

Compoze Portlets

for BEA WebLogic Portal
version 2.0



User's Guide

cp20ug/0001

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About the License Key

Before you can use Compoze Portlets, you need to place your 30-day evaluation license in the `license` folder as follows:

```
%COMPOZE_HOME%\license\license.xml
```

To use the Compoze Portlets beyond the 30-day evaluation period, you will need to contact Compoze Software about purchasing a full-version license.

Changing IP Addresses

The full-version license contains the IP address(es) of the machine(s) that you specify Compoze Portlets will be running on. If you change the IP addresses on that machine, the existing license will no longer be valid, and you will need to contact support@compoze.com about getting a new license.



Introduction to Compoze Portlets

The Compoze Portlets is a collection of portlets that provide collaborative functionality to BEA WebLogic Platform 8.1. Compoze Portlets enable users access to personal calendars, address books, task lists and mail all within an Enterprise Portal. Adding this functionality brings personal information to the user, where and when they require.

Compoze Portlets include portlets for accessing Microsoft Exchange and Lotus Domino. The following table outlines which portlets are delivered for each application:

Portlets	Description
MS Exchange 5.5 and 2000	Includes portlets for mail, calendar, address book and task list. See “ compoze_portlets_exchange_setup_guide.pdf ” for installation instructions and detailed supported platforms.
Lotus Domino R5 and R6	Includes portlets for mail, calendar, address book and task list. See “ compoze_portlets_lotus_setup_guide.pdf ” for installation instructions and detailed supported platforms.

This guide and the accompanying Setup Guides show you how to set up the Compoze Portlets and then use them from the “Avitek” Sample Portal delivered with the BEA WebLogic Portal. To get started, open and follow the steps in the appropriate Setup Guide(s) located at %COMPOZE_PORTLETS_HOME%\docs, then return to this User’s Guide to start using the portlets.



Working with Compoze Portlets

Once you started your Sample portal (available with the BEA Weblogic Platform 8.1), you can view and use them from within the “Avitek” Sample Portal. This chapter shows you how to get the “Avitek” Sample Portal started, and how to use each of the Compoze Portlets.

To view the portlets inside the sample portal:

1. If it is not already running, start the BEA WebLogic Portal.
2. To access the Sample Portal, from the Start menu, choose Programs > BEA WebLogic Platform 8.1 > Examples > WebLogic Portal > Launch Examples Portal.

or

Open a Web browser and point to:

http://%BEA_SERVER_HOST%:7001/sampleportal/sample.portal

The “Avitek” Sample Portal home page opens. Log in to the portal.

3. Click the My Page tab.

The Compoze Portlets display through this tab.

When you first access them through your portal, they appear in their normal state. A portlet can be maximized so that you are only looking and working in that portlet, or it can be minimized to make room for other portlets on the screen.

This section describes:

- “Using the Calendar Portlet” on page 2-2
- “Using the Address Book Portlet” on page 2-9
- “Using the Mail Portlet” on page 2-13
- “Using the Task Portlet” on page 2-17

Using the Calendar Portlet

The calendar portlets displays information about your personal calendar. The following section describes the different views of the portlet and how to add, edit or delete appointments.

- “Mini-View” on page 2-2
- “Maximized View” on page 2-5
- “Configuring the Calendar Portlet” on page 2-9

Mini-View

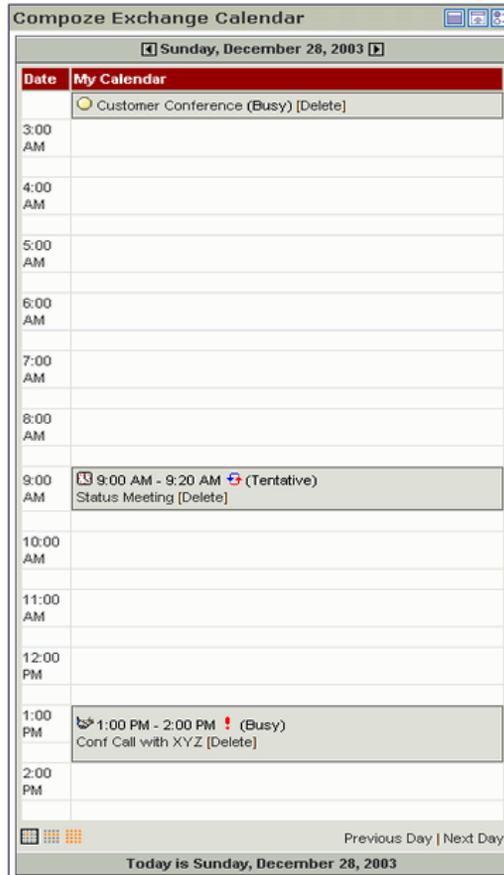
The mini-view can display appointments in a day, week or month view. The first time you use the portlet, the mini-view defaults to the day view. You can navigate to the day, week or month mini-view by using the icons in the lower left of the portlet.



