

# Managing the Precise Custom Dashboard

This section includes the following topics:

- [About the Control panel](#)
- [About the Administration portlets](#)
- [About the Tools portlets](#)
- [Configuring the portlet](#)
- [Defining the portlet data preferences](#)
- [Removing a portlet package from the Precise Custom Dashboard](#)
- [Where to go for more information](#)

## About the Control panel

The Control panel lets you control which content a user can view by setting up roles for different users and assigning users to different groups. Assigning users to specific groups helps you administer the dashboard more efficiently. You can then assign roles or permissions to a group of users, instead of assigning them to individual users.

The following types of administration pages provide different scopes of administration:

- **User administration.** Lets you configure the settings of the logged in user.
- **Portal administration.** Lets you configure the highest level of administrative features. It provides access to all organization, roles, user groups, and user administration features in addition to portal settings and advanced content management.
- **Server administration.** Lets you administrate server related settings and plugins installations.

## Changing the time zone

The administrator can change the time zone for the entire company by editing the company profile. Users can change their time zone setting on the My Account page in the Display settings entry.

To adjust the time zone settings for the entire company

1. Go to **Control Panel>Portal>Settings**.
2. In the Display Settings entry, you can set the time zone.
3. Click **Save**.

To adjust the time zone settings for an individual's account

1. Click **My Account**.
2. On the Display settings, in the Time Zone field, set the time zone by selecting a zone from the drop-down list.
3. Click **Save**.

## Setting up user profiles

A user can belong to more than one user group. Users inherit the roles and permissions of the group they are assigned to. The permissions and roles assigned to a user determine the tasks the user can perform.

Before a user signs into the dashboard, he is considered a guest. Guest users have their own set of default permissions which can be customized by administrators. After a user signs into the dashboard, he is considered a registered user. Permissions are assigned to registered users as follows:

- Directly to the user
- To a community that the user belongs to
- To an organization that the user belongs to
- To a role that is directly assigned to the user
- To a role assigned to a community that the user belongs to
- To a role assigned to an organization the user belongs to

See [Configuring roles in the dashboard](#) and [Where to go for more information](#).

To set up a new user profile

1. Go to **Control Panel>Portal>Users**.
2. Click **Add**.
3. Fill in the relevant information for the new user. You must enter a screen name, email address, first name, and last name.
4. Click **Save**.
5. Click **Password**.
6. Enter the password and confirm it.
7. Click **Save**.
8. Click **Back** to return to the Users

You can now add this user to an organization, community, and user group. You can also determine what the user will be allowed to do, such as, add permissions, or update and view information detailed information on the user's profile settings.

To edit an existing user's profile

1. Go to **Control Panel>Portal>Users**.
2. Click the Actions button on the row of the user you want to edit.
3. Click **Edit**.
4. Make the required changes.
5. Click **Save**.

To delete a user profile

1. Go to **Control Panel>Portal>Users**.
2. Search for the user that you want to remove.
3. Select the user.
4. Click **Disable**.
5. Click **OK**.
6. Use Advanced search to search for deactivated users (Active: No).
7. Select the required user and click **Delete**.



You can also restore a deactivated user at this stage.

8. Click **OK** if you want to permanently delete the user.

## Setting up user groups

Organizing users in a group lets you assign roles to more than one user at a time, and helps you administer your organization more efficiently. Both roles and individual permissions can be assigned to user groups. Every user belonging to a user group will receive the roles or permissions of the user group.

To set up a new user group

1. Go to **Control Panel>Portal>User Groups**.
2. Click **Add**.
3. Type in the name of the new group in the Name field.
4. Add a description.
5. Click **Save**.

To edit a user group

1. Go to **Control Panel>Portal>User Groups**.
2. Click the Actions button on the row of the user group you want to edit.
3. Click **Edit**.
4. Make the required changes.
5. Click **Save**.

To delete a user group

1. Go to **Control Panel>Portal>User Groups**.
2. In the table, select the group or groups that you want to delete.
3. Click **Delete**.
4. Click **OK**.

## Setting up Organizations

To add an organization

1. Go to **Control Panel>Portal>Organizations**.
2. Click **Add**.
3. Insert the name of the Organization.
4. Click **Save**.



