribute to users.

Chapter 3   Publishing and Distributing Modules

Explains how to publish and distribute modules so that they will be available to users.

Chapter 4   Working with Module Configurations

Explains how to work with existing modules, for example, to add or delete pages and portlets from a module, to set user access rights to modules, and to copy and delete modules.

Who Should Read This Guide

This guide is intended for the following users of Mercury Business Availability Center:

➤ Mercury Business Availability Center administrators

➤ Mercury Business Availability Center end users

Readers of this guide should be knowledgeable about navigating and using enterprise applications, and be familiar with Mercury Business Availability Center and enterprise monitoring and management concepts.

Getting More Information

For information on using and updating the Mercury Business Availability Center Documentation Library, reference information on additional documentation resources, typographical conventions used in the Documentation Library, and quick reference information on deploying, administering, and using Mercury Business Availability Center, refer to *Getting Started with Mercury Business Availability Center*.

Welcome

1

Introduction

This chapter describes the actions you can perform to define modules that can be accessed by your users through their portals.

This chapter describes:	On page:
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Introduction to My BAC Administration Overview

A user's portal consists of pages and portlets, together called a module. You, the My BAC administrator, create modules, add pages and portlets to them, and publish the modules to chosen users or groups. Users can personalize their own portals, that is, they can also add pages or portlets to their portal, remove pages or portlets, rearrange their portal, and so on. However, they can only view modules, pages, and portlets to which you have given them access rights.

Portlets display information relevant to users' business tasks, for example, Mercury Business Availability Center reports, stock market prices, URLs, and so on. Mercury Business Availability Center includes portlets written and supported by Mercury. In addition, My BAC administrators and advanced users at customer sites can write their own portlets. Portlets written by industry-standard portlet providers can be imported into the system, provided they use the JSR168 standard.

My BAC Administrator Workflow

The following workflow explains how to set up My BAC.

1 Create a module.

You create modules that you publish or distribute to users. A module includes pages that contain portlets.

For details, see Chapter 2, "Creating a Module."

2 Publish or distribute the module.

Publish. The user cannot edit or personalize the pages or portlets. Pages and portlets cannot be published separately.

Distribute. The user can edit the pages and portlets. Modules, pages, and portlets can be distributed separately, but the pages and portlets must be part of a module.

For details, see Chapter 3, "Publishing and Distributing Modules."

3 Configure the module.

You can make changes to module configuration, copy and delete modules, and change user access permissions.

For details, see Chapter 4, "Working with Module Configurations."

4 Make the module the default portal for specific users or groups.

You define a default module for all users who have not been given access to a specific module.

For details, see Chapter 5, "Choosing a Default Fallback Module."

5 Remove a module.

You can remove published modules.

For details, see Chapter 6, "Removing Published Modules."

6 Import portlet definitions.

You can import portlet definitions so that the portlets can be included in modules for publication or distribution to users.

For details, see Chapter 7, "Importing Portlet Definitions." For a list of out of the box portlets, see "Default Portlets" in *Using My BAC*.

Important: When adding portlets to a page, if a certain portlet does not appear in the portlet list, verify that the portlet definition has been imported.

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7 Configure portlet definitions.

You can change configurations, such as access rights, for portlets.

For details, see Chapter 8, "Configuring Portlet Definitions."

8 Export portlets.

You can export portlets (as an XML file), for example, for importing into another Mercury Business Availability Center instance. You can also export modules.

For details, see Chapter 9, "Exporting Objects."

9 Import portlets.

You can import portlets, for example, when migrating a version, or moving from a test to a production environment. You can also import modules.

For details, see Chapter 10, "Importing Objects."

User Workflow

You can personalize the pages and portlets that you view in My BAC.

For details, see "Personalizing Your Portal" in *Using My BAC*.

2

Creating a Module

This chapter explains how to create modules that you publish or distribute to users. A module is a collection of pages in a portal that can be viewed by users when they access their My BAC portal.

This chapter describes:	On page:
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Defining the Module

For the complete workflow for setting up the My BAC portal, see "My BAC Administrator Workflow" on page 2.

To create a module:

1 Select **Admin** > **My BAC** > **Manage Modules** > **Create Module** to open the Create Module page.

2 In the Module Name field, enter the name of the module. This name must be unique.

3 In the Description field, enter a brief description.

4 The module is enabled by default, that is, it will be available for adding to users' portals. To disable the module, select **No**.

Note: If a portlet is added to a page, then disabled, the portlet remains on the page.

---

5 Add pages to the module. These are the pages that will contain the portlets.

◆ To add a blank page to the module, click **Add Blank Page**.

The page name changes to New Page. Continue to the next step.

◆ To add an existing page to the module, click **Add a User's Pages**.

In the window that opens, select the user and pages that you want to add to this module.

Select the **Replace pages in module with matching names** check box to overwrite existing pages. Clear the check box to add the selected page.

Click **Add** to add the pages to the module and return to the Create Module page.

6 Enter a name for the page.

◆ To display another page in the module, click **Switch to page** and choose the page from the list.

◆ To delete this page, click **Delete Page**, and confirm the deletion.

◆ To reorder pages, click **Reorder Pages** and in the window that opens, use the arrows to change the order. Click **OK** to return to the Create Module page.

7 Click **Add Portlets** to open the Add Portlets to Page dialog box.

You search for portlets by entering the portlet name or choosing a category. Leave the boxes empty to find all portlets. Enter part of a name to find all portlets that include those characters.

Click **Find Portlets**. Portlets answering the query are displayed.

Select the check boxes of the portlets to be added to the page, and click **Add**. You are returned to the Create Module page. The portlets are displayed one below the other.

