

This document is aimed at training JICS Portal Users. In this document we cover general site navigation and the creation of personal My Pages. This document explains key terms that make the portal easier to understand.

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Key Terms

Portlet Template

Portlet Template is the term used to refer to a portlet that is not yet assigned to a context or page. Portlet templates do not have a location within the site. When customizing a page you select portlet templates to place on a page. Portlet templates have no content. They are just an application. Once assigned to a page they are called portlets and have data specific to a user, context or page.

Portlet

Once assigned to a page a portlet template becomes a portlet. A portlet is context and/or page specific and has data that ties it to a user, context or page.

Shortcuts

Shortcuts are just that, they are views of a portlet that are pulling data from a different context or page. Shortcuts allow users to put portlets on their My Pages context that point to an instance of a portlet in some other context. For example, a faculty member may want easy access to their BIO 101 forums portlet so they would place a shortcut on their My Page that refers to their BIO 101 forums portlet. Shortcuts do not allow for any permission management. Shortcuts use only the permissions set in the portlet. The breadcrumb path on the top of the portlets is used to show the originating context of the actual portlet.

Breadcrumbs

The Portal navigation uses a *location breadcrumb trail*. This is a textual representation of the user's location within the site's structure, e.g. [Home](#) > [Courses](#) > [Math Department](#) > **Math 300**. This representation of information allows user to link to locations in the Portal along a continuum of sequential order. The Breadcrumbs are located in a bar directly beneath the tabs, and above the page title.

Preferences

Many portlets have user level configurations that allow the user to set the portlet to behave in a manner to their liking.

Preference Examples: Sort list alphabetically; Zip code for weather portlet = 00555; Show edit tools by default; etc.

Preferences are set by clicking the wrench icon in the top right of the portlet, clicking the Preferences tab and filling out the form.

Customize this Page

On the same line as the page title but further to the right is a link to "Customize This Page". This leads to the Page Admin. This link is visible only to users with page admin permissions. The Customize this Page link

only appears on the default page view; it does not appear when you are in a full screen portlet view.

Page

A “Page” is the display of any set of Portlets within the Portal.

Page Title

Every page has a page title, which is located at the top of the content area of the page and near the top of the Sidebar. The page title consists of the context name plus the page name.

Content Area

The Content Area is the main area of the page where portlets are located. The page Content Area is located beneath the breadcrumb bar and to the right of the Sidebar Navigation area. The content area utilizes a column layout that can be customized by the user in the page admin tool for a 1, 2, or 3-column layout.

Sidebar Navigation Area (the “Sidebar”)

The sidebar contains links to portlets, pages, sub-contexts, and external links. The sidebar is broken down into different sections, each of which contains similar types of navigation.

Personalized “Welcome Back” Area

Just below the masthead is a blue bar. If the user is not logged in, this bar contains the login fields. After the user has logged in, this bar contains a personalized welcome back message: “Welcome back <First name> <Last name>”. Next to this is a link to “Personal Info” and “Logout”.

Understanding Site Navigation

The Portal Level navigation includes: Tab navigation, the Sidebar navigation area, Breadcrumb navigation, Portlet Icon navigation, and Page Footer navigation. Also included in this documentation are specifications concerning the Site-Map, Page Titles, and the Masthead.

Tabs

My Pages	Courses	Campus Life	Employee Info	Admissions	Alumni Info	Finances
You are here: Home > Campus Life > Clubs > Gaming Clubs > Chess Club > Main Page						

The most basic information structure of the site uses tab navigation. The tab is a visual metaphor for a top-level context or section of the portal.

Each tab section has a “main page,” and may also have any number of additional pages and /or sub-contexts within it. Clicking on a tab leads to the default page of that tab section if you have access to it.

The Portal will be shipped with a default set of tabs, and a default set of contexts and pages within each tab.

A member of the University Admin security group is allowed to create new tabs, rename tabs, move and delete tabs, with the exception of the three key tabs that are considered to be fundamentally important to the Portal structure (the Academics tab, the Campus Life tab and the My Pages tab), which cannot be deleted. *Note: The My Pages tab is the only tab that does not appear in the Site Manager for any level of editing.* There is not a technical limit to the number of tabs that can be added, however there is a practical limit of about 8.