You can set which view is displayed each time you open the calendar. Just select day, week or month under "Default Mini-View" in the General Preferences section. For more information, see “Configuring the Calendar Portlet” on page 2-9.

Day View

The day view displays appointments for a specific date (displayed at the top of the day view). You can navigate to the previous or next day by using the arrows on the left and right of the date, or by using the previous/next day links at the bottom of the day view.



The default time range to display on a date is from 8:00am to 5:00pm ("Working Hours"). If you schedule an appointment outside the hours displayed in the day view, the portlet will add a new line to your day view for that time. There is no need to shift to a start or end times.

Also, the time interval between each hour is 30 minutes by default. This can be set to 15 minutes, 30 minutes or 1 hour. For more information, see “Configuring the Calendar Portlet” on page 2-9.

Week View

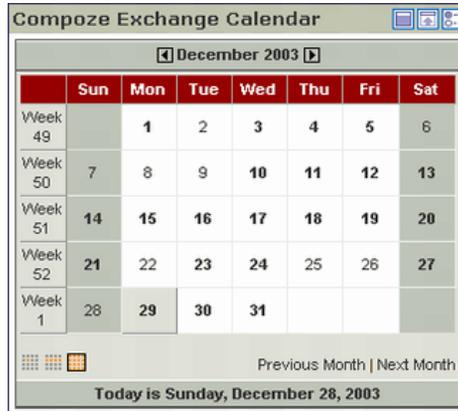
The week view displays appointments for a given week, starting from a specified date. You can navigate to the previous or next week by using the arrows on the left and right of the date, or by using the previous/next week links at the bottom of the week view.



The default starting day for the week is the current day. Seven days (a complete week) are displayed from that date. The default starting-day can be configured to support either the current day or a specific weekday (i.e. Monday, Tuesday, etc.). For more information, see “Configuring the Calendar Portlet” on page 2-9.

Month View

The month view displays appointments for a complete month. Days of the month that have appointments are shown in bold. You can navigate to the previous or next month by using the arrows on the left and right of the date, or by using the previous/next month links at the bottom of the month view.



Maximized View

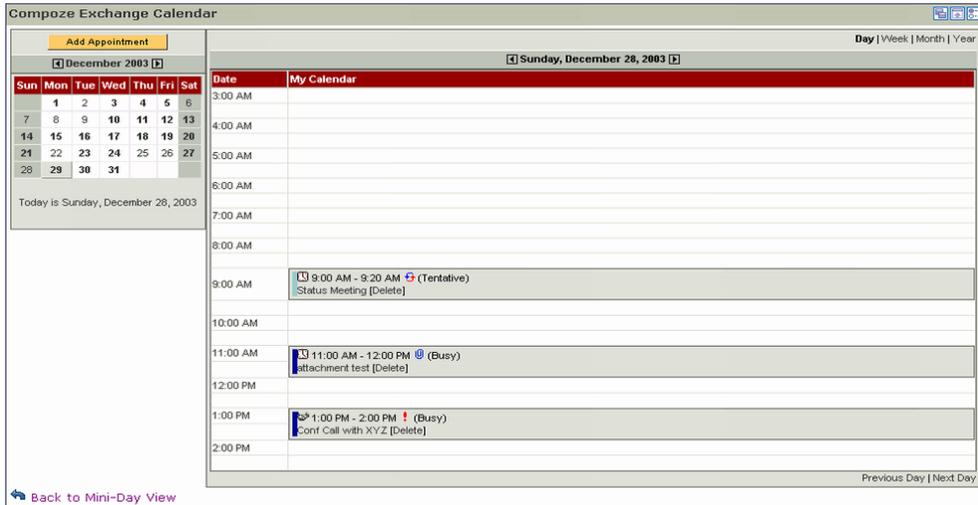
You can view your calendar by day, week, month, or year. Use the navigation links in the upper right of your calendar to change views.