◆ To change the order of the portlets, select a portlet and drag it to the correct position.

◆ To set a portlet to open across the whole width of the page, click the **Set portal width** icon. Click the icon again to return the portlet to its former width.

◆ To edit the portlet filters, click the **Edit portlet preferences** icon. For details, see "Editing Portlet Preferences" on page 10.

◆ To delete the portlet, click the **Remove portlet from page** icon.

◆ To copy the portlet, for example, if you wanted to show the same report but for a different time range, click **Copy**. A copy of the portlet is added to the bottom of the section. Click the **Edit portlet preferences** icon to change the report filters.

◆ To move the portlet to another page, choose the page in the Move to Page box, and click **Move**.

8 Configure access to the module.

◆ To enable users to modify the module:

• In the Administrator Access section, in the Give Access to field, select **User** or **Group** from the drop-down list.

- Click the icon to choose the users or groups who can modify the module. In the window that opens, select the users or groups and click **OK** to return to the Create Module page. (To change the order, click **Change Order** and, in the window that opens, use the arrows to change the order of the users or groups.)

  If you have chosen more than one user or group, hold the pointer over the field to view a list of all selected users or groups.

- In the Create Module page, click **Add**. The users or groups are displayed in the section.

  To remove a user or group, click the icon again. In the window that opens, remove users or groups from the list by clicking them. Click **OK** to return to the Create Module page.

  Note: You must choose at least one user or group.

◆ To set the module to be the default module:

- In the Set as Default Module section, in the Add Users field, select **User** or **Group** from the drop-down list.

- Click the icon to choose the users or groups who will see this module when accessing My BAC. In the window that opens, select the users or groups and click **OK** to return to the Create Module page. (To change the order, click **Change Order** and, in the window that opens, use the arrows to change the order of the users or groups.)

- In the Create Module page, click **Add**. The users or groups are displayed in the section.

- Choose whether users will see the module:

    As published content. The module is published to users but they cannot personalize the content.

    As distributed content. The module is distributed to users who can personalize the content.

◆ To enable a user or group to add the module to their portals as pre-configured pages:

  - In the Self-Service Access section, select **Allow users to add this module to their own portals as Pre-configured Pages**. This module will be available for users to choose when personalizing their portals. For details, see "Adding Preconfigured Pages" in *Using My BAC*.

  - In the Self-Service Access section, in the Give Access to field, select **User** or **Group** from the drop-down list.

  - In the Configure Self-Service Access section, next to the drop-down list, select a resource.

  - In the Configure Self-Service Access section, click **Add**.

For details on defining users and groups, see "User and User Group Management" in *Platform Administration*.

9 At the top or bottom of the Create Module page, click **Create**.

My BAC creates the module and displays a confirmation page.

10 Click a link to:

◆ Configure the module you just created. For details, see Chapter 4, "Working with Module Configurations."

◆ Distribute the module. If you do not need to make any changes to the module, you can configure the module for distribution. For details, see Chapter 3, "Publishing and Distributing Modules."

◆ Create another module. For details, see "Defining the Module" on page 5.

◆ Search for other modules to configure. For details, see "Searching for a Module to Configure" on page 19.

The next stage in the procedure is to distribute the module. Continue to Chapter 3, "Publishing and Distributing Modules."

Editing Portlet Preferences

You can edit portlet preferences, for example, you can change filter conditions such as which CIs are displayed in a report.

To edit a portlet's preferences:

In the Create Module page, click the **Edit portlet preferences** icon to open the filter pages. For details on the filters you can apply for each portlet, see "Default Portlets" in *Using My BAC*.

3

Publishing and Distributing Modules

This chapter explains how to publish and distribute modules. If you publish the module to users, they can view the pages but cannot change them. If you distribute a module to users, they can personalize the pages.

This chapter describes:	On page:
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Publishing and Distributing Modules Workflow

The following procedure explains the steps you take to publish or distribute a module. At any step you can return to the previous step by clicking the **Back** button.

1 Choose the distribution method.

For details, see "Choosing the Distribution Method" on page 12.

2 Choose the users.

For details, see "Choosing the Users" on page 13.

3 **Preview the publication or distribution details.**

For details, see "Previewing the Publication or Distribution Details" on page 15.

4 **Verify a successful publication or distribution.**

For details, see "Verifying a Successful Publication or Distribution" on page 16.

Choosing the Distribution Method

This section explains how to choose the distribution method. You can access this page:

➤ At the end of the procedure to create a module. For details, see Chapter 2, "Creating a Module."

➤ At the end of the procedure to configure a module. For details, see Chapter 4, "Working with Module Configurations."

➤ By accessing the page directly (**Admin** > **My BAC** > **Manage Modules** > **Distribute or Publish a Module**).

To choose a distribution method:

1 Display the **Distribute or Publish a Module** page (according to one of the above procedures).

2 If the Module field is empty, enter the module name, either by clicking the icon and selecting the name, or by typing the name in the field.

If the Module field includes a module name, either accept or change the name.

3 Choose the method to use to distribute the module to users:

◆ **Publish entire Module.** Only administrators can view and use this method. An administrator can publish all pages to selected users or groups.

◆ **Distribute entire Module.** Only administrators can view and use this method. An administrator can distribute all pages to selected users or groups.

◆ **Distribute only these pages.** Click the icon to choose which pages of the module can be distributed to users.

◆ **Distribute only these portlets.** Click the icon to choose which portlets can be distributed to users.

- **Place on the first available user-controlled page.** Select this option to distribute the selected portlets to a user's existing home page.