Tab permissions are dynamically based on page permissions. If a member of a role does not have access to any pages within a tab, then the tab will not be displayed.

Because portlet content is page-specific, portlets are therefore understood to have a “normal” location within the site map. If a portlet is placed on a page outside its normal context, it is referred to as a portlet shortcut. (For example: a “Math 101 Readings” portlet placed on the user’s personalized home page (in the My Pages section) would be a portlet shortcut.) The breadcrumb path on the top of the portlet is used to show the originating context or the portlet shortcut.

Portlet templates do not have a specific location – portlets can be added to pages in any context. However, the Site Admin can restrict portlet templates from certain tabs to limit the areas in which they can be used. For instance, a staff payroll type of portlet would likely be restricted only to the Employee Info tab. Tab-based portlet template restrictions do not preclude adding shortcuts to portlets of that template (i.e. if a user has access to the Payroll portlet in the Employee Info tab, he can still add a

shortcut to it on his Home page, even though new instances of that template cannot be created in the My Pages context).

Breadcrumbs



Just below the tab navigation is the site “location” bar, which contains the Location Breadcrumb Trail. This is useful for two reasons: first, it provides orientation for the user, allowing him to see where he is located in the site map; and second, it is used for navigating “back” or “up levels” in the hierarchical site structure. The breadcrumb path reflects the location within the portal site map; it **does not** reflect the actual path the user took to arrive at that location.

The breadcrumb format is defined as follows:

You Are Here: Root Context Name > Tab Context > Context Name > Context Name > ...etc....

For example:

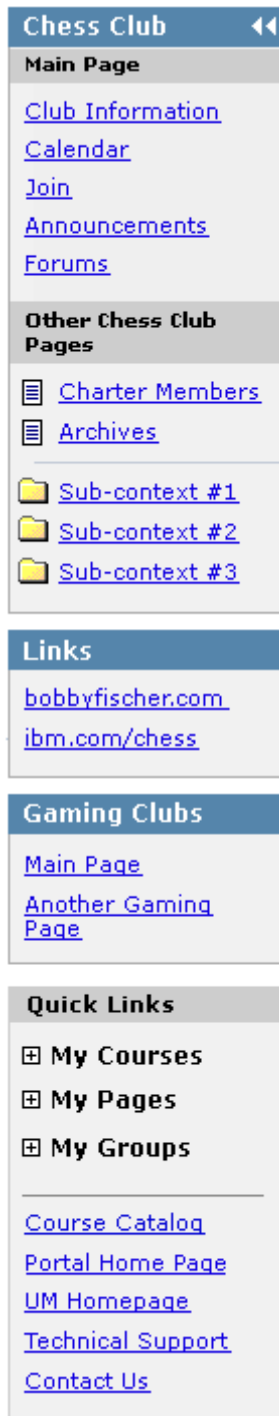
You are here: University of Mary Portal > Courses >

You are here: University of Mary Portal > Courses > Science Dept > Biology 101 >

All the “breadcrumbs” in the path are links.

The site map architecture reflects a hierarchy tree that is made up of both contexts and pages. As there may be contexts within contexts within contexts etc. the breadcrumb path might get very long. The portlet name is NOT included in the breadcrumb trail; the breadcrumb trail ends at the context name.

Sidebar Navigation



In a general sense, the sidebar should be thought of as local navigation within a context. However, because the sidebar also contains different types of links, it is divided into distinct navigation areas that are visually differentiated from each other.

The sidebar is broken down into the following 4 menu boxes:

1. Context Specific Links – this first navigation area in the sidebar contains links that are specific to the context. This area has a header bar that contains the Context Name. The context name is a link to the main page of that context. The context specific links section is made up of a section for links to the portlets on the page, and a section for other links in the context.

Page Portlets Menu – In the first area there is a sub-header, which displays the page name. The page name is a link to the page. Under this sub-header are links to each of the portlets on that page. This is useful for quickly navigating between the full-size portlet screens.

Other Context Pages – The second area is broken down into 2 sub-sections, which are visually separated by a horizontal rule.

The first sub-section is a list of links to other pages in the context. If the user has context admin permissions, this list will be followed by a link to “Add a Page”. This links to the Page Admin screen.