You can set which view is displayed each time you open the calendar. Select day, week, month, or year under "Default View" in the General Preferences section. For more information, see "Configuring the Calendar Portlet" on page 2-9.

Day View

The day view displays appointments for a specific date (displayed at the top of the day view). You can navigate to the previous or next day by using the arrows on the left and right of the date, or by using the previous/next day links at the bottom of the day view.

The day view also presents a mini-month view in the left column to quickly jump to a specific date.

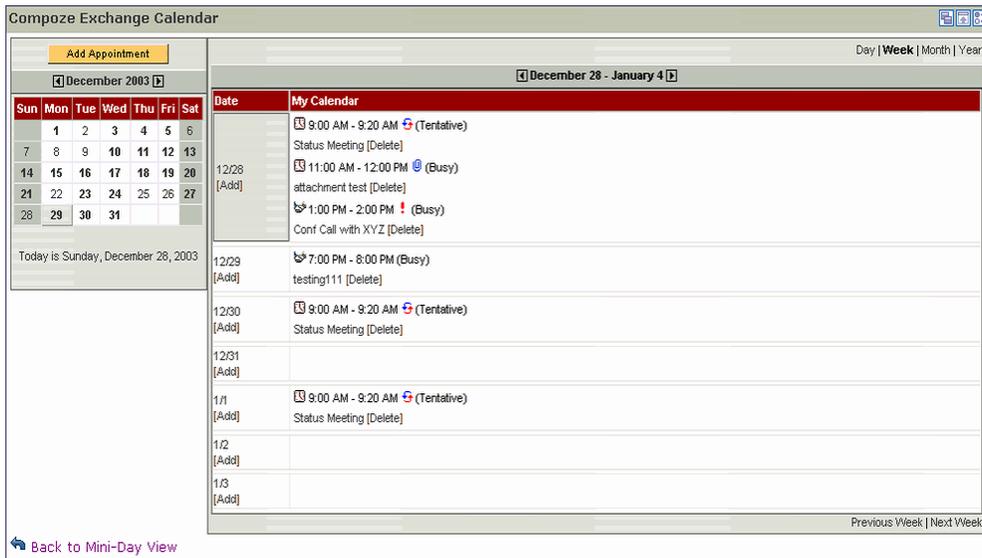


The Time Interval between each hour is 30 minutes by default. This can be set to 15 minutes, 30 minutes or 1 hour. For more information, see “Configuring the Calendar Portlet” on page 2-9.

Week View

The week view displays appointments for a given week, starting from a specified date. You can navigate to the previous or next week by using the arrows on the left and right of the date, or by using the previous/next week links at the bottom of the week view.

The week view also presents a mini-month view in the left column to quickly jump to a specific date. These links will bring you back to the day view.



The default starting day for the week is the current day. Seven days (a complete week) are displayed from that date. The default starting-day can be configured to support either the Current Day or a specific weekday (i.e. Monday, Tuesday, etc.). For more information, see “Configuring the Calendar Portlet” on page 2-9.

Month View

The month view displays appointments for a complete month. You can navigate to the previous or next month by using the arrows on the left and right of the date, or by using the previous/next month links at the bottom of the month view. Days of the month that have appointments show a small section of the appointment subject and the starting time (or 'All Day' if an all day appointment).

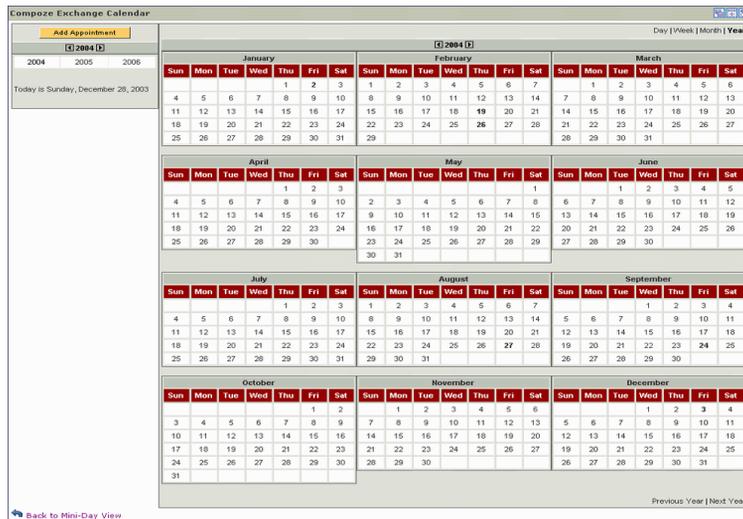
The month view displays a list of the months of the year to quickly jump to a specific month.