- **Place on a new page, named.** Select this option to distribute the selected portlets on a new page. Type in a name for the new page.

4 Click **Next**.

The next stage in the procedure is to choose the users who can view or change the module, according to which method you chose in step 3 on page 12. Continue to the next section.

Choosing the Users

The next stage in the procedure is to choose the users who can view or change the module. Choose the users and click **Next** to save the details and continue to the next stage of the procedure.

To choose users or groups for a module that is to be published:

1 Users. Click the icon to choose the users to whom the module is to be distributed. In the window that opens, select the users and click **OK** to return to the Publish a Module page. (To change the order, click **Change Order** and, in the window that opens, use the arrows to change the order of the users.)

2 Groups. Click the icon to choose the groups to which the module is to be distributed. All users in the group will be able to view the published module. In the window that opens, select the groups and click **OK** to return to the Publish a Module page. (To change the order, click **Change Order** and, in the window that opens, use the arrows to change the order of the groups.)

3 **Users with the following Published Modules.** Click the icon to choose a module. Only users who already have permissions to view this module will receive the new module. In the window that opens, select the modules and click **OK** to return to the Publish a Module page. (To change the order, click **Change Order** and, in the window that opens, use the arrows to change the order of the modules.)

To choose users or groups for a module that is to be distributed:

1 **Users.** Click the icon to choose the users to whom the module is to be distributed. In the window that opens, select the users and click **OK** to return to the Publish a Module page. (To change the order, click **Change Order** and, in the window that opens, use the arrows to change the order of the users.)

2 **Groups.** Click the icon to choose the groups to which the module is to be distributed. All users in the group will be able to view the published module. In the window that opens, select the groups and click **OK** to return to the Publish a Module page. (To change the order, click **Change Order** and, in the window that opens, use the arrows to change the order of the groups.)

The next stage in the procedure is to preview the publication or distribution details. Continue to the next section.

Previewing the Publication or Distribution Details

The next stage in the procedure is to preview the details before publication or distribution.

To preview details:

1 In the Publish a Module (or Distribute a Module) page, verify that all details are correct:

◆ **Publication content.** Verify that the module or modules being published include the correct pages and portlets.

◆ **Impacted users.** Scroll through the list of users and verify that all users are listed.

If no users will be able to view the published or distributed module, a message is displayed. Return to the previous page (by clicking the **Choose Users** link) and make changes to the list of users.

◆ **E-mail notification.** If you chose to notify users by e-mail, verify that the e-mail is configured and worded correctly.

2 Click **Finish**.

The next stage in the procedure is to verify that the module has been published successfully. Continue to the next section.

Verifying a Successful Publication or Distribution

The next stage of the procedure is to verify that the module has been published successfully, that is, all users can now view or use the module and have received e-mail notification.

To verify a successful publication or distribution:

1 After you click **Finish** in the Publish a Module (or Distribute a Module) page, My BAC displays a window with the results of the publication.

2 If publication or distribution was successful, close the window.

In the Publish a Module (or Distribute a Module) page, you can view publication or distribution status (that is the results of the publication or distribution) or you can publish another module. For details, see "Choosing the Distribution Method" on page 12.

3 If publication or distribution was not successful, a list of users not receiving the module is displayed. Click the re-publish link to republish the module to the list of failed users.

This is the end of the procedure for publishing or distributing a module.

Notes

Note the following for published and distributed modules:

Published Modules

➤ When adding portlets to a page, if a certain portlet does not appear in the portlet list, verify that the portlet definition has been imported. For details, see Chapter 7, "Importing Portlet Definitions."

➤ Modules can be published by My BAC administrators only. Individual pages and portlets cannot be published.

➤ The pages and portlets of a published module cannot be edited or removed by the owner of the portal.

➤ Published modules are tracked by the system.

➤ Published modules can be removed by the My BAC administrator.

➤ A published module is overwritten by an updated version of the same published module.

➤ End users cannot personalize portlets or portal pages of published modules.

Distributed Modules

Distributing is a process of disseminating modules to one or more user portals at one time. Distributing provides a flexible approach to disseminating modules, pages, and portlets. Modules, pages, and portlets can be distributed to a user's portal. Distributed modules, pages, and portlets are not tracked by the system. Once on a user's portal, a My BAC administrator cannot edit or delete a distributed module, page or portlet.

➤ Modules, pages, and portlets can be distributed.

➤ Distributed modules, pages, and portlets can be edited by the end user.

➤ Distributed modules, pages, and portlets are not tracked by the system.

➤ Distributed modules, pages, and portlets cannot be removed by the My BAC administrator.

➤ A distributed module is not overwritten by an updated version of the distributed module. This means if a module is distributed twice to the same user, the user receives two copies of the module.

4

Working with Module Configurations

This chapter explains how to work with existing modules, for example, to add or delete pages and portlets from a module, to set user access rights to modules, and to copy and delete modules.

Searching for a Module to Configure

This section explains how to search for a module.

To search for a module:

1 Select **Admin** > **My BAC** > **Manage Modules** > **Configure Modules** to open the Search for a Module to Configure page.

2 Enter any of the following search criteria (mandatory fields are preceded by a red asterisk):

◆ **Reset Form.** Click this button to clear all the fields and display default criteria.

◆ **Name.** Type all or part of a module's name. Typing part of a name yields all matching results.

◆ **Show only modules that have changed since last publication.** Finds modules changed since they were last published.

◆ **Created By.** The name of the user who created the module. Click the icon to select the user.

◆ **Last Updated From... To.** The date the module was last updated. You can enter a range of dates. Click the icon to select the date and time.

◆ **Last Published From... To.** The date the module was last published. You can enter a range of dates. Click the icon to select the date and time.