The second subsection is a list of links to the sub-contexts (a.k.a. “Sub-Sections”). These are visually differentiated from page links by using a “folder” type icon next to the link. The sub-context links go to the main pages of the sub-contexts. For some contexts the “sub-context” list of links will be very long. For example, in the Math Department context, the sub-contexts are the Math courses... probably a very long list. For this reason the Context Admin portlet provides the option of **not displaying** the sub-context menu in the sidebar. For these cases, there is a “Sub-Contexts” (coming in v6.4) portlet which simply contains a list of links to the Sub-Contexts, but which can be placed on any page like any other portlet. The Portal will be shipped with these default settings for certain page types. For example, all Department pages will be set up to display the Sub-Contexts portlet on the page, while not displaying the sub-contexts links in the sidebar.

2. The Links Menu – This box (titled “Links”) contains custom links, which are defined by an admin in the Page Admin portlet. These are only for the current page being viewed. They may link to any URL, whether outside or within the portal. If no custom links have been defined in the Page Admin portlet, then this box will not display.

3. The “Parent” Menu – This box contains links to pages in the parent context, including the Main Page. This section is under the heading “< Context Name>”. The “Parent Context” header is a link to the main page of the parent context. If you are on a tab-level page, then the parent context is the root context. In this case there is no parent menu shown.

4. Quick Links Menu – The quick-links section of the sidebar is for navigation on a global level and contains shortcuts to some of the more personalized content areas of the portal. This section of the sidebar will be visible and consistent (i.e. the same) on all pages of the portal. The Quick Links section is broken down into 2 sub-sections, separated by a line or a horizontal rule.

Personal Links - The first section in Quick Links contains links to My Courses, My Pages, and My Groups. These links are contained within expanding/ collapsible menus, which are opened & closed by clicking on the menu name or clicking the toggling “+/-“ icon. The My Courses menu contains links to the user’s current courses (which are pages in the course section). The My Pages menu contains links to, all of the user’s custom defined “Home Pages” *including* the main user customized home page. All these pages are located in the My Pages section. The My Groups menu links to any campus groups in which the user is a member. These Campus Groups pages exist within the Campus Life tab. If a user is not enrolled in any courses, has no personal pages, and/or is not a member of any campus groups, then these menus will not appear in the sidebar.

University Defined Links - The second navigation area within Quick Links is a list of links which may be defined by a University level admin in the Site Admin area. As the Quick Links section of the sidebar is visible on all pages in the portal, these should be general links that the university wants to “push.” For example, the University may wish to have the following links displayed in this area: 1.) a link to the University’s public website, 2.) a Tech Support Link, and 3.) a Contact Us link.

Sidebar Screen Objects

Context Navigation Box – This is a box element that contains navigation to other pages within the current context.

Context Header Bar – A header bar that contains the Context name.

Page Header Bar – A sub-header bar that contains the page name.

Page Portlet links – A list of links to the Portlet instances that are on the page.

“Other <Context> Pages” Header bar – A sub-header bar which contains the text “Other <context name> Pages.”

Other Context Page Links – A list of links to other pages in the same context.

Create a New Page link – A link to the Create a New Page screen in the Page Admin portlet. This link is only available to admins in that context.

Sub-context Links – A list of links to the main pages of sub-contexts.

‘Links’ Box

Customized Links – This is a list of links that can be added to the sidebar by the page “owner” or admin. These may be links to pages either within the portal or to other URLs.

“Parent Context” Navigation Box – This is a box element that contains navigation to pages within the parent context.

Parent Context Header – A header bar that contains the name of the parent context. This is a link to the main page of the parent context.

Parent Context Links – A list of links to all pages within the parent context.

Quick-Links Box – This is a box that contains navigation to pages that are likely to be accessed more frequently by the user: thus the name “Quick Links”. This box also contains links that are customized by a University admin, and which will appear on all portal pages for all users.

My Courses Menu – This is a dynamically expandable menu that contains links to the user’s current course main pages. If the user is neither enrolled in, nor teaching any courses, this menu will not be displayed.