If the Organization is part of a larger organization, first create the parent organization (select Regular Organization) and then create the sibling by adding its name, selecting Country, Region (if any), click Select, and selecting the parent organization.

To edit an organization

1. Go to **Control Panel>Portal>Organizations**.
2. Click the Actions button on the row of the organization you want to edit.
3. Click **Edit**.
4. Make the required changes.
5. Click **Save**.

To delete an organization

1. Go to **Control Panel>Portal>Organizations**.
2. Remove all Assigned Members from the relevant organization
  - a. Click **Actions>Assign Members** on the row of the relevant organization.
  - b. Clear the check marks in front of the members.

- c. Click **Update Associations**.
3. Click **Back**.
4. Select the organization that you want to delete
5. Click **Delete**.
6. Click **OK**.

## Creating Communities

To add an community

1. Go to **Control Panel>Portal>Communities**.
2. Click **Add**.
3. Fill in the relevant information for the community, such as Name and Description.
4. Select the community type:
  - **Open**. Available for all users.
  - **Restricted**. Available for a restricted group of users.
  - **Private**. Only available for you.
5. Mark the checkbox to make the community active.
6. Optionally, add one or more tags.
7. Click **Save**.

To edit an community

1. Go to **Control Panel>Portal>Communities**.
2. Click the Actions button on the row of the community you want to edit.
3. Click **Edit**.
4. Make the required changes.
5. Click **Save**.

To delete an community

1. Go to **Control Panel>Portal>Communities**.
2. Select the community that you want to delete
3. Click **Delete**.
4. Click **OK**.

## Managing User Groups, Organizations, and Communities

To add a user to a user group

1. Go to **Control Panel>Portal>User Groups**.
2. Click the Actions button on the row of the user group to which you want to add a user.
3. Click **Assign Members**.
4. On the Available tab, select the users that you want to add to the user group or search for the required user(s) and select them.
5. Click **Update Associations**.
6. Select the Back icon.

To delete a user from a user group

1. Go to **Control Panel>Portal>User Groups**.
2. Click the Actions button on the row of the user group from which you want to delete a user.
3. Click **Assign Members**.
4. Clear the check box next to the users that you want to remove from the group.
5. Click **Update Associations**.
6. Select the Back icon.

To assign users to an organization

1. Go to **Control Panel>Portal>Organizations**.
2. Click the Actions button on the row of the organization to which you want to add a user.
3. Click **Assign Members**.
4. On the Available tab, select the users that you want to add to the organization or search for the required user(s) and select them.
5. Click **Update Associations**.
6. Select the Back icon.

To remove users from an organization

1. Go to **Control Panel>Portal>Organizations**.
2. Click the Actions button on the row of the organization from which you want to delete a user.
3. Click **Assign Members**.
4. Clear the check box next to the users that you want to remove from the organization.
5. Click **Update Associations**.
6. Select the Back icon.

To assign users, user groups, or organizations to a community

1. Go to **Control Panel>Portal>Communities**.
2. Click the Actions button on the row of the community to which you want to add a user, user group, or organization.

3. Click **Assign Members**.
4. Select the tab with the entity you want to take members from.
5. On the Available tab, select the users, user groups, or organizations that you want to add to the organization or search for the required user(s) and select them.
6. Click **Update Associations**.
7. Select the Back icon.

To delete users, user groups, or organizations from a community

1. Go to **Control Panel>Portal>Communities**.
2. Click the Actions button on the row of the community from which you want to delete a user, user group, or organization.
3. Click **Assign Members**.
4. Select the tab with the entity you want to clear the selection of the members from.
5. Clear the check box next to the users, user groups, or organizations that you want to remove from the organization.
6. Click **Update Associations**.
7. Select the Back icon.

## Configuring roles in the dashboard

Roles are a collection of permissions. The Roles mechanism lets you control which portlets a user can view. Roles can be assigned to a user, community, or organization. If a role is assigned to a community or organization, all users that are members of that entity receive the collection of permissions assigned to that role.

Begin by settings up roles, associating permissions with them, and assigning them to individual users or communities. Then you can assign a role or roles to a portlet to determine which users can access the information displayed in that portlet.