◆ **Published to Users.** The names of users who use the published module. Click the icon to select the users.

◆ **Sort By.** To sort results, choose between **Name**, **Last Updated On**, and **Last Published On**.

◆ **Ascending/Descending.** Selects the sort order as ascending or descending. The default is ascending.

◆ **Results Displayed Per Page.** The number of search results to display on every page. The default is 50. This field is mandatory.

3 Click **Search**.

The results are displayed in the Select a Module to Configure section. See the previous step for explanations of the columns. Use the **Prev** and **Next** buttons to display more results.

◆ To refine your search, edit the Search for a Module to Configure section.

◆ To start a new search with new search criteria, click **Reset Form**.

Note: My BAC assigns a fallback module to any user who has not been assigned a module. You can accept the default fallback module or you can select another module to be the fallback module.

To edit the default fallback module, click **Default Fallback Module**. For details, see "Changing the Default Fallback Module Configuration" on page 22.

To select another module to be the default module, click **Configure Default Modules**. For details, see "Changing the Default Fallback Module Configuration" on page 22.

4 In the Select a Module to Configure section, locate and click the module to open the Configure <Module Name> page.

The next stage in the procedure is to edit the module configuration. For details, see the next section.

Changing a Module Configuration

This section explains how to make changes to a module's configuration.

To change a module configuration:

1 Select **Admin** > **My BAC** > **Manage Modules** > **Configure Modules** to open the Configure Modules page.

2 Click **Search** to display a list of modules. For details on searching for a module, see "Searching for a Module to Configure" on page 19.

3 Click the name of the module you want to change to open the Configure <Module Name> page.

4 Make changes to the module as explained in Chapter 2, "Creating a Module."

If the module has been published, you can remove access to the module. For details, see Chapter 6, "Removing Published Modules."

To view which users have access to the module, click **View Module Usage**. For details, see "Viewing Module Usage" on page 23.

To make a copy of the module, click **Copy**. For details, see "Copying a Module" on page 24.

To delete a module, click **Delete**. For details, see "Deleting a Module" on page 25.

5 Click **Done**.

- ◆ To save the changes made to the module, click **Save**. The Configure <Module Name> page stays open.

- ◆ To stop the configuration of the module, click **Cancel**.

- ◆ To save the changes made to the module and load the module in the Distribute a Module page, click **Save and Distribute**. For details on distributing the module, see Chapter 3, "Publishing and Distributing Modules."

Changing the Default Fallback Module Configuration

My BAC assigns a fallback module to any user who has not been assigned a default module. You can edit this configuration.

During module creation, you can assign the module to specific users. For details, see Chapter 2, "Creating a Module."

To change the fallback module configuration:

1 Select **Admin** > **My BAC** > **Manage Modules** > **Configure Modules** to open the Configure Modules page.

2 Click **Search** to display a list of modules and locate the Default Fallback Module link. For details on searching for a module, see "Searching for a Module to Configure" on page 19.

3 Click the **Default Fallback Module** link to open the Configure: Default Fallback Module page.

Note: If the default fallback module has been changed to another module, locate the module with a bolded name: this is the default fallback module.

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4 Make changes to the default fallback module as explained in Chapter 2, "Creating a Module."

5 To save the changes, click **Save**.

To save the changes and open the My BAC portal, click **Done**.

To open the My BAC portal without saving changes, click **Cancel**.

Viewing Module Usage

You can view a list showing the users who currently have access to a specific module, that is, the module is displayed in their portal.

Note: You cannot view a module's usage if the module has not been published (the View Module Usage button is disabled). For details on publishing a module, see Chapter 3, "Publishing and Distributing Modules."

To view a list of users with access to a specific module:

1 Select **Admin** > **My BAC** > **Manage Modules** > **Configure Modules** to open the Configure Modules page.

2 Click **Search** to display a list of modules. For details on searching for a module, see "Searching for a Module to Configure" on page 19.

3 Click the module link to open the Configure <Module Name> page.

 4 Click **View Module Usage** to open the View Module Usage page.

 5 The View Module Usage page lists the users who currently have the module published to their portal. Use the **Prev** and **Next** buttons to display more results.

Copying a Module

To create a new module with similar properties to an existing module, you can copy the existing module.

To copy an existing module:

 1 Select **Admin** > **My BAC** > **Manage Modules** > **Configure Modules** to open the Configure Modules page.

 2 Click **Search** to display a list of modules. For details on searching for a module, see "Searching for a Module to Configure" on page 19.

 3 Click the module link to open the Configure <Module Name> page.

 4 Click **Copy** to open the Copy Module: <Module Name> page.

 5 The name of the module is **Copy of <Module Name>**. Change the name to the new name.

 6 In the Description field, enter a new description for the module.

 7 Make any necessary changes to the module configuration. For details on configuring a module, see "Changing a Module Configuration" on page 21.

 8 Click **Create**. A message informs you that the new module has been created. You can:

 ◆ Return to the Configure <Module Name> page. For details, see "Changing a Module Configuration" on page 21.

 ◆ Distribute the module. For details, see Chapter 3, "Publishing and Distributing Modules."

 ◆ Create another module. For details, see Chapter 2, "Creating a Module."

 ◆ Search for other modules to configure. For details, see "Searching for a Module to Configure" on page 19.

Deleting a Module

You can delete a module if it has not been published. Modules that have been published (the Delete button is disabled) can be removed. For details, see Chapter 6, "Removing Published Modules."

To delete a module:

1 Select **Admin > My BAC > Manage Modules > Configure Modules** to open the Configure Modules page.

2 Click **Search** to display a list of modules. For details on searching for a module, see "Searching for a Module to Configure" on page 19.