My Pages Menu – This is a dynamically expandable menu that contains links to the user’s custom created pages, which are within the My Pages tab. If the user does not have any custom created pages, this menu will not be displayed.

My Groups Menu - This is a dynamically expandable menu that contains links to the all the campus groups in which the user is currently a member. If the user is not a member of any groups, this menu will not be displayed.

Site-wide Quick Links – This is a list of links that is customized by a University level admin in the Portal Admin portlet. These links may link to any URL either within or outside the portal. This list of links will appear on all portal pages, for all users, so they should be links of relatively high importance.

Portlet Icon Navigation



The portlet header contains three objects. Clicking each performs a different task.

Portlet name – In this example the name of the portlet is ‘Welcome’. Clicking this always brings the user back to the main screen’s maximized view of the portlet.

Wrench icon – Each portlet has a wrench icon. This icon links to the portlets ‘Customize this portlet’ screen. On this screen the user can adjust personal preferences. If the user has the appropriate permissions they may also adjust the portlet settings and security.

Help icon – If a portlet has screen level help you will see a Question mark icon. Clicking this icon will open a help blurb within the portlet.

Page Titles

Chess Club - Main Page



Each page in the site has a page title that is displayed at the top of the content area above the portlets. This is the main page header. The page title is based on a logical naming convention, which combines the context name with the “page name”.

Ex: **Chess Club – Main Page** i.e., “Context Name” – “Page Name”

When any portlet is displayed in its “full-size” view, the “page name” portion of the page title becomes a link back to that page’s default view.

For example, when you are on the Forums main screen on the Chess Club main page, the page title is “Chess Club – Main Page”, where “Main Page” is a link back to the Chess Club main page.

General Screen Objects

The screenshot displays the Jenzabar University website interface with various navigation elements labeled as follows:

- Masthead:** The top header area containing the Jenzabar University logo and the text "AMERICA'S LEADERSHIP UNIVERSITY".
- Welcome Back Bar:** A bar below the masthead displaying "Welcome back Administrator Administrator (Personal Info | Logout)".
- Tabs:** A row of navigation tabs including Athletics, Employee Info, Admissions, Welcome, Academics, Campus Life, Alumni, and Finances.
- Breadcrumbs:** A path of links showing the current location: "You are here: Portal > Academics > Art History - AH > Intro to Art History - ART101 > Art History - Portraits >".
- Portlet links:** A list of links on the left side, including "Art History - Portraits", "Gradebook", and "Other Art History - Portraits Pages".
- Other Pages links:** A list of links on the left side, including "Attendance", "Collaboration", "Course Information", "Coursework", "Hans Holbein", "Home", "Syllabus", "Warhol Era", and "Add a Page".
- Sub-Context links:** A list of links on the left side, including "Art Sub Groups".
- Parent Context links:** A list of links on the left side, including "Intro to Art History - ART101" and "Default Page".
- Quick links:** A list of links on the left side, including "My Groups", "Go Pats!", and "Our Corp Site".
- Global Site Links:** A list of links at the bottom of the page, including "Privacy Policy", "About Us", "Contact Us", and "Campus Directory".
- Footer:** The bottom section of the page containing the copyright notice: "© 2002-2004 Jenzabar, Inc. All rights reserved".
- Customize this Page Link:** A link located in the top right corner of the page.
- Context Manager Link:** A link located in the top right corner of the page.
- Site Manager Link:** A link located in the top right corner of the page.

The main content area displays the "Art History - Portraits - Gradebook" page, which includes a "Grade Breakdown" table and an "Options" section.

Grade Breakdown	
Attendance	15.0 %
Coursework	85.0 %
Total	100.00%

[Edit this Breakdown](#)

Options

- [Configure Attendance & Custom Items](#)
- [View Coursework Breakdown](#)
- [Set Letter Grade Values](#)
- [Change Grade Weighting and Organization](#)

Items without Weights

All your coursework assignments are weighted

Creating and Managing Pages

It will be helpful to define what exactly is meant by the term “page” as it is used in this documentation. Generally speaking, a page is **any grouping of portlets** within the site architecture. All pages live in contexts or “sections” of the site. You have control of your My Pages context.