Year View

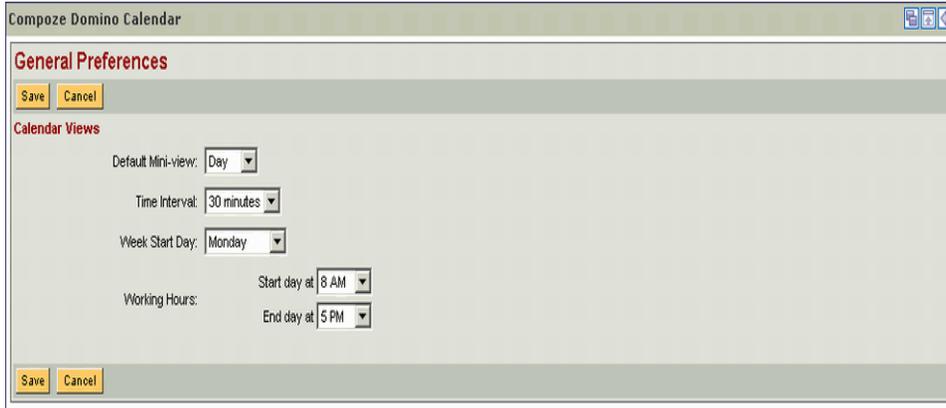
The year view displays all 12 months in a specified year. Days of the month that have appointments are shown in bold. You can jump to the month view of a specific month by clicking the month name. You can also jump to a specific day by clicking the day.

The year view displays the next 2 years to quickly jump to a specific year.



Configuring the Calendar Portlet

By entering the edit mode of the portlet, you can configure the preferences of the calendar portlet.



From General Preferences, you can set the default mini-view (day, week or month), the default view (day, week, month or year), the day Time Interval (15 minutes, 30 minutes or 1 hour), the day view start and end times ("Working Hours"), and the week start day (Current Day, Sunday, Monday, etc.).

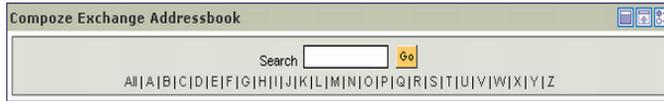
Using the Address Book Portlet

The Address Book portlet allows you to add, edit, and delete members in your personal address book. The following section describes the different views of the portlet and how to add, edit or delete contacts:

- "Mini-View" on page 2-10
- "Maximized View" on page 2-11
- "Configuring the Address Book Portlet" on page 2-13

Mini-View

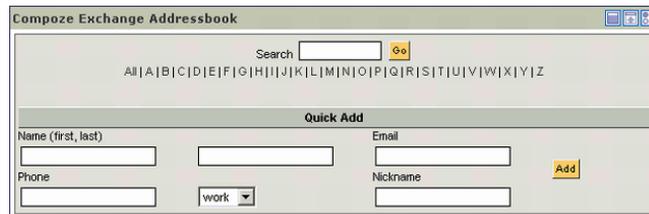
The Mini-View provides a way to jump to specific contacts by name or search keyword.



To view all contacts in your address book, click the All link. You can search for contacts alphabetically by selecting the link for the first letter of the contact's last name.

To search contacts, enter a phrase or word in the text box and press Go.

A Quick Add form can be optionally displayed on the Mini-View. This allows you to enter first and last name, email address, nickname, and primary phone number for a contact without having to switch to the Maximized View.



Maximized View

In the Maximized View, you can navigate through pages of contacts, delete, add new contacts, search, or jump to specific names by first letter of the last name.



The number of contacts displayed on each page can be set in the General Preferences section of the portlet edit view. For more information, see “Configuring the Address Book Portlet” on page 2-13.

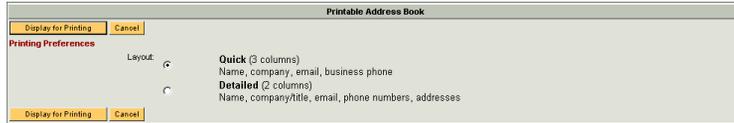
Contact Details

By clicking on a contact name, the contact details are displayed. The details include all contact fields that are set.