3 Click the module link to open the Configure: <Module Name> page.

4 Click **Delete**. To delete the module, answer **OK** to the question that is displayed. To return to the Configure: <Module Name> page without deleting the module, click **Cancel**.

5

Choosing a Default Fallback Module

This chapter explains how to choose a default fallback module for users. You can choose any module to be the default fallback module. Any user who has not been assigned a default module sees the module you define here, when logging in to Mercury Business Availability Center.

To define a new fallback module:

1 Select **Admin** > **My BAC** > **Manage Modules** > **Configure Modules** > **Configure Default Modules** to open the Configure Modules page.

You can also reach this page from the Configure <Module Name> page. For details, see "Changing a Module Configuration" on page 21.

2 Enter the name of the module that is to be the default module, or click the icon to open a list of modules. In the window that opens, select the module.

3 Choose whether the default model is to be maintained by the My BAC administrator (**As Published content**), or whether any user can change the default module (**As Distributed content**).

6

Removing Published Modules

This chapter explains how to remove published modules. You can remove access to a module for specific users.

Note:

➤ You cannot remove access if the module has not been published (the Remove Published Module button is disabled). For details on publishing a module, see Chapter 3, "Publishing and Distributing Modules."

➤ You cannot remove a published module if the module has not been assigned to any users.

You can access this page:

➤ By accessing the page directly (**Admin** > **My BAC** > **Manage Modules** > **Remove Published Module**).

➤ From the Configure <Module Name> page. For details, see "Changing a Module Configuration" on page 21.

To remove access for a module:

1 Select **Admin** > **My BAC** > **Manage Modules** > **Remove Published Module** to open the Configure Modules page.

2 Click **Search** to display a list of modules. For details on searching for a module, see "Searching for a Module to Configure" on page 19.

3 Click the module link to open the Configure <Module Name> page.

4 Click **Remove Published Module** to open the Remove Published Module page.

5 If the module to be removed is not selected in the Module box, select the module by clicking the icon.

6 You can choose to remove the module from all users or from chosen users or groups:

◆ To remove the module from all users, select **Remove publication from all current users**.

◆ To remove the module from chosen users or groups, click the icon to choose the users or groups. In the window that opens, select the users or groups and click **OK** to return to the Remove Published Module page.

7 Click **Continue**. In the next page, review the removal details and click **Remove**.

7

Importing Portlet Definitions

This chapter explains how to import portlet definitions so that the portlets are available for inclusion in a page.

Portlet Types

The first step in the procedure to import a portlet, to make them available to My BAC users' portals, is to choose the type of portlet to be imported. For details on the out of the box portlets, see "Default Portlets" in *Using My BAC*.

You can import Java and WSRP portlets:

➤ **Java Portlets.** Java portlets are portlets written in Java and imported into My BAC. Java portlets consist of a portlet definition file and the Java code.

➤ **WSRP Portlets.** You can import WSRP portlets from a producer Web service or from portals supported by Mercury, and export them to other Mercury products. WSRP portlets consist of a portlet definition file (in XML format) referencing the HTTP location of the WSRP portlet. If you are using WSRP portlets and Mercury Business Availability Center is running on Solaris with an IPlanet Web Server, in the IPlanet obj.conf file under the line NameTrans fn="assign-name" from="/topaz/dashboard/*" name="J2FRedirect", add the line: NameTrans fn="assign-name" from="/dashboard/*" name="J2FRedirect"

Portlet Definitions

Portlet definitions are XML files that define the look and feel of a portlet. Portlet definitions include such information as the type of portlet, user and group access rights to the portlet, and filter definitions.

Importing Portlet Definitions Workflow

The following procedure explains the steps you take to import portlet definitions. At any step you can return to the previous step by clicking the **Back** button.

 1 **Choose the portlet type.**

For details, see "Choosing the Portlet Type" on page 33.

 2 **Select from available portlets.**

For details, see "Selecting from Available Portlets" on page 33.

3 Enter portlet information.

For details, see "Changing Portlet Information" on page 35.

4 Configure access.

For details, see "Configuring Access to the Portlet" on page 36.

5 Confirm a successful import.

For details, see "Confirming a Successful Import" on page 37.

Choosing the Portlet Type

The first stage in the procedure is to choose which portlet type you are importing: Java or WSRP. For definitions of the available portlets, see "Portlet Types" on page 32.

To choose the portlet type:

1 Access the Import Portlet Definition page (**Admin** > **My BAC** > **Manage Portlet Definitions** > **Import Portlet Definition**).

2 The Java portlet is selected by default. Click **Next**, or select **WSRP** and click **Next**.

The next stage in the procedure is to select the specific portlet. Continue to the next section.

Selecting from Available Portlets

The next step in the procedure is to select a portlet. The procedure for selecting a portlet depends on which portlet type you chose in the previous step. Only one portlet can be selected at a time.

Selecting a Java Portlet

For details on the default Java portlets, see "Default Portlets" in *Using My BAC*.

To select a Java portlet:

1 In the Import Portlet Definition (Java) page, select the portlet you want to import.

A tick next to a portlet signifies that it has been imported previously.

2 Click **Next** to make changes to the portlet information (such as name or category), or click **Finish** to import the portlet definition.

> ➤ If you clicked **Next**, continue to the procedure for entering portlet information. For details, see "Changing Portlet Information" on page 35.

> ➤ If you clicked **Finish**, you can choose to perform other actions, such as importing another definition. For details, see "Confirming a Successful Import" on page 37.

Selecting a WSRP Portlet

You can select portlets that reside at a remote location.