Strictly speaking a portlet, even in its full-size view is not a page. This is because a portlet is thought of as an element existing on a page, while not actually being a page itself. When a portlet is displayed in full-size, the page title displays the name of the page that the portlet exists on. The page title DOES NOT contain the portlet name, as this is contained in the portlet header.

To create additional My Pages:

- 1) Navigate to your My Pages tab
- 2) Click the ‘Add a Page’ link in the navigation column on the right hand of the portal.
- 3) Fill out the following form and click the ‘Create’ button

Create a new page

Create a new page

Name can contain letters, digits, spaces, single quotes, brackets and signs -, ! and .. Each open bracket should have a corresponding close bracket.

Name

To edit a Page Name:

- 1) Click the 'Customize this Page' link
- 2) Modify the name in the text box to the right of the Name field
- 3) Click the 'Save' button

To delete a My Page's Page:

- 1) Click the 'Customize this Page' link
- 2) Click the 'Delete the page' button

Customize page My Forums Page

Properties Content Layout Security

Page Info

Page Name: My Forums Page

☐ Make this page default.

Save Delete the page

Custom Links

Custom links are optional links that display in the sidebar when the page is displayed.

Current links: There are no items to display.

Add a link: URL: http://

Label:

Description:

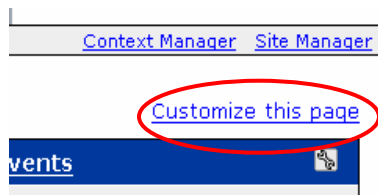
Add Cancel

Exit

- 3) Confirm that you do in fact want to delete the page

Note: Deleting a Page deletes, all content on that page including all Portlets on it. This is not reversible. Perform this task with caution.

Creating and Managing Portlets on a Page

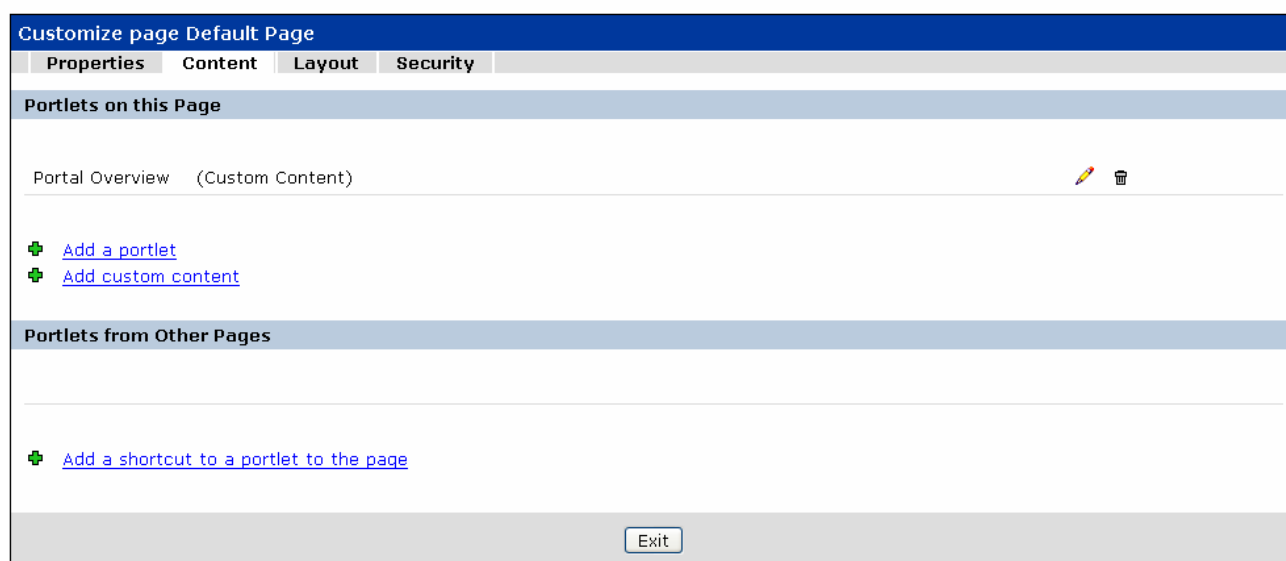


To access the Customize this Page screen:

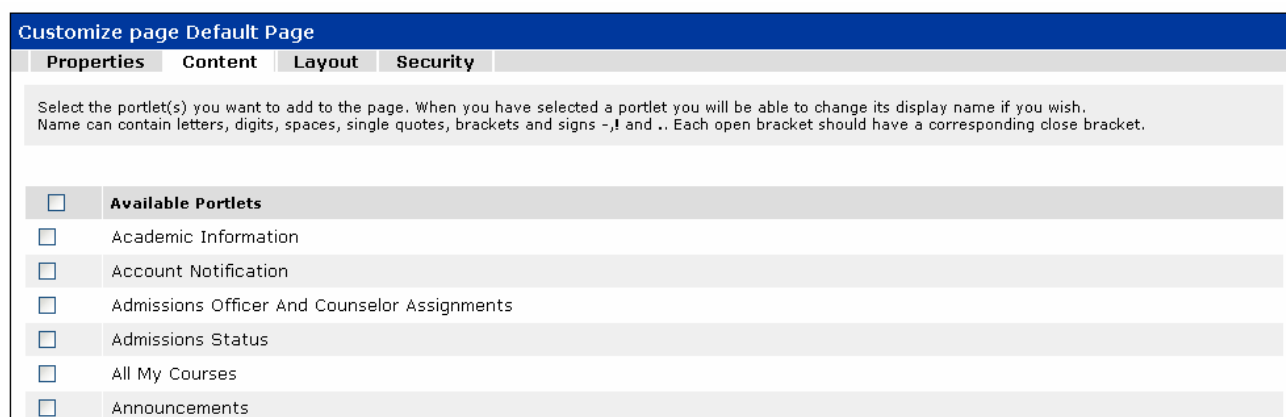
- 1) Navigate to the Page you wish to modify
- 2) Click the 'Customize this page' link in the upper right hand of the portal
- 3) Click the 'Content' tab

To add Portlets to a page:

- 1) Click the 'Add a portlet' link



- 2) Select the Portlet Templates you would like added to the page by checking the box to the left of each
- 3) You have the option on this screen to rename any select portlet templates
- 4) Click the 'Add Portlets to page' link



<input type="checkbox"/>	Task Manager
<input type="checkbox"/>	TE Faculty
<input type="checkbox"/>	TE Student
<input type="checkbox"/>	Timecard
<input type="checkbox"/>	Travel Assistant
<input type="checkbox"/>	View Activity
<input type="checkbox"/>	View Candidate

To edit a Portlet on a page:

- 1) On the main Content screen lick the Edit Icon next to the portlet you wish to edit
- 2) Modify the name of the portlet in the text box to the right of the Name field
- 3) Click Rename

Note: The only change you can make to a portlet is its display name.

Customize page Default Page

Properties Content Layout Security

Rename Portlet: Portal Overview

Name can contain letters, digits, spaces, single quotes, brackets and signs -,! and .. Each open bracket should have a corresponding close bracket.

Name

To delete a Portlet from a page:

- 1) Click the 'Customize this Page' link
- 2) You will find each portlet on the page listed with a Delete Icon to the right of the portlets
- 3) Click the Delete Icon
- 4) Confirm that you do in fact want to delete the Portlet from the page

Note: Deleting a Portlet deletes, all content within that portlet. This is not reversible. Perform this task with caution.

To organize Portlets on a page:

- 1) Click the 'Layout' tab
- 2) Choose the num of columns you would like by clicking the appropriate image under the 'Choose a Column Layout' header
Note: 2 Column layout is recommended.
- 3) To move a portlet up or down within a column, select the portlet and click the appropriate arrow button
- 4) To move a portlet from one column to another, select the portlet and click the column's image above the correct column
- 5) Click 'Save' button

Customize page Default Page

Properties Content Layout Security

Choose a Column Layout


Choose the number of columns you would like. We recommend a two column layout unless you have a large monitor (1280x1024 or bigger).

☐ One ☒ Two - Even ☐ Two - Wide Left

☐ Three - Even ☐ Three - Wide Left ☐ Three - Wide Center

Arrange Portlets

Click the column's image to move any selected portlets to that column. Use the arrows below the box to move portlets up and down within a column. To add or delete portlets, use **Content** tab.



Save

Exit