See [Determining which portlets a user can view](#) and [Where to go for more information](#).

To set up a new role

1. Go to **Control Panel>Portal>Roles**.
2. Click **Add**, to add a new role.
3. In the Name field, enter a name that identifies the role.
4. Select the type (Regular, Community, Organization)
5. Click **Save**.

To remove a role from the dashboard

1. Go to **Control Panel>Portal>Roles**.
2. Click the Actions button next to the role that you want to remove.
3. Click **Delete**.
4. Click **OK**.

To change a role's name

1. Go to **Control Panel>Portal>Roles**.
2. Click the Actions button next to the role whose name you want to change.
3. Click **Edit**.
4. In the New Name field, enter a name that identifies the role.
5. Click **Save**.

## Managing roles

To assign permissions to a role for a user

1. Go to **Control Panel>Portal>Roles**.
2. Click the Actions button next to the role for a user to which you want to assign permissions.
3. Click **Permissions**.
4. Set the permissions required by checking the relevant permissions.
5. Click **Submit**.
6. Click **Back**.

To assign permissions to a role for an organization


1. Go to **Control Panel>Portal>Roles**.
2. Click the Actions button next to the role for an organization to which you want to assign permissions.
3. Click **Permissions**.
4. Set the permissions required by checking the relevant permissions.
5. Click **Submit**.
6. Click **Back**.

To assign permissions to a role for a user group

1. Go to **Control Panel>Portal>Roles**.
2. Click the Actions button next to the role for a user group to which you want to assign permissions.
3. Click **Permissions**.
4. Set the permissions required by checking the relevant permissions.
5. Click **Submit**.

6. Click **Back**.

To assign permissions to a role for a guest user

 Per definition, a guest user does not have permissions, but it is possible to change this as described in the following procedure.

1. Go to **Control Panel>Portal>Roles**.
2. Click the Actions button next to the role for a guest user to which you want to assign permissions.
3. Click **Define Permissions**.
4. Select either to **Add Portlet Permissions** or **Add Portal Permissions**.
5. Set the permissions required by checking the relevant permissions.
6. Click **Save**.
7. Click **Back**.

To assign a role to an end user

1. Go to **Control Panel>Portal>Roles**.
2. Click the Actions button next to the end user that you want to assign a role to.
3. Click **Assign Members**.
4. On the Users tab, click **Available**.
5. Select the users that you want to add the role to.
6. Click **Update Associations**.
7. Click **Back**.

To assign a role to a community

1. Go to **Control Panel>Portal>Roles**.
2. Click the Actions button next to the community that you want to assign a role to.
3. Click **Assign Members**.
4. On the Communities tab, click **Available**.
5. Select the community that you want to add the role to.
6. Click **Update Associations**.
7. Click **Back**.

To assign a role to an organization

1. Go to **Control Panel>Portal>Roles**.
2. Click the Actions button next to the organization that you want to assign a role to.
3. Click **Assign Members**.
4. On the Organizations tab, click **Available**.
5. Select the organization that you want to add the role to.
6. Click **Update Associations**.
7. Click **Back**.

To assign a role to a user group


1. Go to **Control Panel>Portal>Roles**.
2. Click the Actions button next to the user group that you want to assign a role to.
3. Click **Assign Members**.
4. On the User Groups tab, click **Available**.
5. Select the user group that you want to add the role to.
6. Click **Update Associations**.
7. Click **Back**.

To delete a role from an entity

1. Go to **Control Panel>Portal>Roles**.
2. Click the Actions button next to the entity from which you want to delete a role.
3. Click **Assign Members**.
4. On the tab for the selected entity, click **Available**.
5. Clear the checkbox for the role that you want to delete.
6. Click **Update Associations**.
7. Click **Back**.

## Changing user passwords

The administrator can change a user's password by editing the user's profile. Users can change their own individual password on the My Account page.

 If you want to receive email notification when you create a password for a new user or if you forget your password, verify that you install a SMTP server on the same machine the Precise Custom Dashboard is installed on.