Note: When no portlets are available, all portlets are selected. The Next and Finish buttons are disabled. Click **Back** to return to the previous page. Click **Cancel** to stop the import of the WSRP portlet.

To select a WSRP portlet:

1 In the Import Portlet Definition (WSRP) page, enter the URL of a Web service which provides portlets via the WSRP protocol.

2 Click **Next**.

My BAC contacts the Web service to determine which portlets are available and displays them in the next page.

3 In the next page, select the portlet you want to import.

4 Click **Next** to make changes to the portlet information (such as name or category), or click **Finish** to import the portlet definition.

> ➤ If you clicked **Next**, continue to the procedure for entering portlet information. For details, see "Changing Portlet Information" on page 35.

➤ If you clicked **Finish**, you can choose to perform other actions, such as importing another definition. For details, see "Confirming a Successful Import" on page 37.

Changing Portlet Information

The next step in the procedure is to make changes to portlet information such as name or category. This step is optional.

To change portlet information:

1 In the Import Portlet Definition page, make changes as follows:

➤ **Name.** Enter a new name for the portlet. The name of the portlet must be unique. The maximum length of the name is 80 characters. This field is mandatory.

➤ **Category.** Select one or more categories that characterize the portlet. A category helps users find the portlets they need. Click the **Manage Categories** button to add or delete portlet categories. For details, see "Managing Portlet Categories" on page 38.

➤ **Description.** To aid users, enter a description of the portlet. The maximum length of the description is 1800 characters.

➤ **Default Width.** Choose whether the default width of the portlet should be **Narrow** or **Wide**. The default is **Narrow**.

➤ **Enabled.** Choose **Yes** (the default) to enable the portlet to be added to a page. (You would probably choose **No** in a testing environment.)

2 Click **Next** to make changes to user access, or click **Finish** to import the portlet definition.

➤ If you clicked **Next**, continue to the procedure for configuring access. For details, see "Configuring Access to the Portlet" on page 36.

If a portlet definition with the name already exists, My BAC displays a message. Return to the Import Portlet Definition page and change the name.

➤ If you clicked **Finish**, you can choose to perform other actions, such as importing another definition. For details, see "Confirming a Successful Import" on page 37.

Configuring Access to the Portlet

The next step in the procedure is to configure access rights to the portlet for users, groups, and administrators.

Note: Access to a portlet definition is given, by default, to all users and all administrators. If you assign access rights to specific users or groups, or to specific administrators, My BAC removes the All Users or All Portlet Definition Administrators security type from the list and replaces the type with the user, group, or administrator you chose.

To configure access to the portlet:

1 In the Configure Access section of the next page, decide whether users need a special license to access the portlet. In the **Require users to have one of these privileges** field, enter the name of the license or click the icon to choose a license. In the window that opens, select the license. Click **OK** to return to the Configure Access section.

2 Choose the users and groups who will have access rights to the portlet:

   a In the Give Access to field, select either **User** or **Group**.

   b Enter the name of the user or group, or click the icon to choose the users or groups.

   c In the window that opens, select the users or groups. (To change the order, click **Change Order** and, in the window that opens, use the arrows to change the order of the users or groups.)

   d Click **OK** to return to the Configure Access section.

   e Click **Add** to add the users and groups to the list.

3 Choose the users and groups who will have administrative rights on the portlets.

   a In the Give Access to field, select either **User** or **Group**.

   b Enter the name of the user or group, or click the icon to choose the users or groups.

    c In the window that opens, select the users or groups. (To change the order, click **Change Order** and, in the window that opens, use the arrows to change the order of the users or groups.)

    d Click **OK** to return to the Configure Access section.

    e Click **Add** to add the users and groups to the list.

4 **Make Portlet available to WSRP Consumers.** If you are importing a Java portlet, select this check box to make it available for Web service clients.

5 Click **Finish**.

The last stage of the procedure is to confirm that the portlet has been successfully imported. Continue to the next section.

Confirming a Successful Import

The last stage of the procedure is to confirm that the portlet has been successfully imported. My BAC displays a message confirming a successful import.

Click a link to:

➤ Configure the newly created portlet definition. For details, see "Configuring a Newly-Imported Portlet Definition" on page 38.

➤ Import another portlet definition. For details, see "Choosing the Portlet Type" on page 33.

➤ Search for other portlet definitions to configure. For details, see "Searching for a Portlet Definition to Configure" on page 42.

Note: Create a new portlet definition is not available in the current version.

Configuring a Newly-Imported Portlet Definition

At the end of the procedure for importing a portlet definition, if you click the Configure <Portal Definition>, My BAC displays both the Import Portlet Definition and Configure Access pages.

To configure a newly-imported portlet definition:

1 Make any changes to the fields as described in:

◆ "Changing Portlet Information" on page 35

◆ "Configuring Access to the Portlet" on page 36

2 Save the changes.

◆ To save the changes and remain on the page, click **Save**.

◆ To save the changes and open the My BAC portal, click **Done**.

◆ To open the My BAC portal without saving changes, click **Cancel**.

Managing Portlet Categories

During the procedures for importing or configuring a portlet definition, you can select portlet categories that enable users to more easily find a specific portlet to add to their portal. My BAC categories include the Mercury Business Availability Center applications such as Service Level Management, Dashboard, and End User Management. You can add categories to the list.

To add a category:

1 In the Import Portlet Definitions or Configure Portlet Definitions page, click the **Manage Categories** button to open the Manage Categories window.

Existing categories are listed.

2 Enter the name of a new category in the New Category field and click **Add**.

3 Click **Done** to return to the Import Portlet Definition or Configure Portlet Definitions page. Click **Cancel** to return to the page without saving the changes.