Printable View

This view allows you to generate a view for printing of you address book. By selecting the Printable View link, you are prompted to select a layout mode:



Layout Mode	Description
Quick	Creates a 3-column view of core contact information (name, company, email and phone)
Detailed	Creates a 2-column view of all contact information (name, company information, personal information, email addresses and phone numbers)



Configuring the Address Book Portlet

By entering the edit mode of the portlet, you can configure the preferences of the address book portlet.



From General Preferences, you can set the number of contacts to display on a single page in the Maximized view. You can also select whether to display the Quick Add form on the Mini-View.

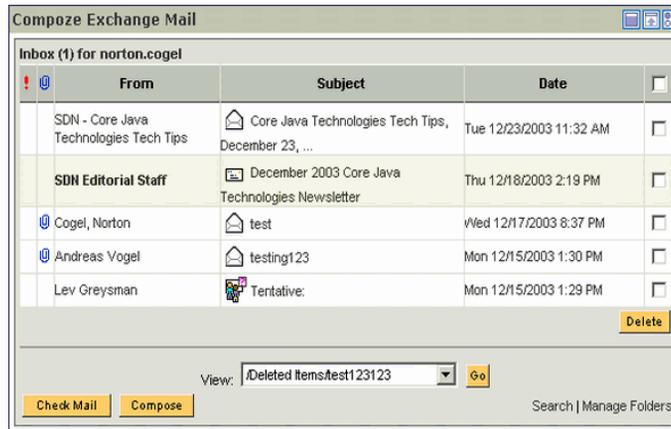
Using the Mail Portlet

The mail portlet allows you to send, receive and manage your email. The following section describes the different views of the portlet and how to perform the basic functions:

- “Mini-View” on page 2-14
- “Maximized View” on page 2-14
- “Configuring the Mail Portlet” on page 2-16

Mini-View

The Mini-View provides an overview of your mail **Inbox**. This view shows a number (by default, 5) of the latest email messages. You can navigate through the messages, check for new mail, and jump to the **Inbox** or any other folder in your mailbox.



The Mini-View can be customized to configure the number of messages to display and specify a filter to only show messages from certain people. For more information, see “Configuring the Mail Portlet” on page 2-16.

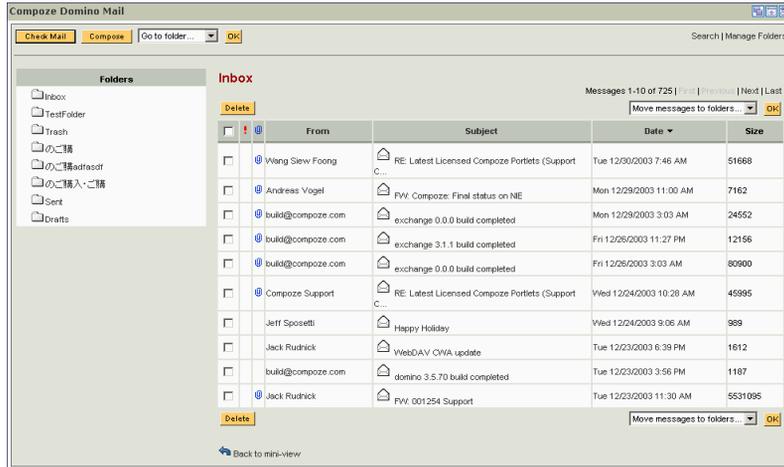
Maximized View

In the Maximized View, you can navigate through messages in your folders. You can move and delete, view the subject, sent date, from, priority and attachment status of messages.

In the default Maximized View, messages can be displayed in two possible ways: Messages and Folders or Messages only. This setting can be configured in the General Preferences section of the portlet edit view. For more information, see “Configuring the Mail Portlet” on page 2-16.