To change another user's password

1. Log in to the Precise Custom Dashboard with administrator privileges.

2. Go to **Control Panel>Portal>Users**.
3. Verify that the user is active. Search for the user whose password you want to change.
4. Click the **Actions** button.
5. Click **Edit**.
6. On the Password tab, type in the new password in the **Password** and **Enter Again** fields.
7. Check **Password Reset Required** if you want the system to prompt the user to reset the password automatically.
8. Click **Save**.

To change your own password

1. Log in to the Precise Custom Dashboard as the user whose password you want to change.
2. Click **My Account**.
3. On the Password tab, type in the new password in the **Password** and **Enter Again** fields.
4. Click **Save**.

## Setting up an enterprise profile

The enterprise profile contains the settings that will be used as default settings, each time a new user is added. For example, you can specify the enterprise name, which logo to display in the dashboard, set up the link the user will navigate to when clicking on Home or the logo, and the domain names that the server will recognize.

You can also change the time zone and language settings for the entire enterprise.

## Determining which portlets a user can view

The Portlets tab displays a list of all available portlets, indicates whether they are currently active or inactive, and shows which groups have permission to use each portlet. You can edit a portlet's properties, as follows:

- Determine whether to make the portlet active or inactive.
  - Assign which roles that will have access to the selected portlet. To edit a portlet's properties
1. Go to **Control Panel>Portal>Plugins Configuration**.
  2. In the Plugins list, click the portlet that you want to edit.
  3. In the text box, type the roles that you want to be associated with the selected portlet, one role per line. A user must belong to one of these roles to be able to add this portlet to a page.
  4. Click **Save**.
  5. Click **Back**.

## Deploying portlet packs

The files that configure and define portlet packs are packaged as WAR files. Use these WAR files to hot-deploy portlet packs in the Precise Custom Dashboard.

To hot-deploy a portlet or adapter

1. On **Control Panel>Server>Plugins installation**, click **Install More Portlets**.
2. Go to **Upload file**.
3. Browse for the WAR file.
4. Click **Deploy**. The hot-deploy process can take a number of seconds to complete.

## How to configure LDAP

Precise Custom Portal version 9.6 can integrate with Lightweight Directory Access Protocol (LDAP).

Once integrated with LDAP, Precise Custom Portal version 9.6 gets all users and groups from the LDAP and synchronizes them into its own database. Login passwords are authorized by LDAP, thus preventing the need to keep (and verify) the users' passwords within Precise Custom Portal. The following procedure describes how to configure LDAP.

To configure LDAP

1. Log in as Admin user to Custom Portal version 9.6.
2. Go to **Control Panel>Settings>Authentication>LDAP**.
3. Under **Authentication**, mark **Enabled**.
4. Under **Default Values**, mark **Microsoft Active Directory Server**.
5. Under **Connection**, provide the parameters described in the following table:

Parameter	Description
Base Provider URL	<url_of_the_base_provider>
Base DN	<base_dn>
Principal	<domain_name>\<user_name>
Credentials	<password>

6. Under **Users**, provide the parameters as described in the following table:

Parameter	Description
Authentication Search Filter	(&(objectCategory=person)(sAMAccountName=@screen-name@))
Import Search Filter	((objectclass=person)
User name	<user_name>
Password	<password>
Email address	<email_address>
First name	<given_name>
Last name	<last_name>
Job title	<title>

7. Under **Groups**, do not mark/configure anything.

8. Under Import/Export, mark or clear the parameters as described in the following table:

Parameter	Description
Import enabled	Mark
Import on startup enabled	Mark
Import interval	Any selection as long as it is not grayed-out.
Export enabled	Do not check this box.

9. Under **Password policy**, mark the “Use LDAP Password Policy” check box.

## About the Administration portlets

The Administration portlets provide administrative utilities that expand the functionality of the Precise Custom Dashboard.

The following portlets are available:

- **Adapter Settings.** Lets you retrieve data from a specific source.
- **Portlet Upgrader.** Lets you upgrade all portlets that are using the same Precise installation (source) to another Precise installation (destination).
- **Refresh Rate Setting.** Lets you configure how often the information displayed in the dashboard is refreshed.