To remove a category:

1 Locate the category you want to delete and click the delete button.

You cannot delete a default category.

2 Click **Done** to return to the Import Portlet Definition or Configure Portlet Definitions page. Click **Cancel** to return to the page without saving the changes.

Notes and Limitations

My BAC provides support for JSR 168 and WSRP standards-compliant portlets. This support is based on the Apache Reference implementations of two specifications: Pluto and WSRP4J. However, the specifications may not be complete in all areas or may be open to interpretation. Mercury has made design decisions to cover these areas.

Mercury is committed to provide support for customers implementing these types of portlets, including debugging and diagnosing problems related to My BAC. Mercury will not extend that support to cover the debugging of custom portlet code or configuration files.

To facilitate diagnosis, customers reporting problems to Mercury Customer Support are required to provide a simple, reproducible case that demonstrates the error in the My BAC portal.

8

Configuring Portlet Definitions

This chapter explains how to edit a portlet definition. You can also copy and delete portlet definitions.

Configuring Portlet Definitions Workflow

The following procedure explains the steps you take to edit, copy, or delete portlet definitions.

1 **Access the Configuring Portlet Definition page.**

2 **Search for the portlet definition you want to edit.**

For details, see "Searching for a Portlet Definition to Configure" on page 42.

3 **Display the Configure Portlet Definition page.**

For details, see "Choosing the Portlet Definition" on page 43.

4 **Edit the portlet definition.**

For details, see "Editing a Portlet Definition" on page 43.

5 **Copy a portlet definition.**

This step is optional. For details, see "Copying a Portlet Definition" on page 44.

6 **Delete a portlet definition.**

This step is optional. For details, see "Deleting a Portlet Definition" on page 45.

Searching for a Portlet Definition to Configure

The first stage in the procedure is to search for the portlet definition you want to edit, copy, or delete.

To search for a portlet definition:

1 Select **Admin** > **My BAC** > **Manage Portlet Definitions** > **Configure Portlet Definition**.

2 Click the **Configure Portlet Definition** link to open the Search for a Portlet Definition to Configure page.

3 Enter any of the following search criteria:

 ◆ **Reset Form.** Click this button to clear all the fields and display default criteria.

 ◆ **Name.** Type all or part of a portlet definition's name. Typing part of a name yields all matching results.

 ◆ **Category.** Select a category to find only those portlet definitions that belong to that category.

 ◆ **Created By.** The name of the user who created the portlet definition. Click the icon to select the user.

 ◆ **Type.** Choose to view either the Java or WSRP portlets.

 ◆ **Enabled.** Choose **Yes** (the default) to enable the portlet to be added to a page. (You would probably choose **No** in a testing environment.)

 ◆ **Sort By.** To sort results, choose between **Name**, **Type**, **Category**, and **Enabled**.

   ◆ **Ascending/Descending.** Select the sort order for results as ascending or descending. The default is ascending.

   ◆ **Results Displayed Per Page.** Enter the number of search results to display on every page. The default is 50. This field is mandatory.

4 Click **Search**.

The next stage in the procedure is to choose the portlet definition you want to edit, copy, or delete. Continue to the next section.

Choosing the Portlet Definition

The next stage in the procedure is to choose the portlet definition you want to edit, copy, or delete.

To choose the portlet definition:

1 My BAC displays a list of portlet definitions answering the search criteria.

   ◆ Click a column title to sort by that column. An arrow indicates whether the search is ascending or descending.

   ◆ Use the **Prev** and **Next** buttons to display more results.

   ◆ Enter new search criteria to search within these results.

   ◆ **Reset Form.** Click this button to clear all the fields and display default criteria.

2 Click the portlet definition link to open the portlet definition details page.

The next stage in the procedure is to edit, copy, or delete the portlet definition. Continue to the next section.

Editing a Portlet Definition

The next stage in the procedure is to edit the portlet definition.

To edit a portlet definition:

1 Make any changes to the fields as described in:

   ◆ "Changing Portlet Information" on page 35

◆ "Configuring Access to the Portlet" on page 36

2 Save the changes.

    ◆ To save the changes and remain on the page, click **Save**.

    ◆ To save the changes and open the My BAC portal, click **Done**.

    ◆ To open the My BAC portal without saving changes, click **Cancel**.

Copying a Portlet Definition

To create a new portlet definition with similar properties to an existing portlet definition, you can copy the existing portlet definition.

To copy an existing portlet definition:

1 Select **Admin** > **My BAC** > **Manage Portlet Definitions** > **Configure Portlet Definition** to open the Configure Portlet Definition page.

2 Click **Search** to display a list of portlet definitions. For details on searching for a portlet definition, see "Searching for a Portlet Definition to Configure" on page 42.

3 Click the portlet definition link to open the portlet definition details page.

4 Click **Copy** to open the Copy Portlet Definition page.

5 The name of the portlet definition is **Copy of <Portlet Definition>**. Change the name to a new, unique name.

6 In the Description field, enter a new description for the portlet definition.

7 Make any necessary changes to the portlet definition as described in:

    ◆ "Changing Portlet Information" on page 35

    ◆ "Configuring Access to the Portlet" on page 36

8 Click **Create**. A message informs you that the portlet definition has been created.

9 Save the changes.

 ◆ To save the changes and remain on the page, click **Save**.

 ◆ To save the changes and open the My BAC portal, click **Done**.

 ◆ To open the My BAC portal without saving changes, click **Cancel**.

Deleting a Portlet Definition

You can delete a portlet definition.