Messages and Folders

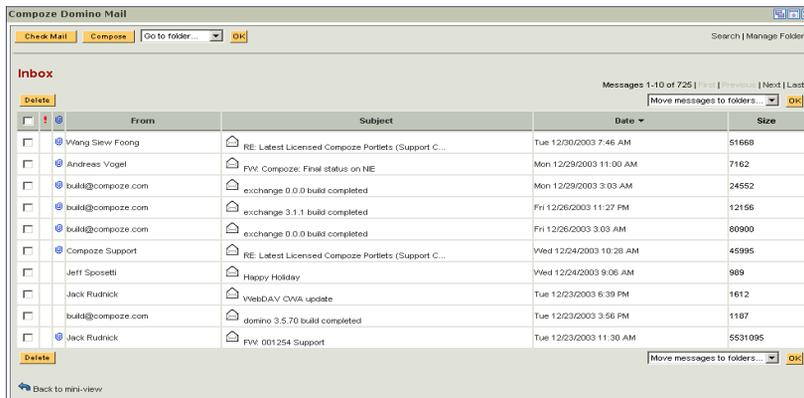
This view displays folders on the left to navigate through and message on the right.



The number of messages displayed on each page can be set in the General Preferences section of the portlet edit view. For more information, see “Configuring the Mail Portlet” on page 2-16.

Messages only

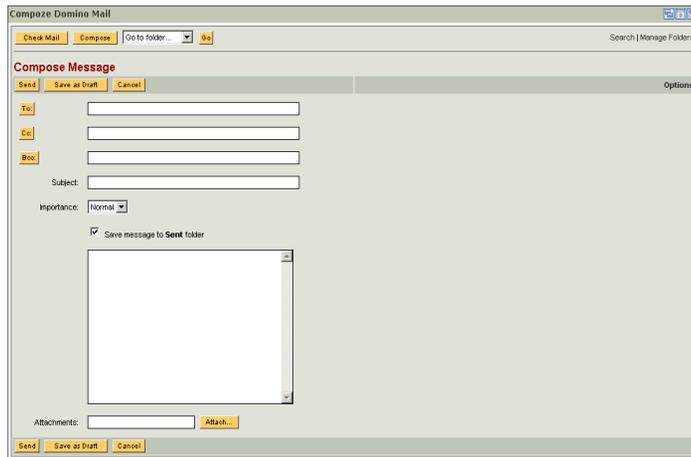
This view displays only messages. You can use the “Go to folder...” drop-down to navigate to a specific folder.



The number of messages displayed on each page can be set in the General Preferences section of the portlet edit view. For more information, see “Configuring the Mail Portlet” on page 2-16.

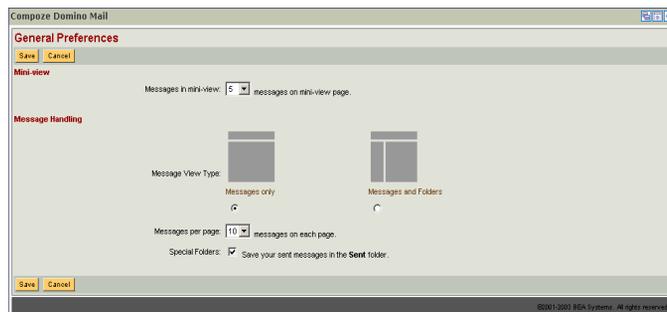
Compose Message

You can create a new message by setting the to, cc, bcc, subject and message body. The message can be sent or saved as a draft. You can identify recipients by using the address book by clicking on the “To”, “Cc”, or “Bcc” buttons.



Configuring the Mail Portlet

By entering the edit mode of the portlet, you can configure the preferences of the mail portlet.



From General Preferences can configure the Mini-View. You can select how many messages to display (5, 10, 15). Also, you can enter filters, either a complete email address or just a domain, to only show messages with the matching 'from' filter.

For the Messages views, you can configure the new mail indicator highlight color (Not available with Lotus Domino Mail Portlet), whether to display Messages Only or Messages and Folders in the Maximized View, the number of messages to display on a single page, and whether to save new messages to the **Sent** folder.

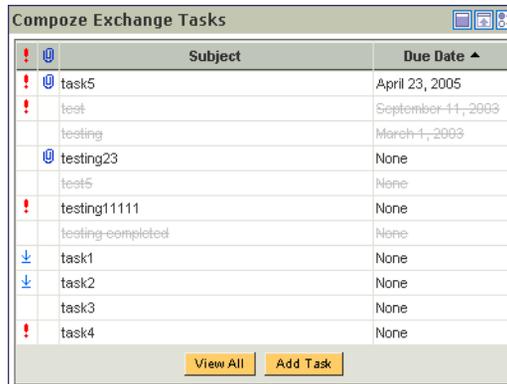
Using the Task Portlet

The task portlet allows you to add, edit, and delete personal tasks. The following section describes the different views of the portlet and how to add, edit or delete tasks:

- “Mini-View” on page 2-17
- “Maximized View” on page 2-18
- “Configuring the Task Portlet” on page 2-18

Mini-View

The Mini-View provides an overview of your current tasks.