To delete a portlet definition:

1 Select **Admin > My BAC > Manage Portlet Definitions > Configure Portlet Definition** to open the Configure Portlet Definition page.

2 Click **Search** to display a list of portlet definitions. For details on searching for a portlet definition, see "Searching for a Portlet Definition to Configure" on page 42.

3 Click the portlet definition link to open the portlet definition details page.

4 Click **Delete**. To delete the portlet definition, answer **OK** to the question that is displayed. To return to the Configure: <Portlet Definition> page without deleting the portlet definition, click **Cancel**.

9

Exporting Objects

This chapter explains how to export portlet definitions and modules. You save the resulting XML file and import it into another Mercury Business Availability Center instance. You would probably export a portlet definition or module when upgrading the Mercury Business Availability Center version, or when moving data from a test to a production environment. For details on importing portlet definitions or modules, see Chapter 10, "Importing Objects."

You can export one or more portlets and one or more modules in one file, or you can export each portlet or module in its own file.

To export a portlet and/or module:

1 Select **Admin** > **My BAC** > **Manage Portlet Definitions** > **Export Objects** to open the Export My BAC Objects page.

2 In the Export Portlet Definitions box, type in the name of the portlet definition, or click the icon to choose the portlet to be exported.

3 In the window that opens, select the portlets to be exported.

If you select several portlets, they are exported together in one file.

4 Click **OK** to return to the Export My BAC Objects page.

5 In the Export Modules box, type in the name of the module, or click the icon to choose the module to be exported.

6 In the window that opens, select the modules to be exported.

If you select several modules, they are exported together in one file.

7 Click **OK** to return to the Export My BAC Objects page.

8 Click **Export**.

9 In the File Download dialog box:

◆ Click **Open** to display the XML file in the Web browser (not recommended).

◆ Click **Save** to open the Save As dialog box. Navigate to the folder in which you want to save the file, enter a name for the file or accept the default name, and click **Save**. The selected portlet definitions and modules are exported to an ***.xml** file in the location you chose.

◆ Click **Cancel** to return to the Export My BAC Objects page without saving the file.

10

Importing Objects

This chapter explains how to import portlet definitions and modules. You would probably import a portlet definition or module when upgrading the Mercury Business Availability Center version, or when moving data from a test to a production environment. For details on exporting portlet definitions or modules, see Chapter 9, "Exporting Objects."

To import a portlet definition and/or a module:

1 Select **Admin** > **My BAC** > **Manage Portlet Definitions** > **Import Objects** to open the Import My BAC Objects page.

2 In the Import from File box, click **Browse**. Navigate to the folder where the XML file is located, select the file, and click **Open** to return to the Import My BAC Objects page.

3 To replace a portlet definition or a module with the data in the XML file, select the relevant check box.

If the check boxes are cleared, My BAC skips any portlet definitions or modules in the file, where their ID (for example, <uuid>) is the same as in My BAC.

4 Click **Import**.

My BAC displays a window with the import status for the portlet definitions and modules in the XML file.

11

Upgrading My BAC

If you are upgrading Mercury Business Availability Center to version 6.5, you must perform the following procedures to provide support for SOA and CMDB portlets.

This chapter describes:	On page:
Run a Command in the JMX Console	51
Update Published Modules	52
Update Distributed Modules	53

Run a Command in the JMX Console

The first stage in the procedure to update My BAC is to run a JMX command that updates the definitions in the default module XML files.

To run a command in the JMX console:

 1 Login to Mercury Business Availability Center, select **Admin** > **My BAC**. In a separate browser window, enter the following::

> http://<server_name>:8080/jmx-
> console/HtmlAdaptor?action=inspectMBean&name=Topaz%3Aservice%3
> DPortal+Framework+manag

where <server_name> is the name of the machine on which the Centers Server is installed.

2 In the JMX MBEAN View page, locate the **reloadCustomerDefaultObjects** operation.

3 Enter a value for the customer ID (CustomerID) in the parameter field. For Mercury Business Availability Center, enter **1**. For Mercury Managed Services, enter the value for the customer.

4 Click **Invoke**.

The message Customer default objects reloaded successfully is displayed, signifying that the default modules were updated to version 6.5.

Update Published Modules

If the default modules have been published in the previous version of Mercury Business Availability Center, you must remove and republish the modules.

To remove and republish existing modules:

1 Perform the procedure in "Removing Published Modules" in *My BAC Administration* for all default modules.

Important: My BAC must include at least two modules for you to be able to remove a module. If only one default module exists, you must make a copy of it. Then you can remove and republish the original.

---

2 Perform the procedure for publishing modules in "Publishing and Distributing Modules Workflow" in *My BAC Administration*, to publish all default modules.

3 Notify users that the default modules have been republished.

Note: The e-mail function in My BAC has not yet been implemented.

Update Distributed Modules

If the default modules have been distributed in the previous version of Mercury Business Availability Center, you must redistribute the modules.

To redistribute existing modules:

1 Perform the procedure for distributing modules in "Choosing the Distribution Method" in *My BAC Administration*, for all default modules.

At the end of the procedure, the new pages are added to the default module, which now includes five pages (Dashboard, Service Level Management, End User Management, SOA, and CMDB).

2 Notify your users that you have redistributed the default module.

If users have personalized the existing default module, the updated module includes both the personalized pages and the new pages.

For example, if a user personalized the Dashboard page, the module now includes two Dashboard pages—the previous, personalized Dashboard page and an updated Dashboard page. In this case the user must access My BAC and delete the new page (in the My BAC application, click **Personalize** to display the Personalize My BAC page, switch to the page to be deleted and click the **Delete Page** button).

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