The screenshot shows a window titled "Compoze Exchange Tasks" with a table of tasks. The table has two columns: "Subject" and "Due Date". The tasks listed are: task5 (Due Date: April 23, 2005), test (Due Date: September 11, 2003), testing (Due Date: March 1, 2003), testing23 (Due Date: None), test5 (Due Date: None), testing11111 (Due Date: None), testing-completed (Due Date: None), task1 (Due Date: None), task2 (Due Date: None), task3 (Due Date: None), and task4 (Due Date: None). There are also "View All" and "Add Task" buttons at the bottom of the table.

	Subject	Due Date ▲
!	task5	April 23, 2005
!	test	September 11, 2003
	testing	March 1, 2003
U	testing23	None
	test5	None
!	testing11111	None
	testing-completed	None
↓	task1	None
↓	task2	None
	task3	None
!	task4	None

By default, the Mini-View displays five tasks. The number of tasks and specific task status can be set in the General Preferences section of the portlet edit view. For more information, see “Configuring the Task Portlet” on page 2-18.

Maximized View

In the Maximized View, you can navigate through pages of tasks, edit, delete, add new tasks, search, or quick filter by complete/not complete status.



The number of tasks displayed on each page can be set in the General Preferences section of the portlet edit view. For more information, see “Configuring the Task Portlet” on page 2-18.

Configuring the Task Portlet

By entering the edit mode of the portlet, you can configure the preferences of the task portlet.



From General Preferences, you can set the number of tasks to display in the mini-view or on a single page in the Maximized view. For the mini-view, you can select whether to only

show tasks with a specified status. You can also select whether to display the Quick Add form on the Mini-View.



Installation

This section describes how to run the installer or install Compoze Portlets on the various platforms:

- “Installing Compoze Portlets on Windows” on page 4-1
- “Installing Compoze Portlets on UNIX” on page 4-2
- “Troubleshooting” on page 4-2

Note: when using the installer, if a problem occurs during the installation, hold down the control (`ctrl`) key while starting the installer until a console appears. You will see some output that explains the problem in more detail. If you are still having problems with the installer, send this output along with a description of the problem to support@compoze.com.

Installing Compoze Portlets on Windows

To install Compoze Portlets with the installer, unzip the Compoze Portlets ZIP file (`compoze_portlets_bea-win-2.0.x.zip`) and run the installer executable (`install.exe`) and follow the instructions. Compoze Portlets will install and copy files to the Compoze Home (`%COMPOZE_HOME%`) directory and into the Sample Portal, found under the BEA WebLogic Platform 8.1.

Installing Compoze Portlets on UNIX

To install Compoze Portlets with the installer:

1. Unzip the Compoze Portlets ZIP file (`compoze_portlets_bea-unix-2.0.x.zip`)
2. Change the execute permissions on the installer executable (`./install.bin`) using the UNIX `chmod` command.

```
chmod 775 install.bin
```

3. Run the installer executable (`./install.bin`) and follow the instructions. Compoze Portlets will install and copy files to the Compoze Home (`%COMPOZE_HOME%`) directory and into the Sample Portal, found under the BEA WebLogic Platform 8.1.

To uninstall the Compoze Portlets:

1. Change to the `%COMPOZE_HOME%/compoze_portlets_bea-2.0/UninstallerData` directory.
2. Run the Uninstaller executable (`./Uninstaller`).

Troubleshooting

If you are experiencing problems and you are in need of assistance, before notifying Compoze support, please determine that you have the that one of the following common problems is not occurring:

ERROR:

An application error is generated on Windows 2000. The error occurs in `wjview.exe`.

Possible Cause:

3. Your BEA WebLogic JDK is not in your system `PATH`.
4. You do not have a Java Runtime Environment (JRE) or Java Development Kit (JDK) installed on your machine.

Resolution:

Add the BEA WebLogic JDK bin directory (for example, `c:\bea\jdk141_03\bin`) to the Windows `PATH` environment variable. This can be done by appending the JDK to the `PATH` environment variable at Start > Control Panel > System > Advanced > Environment Variables.