## About the Adapter Settings portlet

An adapter retrieves data from a specific data source. An adapter is defined by a unique identifier, called the Adapter Identifier, and the parameters that define where it should retrieve information from.

The Adapter Settings portlet lets you add adapters to and remove adapters from the dashboard framework, and define data sources for each adapter.



Each data source represents an installation from which information is retrieved and displayed. An adapter can be associated with more than one data source.

Each data source has several fixed fields as well as fields that vary according to the adapter. For example:

- A DBAdapter represents an adapter for a database. Each data source defines a specific connection with a database.
- A Precise adapter represents the connection between the Precise Custom Dashboard and Precise.

The Precise adapter enables the user to communicate with different Precise installations from different versions.


The AES encryption method is used as the default communication encryption method. For the adapter to communicate with the data source in the configuration process, the user is prompted to copy the encryption key files from the Precise installation to the Precise Custom Portal installation.

The files reside in Precise under the <precise\_root> /infra/listener/etc/crypt folder. The entire crypt folder should be copied to the Precise Custom Portal under the <precise\_root> /products/gui/website/asd\_conf/data-sources-crypt/ <data source server>-<data source port> folder.

The following table describes the parameters you need to define for all types of adapters. Any additional fields that must be defined for a particular adapter are described in the help topics that are deployed with each adapter.

**Table 3-1.** Fixed Adapter Data Source fields

Field	Description
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Name	A unique user-defined name that identifies the data source. the identifier is displayed in the Data source list when you edit a portlet.
User group	Indicates which user group has been granted permission to view information from this data source. This parameter is case-sensitive. <div>  If the Group parameter is left empty, every user can view information from this data source. </div>

See [About the DBAdapter](#), [About the Retrieve from Database portlet](#), and [Assigning permissions to adapters through user groups](#).

To add an adapter

1. In the Adapter Settings portlet, on the Adapter Identifier field, click **Add**.
2. In the Adapter Address field, type the address of the adapter Web service.
3. Click **OK**.

To edit an adapter

1. Select the adapter.
2. In the Adapter Address field, change the address of the adapter Web service.
3. Click **OK**.

To delete an adapter

1. In the Adapter Settings portlet, on the Adapter Identifier field, click **Remove**.
2. Click **OK**.

To add a data source

1. In the Adapter Settings portlet, from the Adapter Identifier list, select the Adapter that you want to add a data source to.
2. Click **Add Data Source**.
3. Enter the parameters that define the selected data source.
4. Click **OK**.

To edit a data source

1. In the Adapter Settings portlet, from the Adapter Identifier list, select the Adapter whose data source you want to edit.
2. In the Adapter Data Sources table, locate the data resource that you want to edit.
3. Click **Edit**.
4. Enter the parameters that define the selected data source.
5. Click **OK**.

To delete a data source

1. In the Adapter Settings portlet, from the Adapter Identifier list, select the Adapter whose data source you want to remove.
2. In the Adapter Data Sources table, locate the data resource that you want to remove.
3. Click **Remove**.

## Assigning permissions to adapters through user groups

Using the built-in security mechanism shipped with the Precise Custom Dashboard, you can control which data sources a user can retrieve information from. When you assign permissions to adapters the user can only see information from the data sources that he has been assigned to through his user group.

To assign permissions to an adapter

1. Create a user and associate the user with a user group. You also need to create the specific user group if it does not already exist.
2. In the Adapter Settings portlet, in the Adapter Identifier field, choose the adapter that you want to edit.
3. Do one of the following:
  - Edit an existing data source. Click **Edit**. In the User Group field, type the group that you want the data source to be associated with.
  - Add and define a new data source for the adapter. Click **Add Data Source**. Enter the parameters that define the selected data source. In the User Group field, type the group that you want the data source to be associated with.

## About the DBAdapter

The DBAdapter is the default adapter that is shipped with the Precise Custom Dashboard. This adapter lets you retrieve data from the database of your choice.

The SQL Server JDBC driver is installed automatically during the installation of the Precise Custom Dashboard. If you want to add additional drivers, copy the driver's jar file to the following folder:

```
<precise_root>\products\gui\website\webapps\DBAdapter\WEB-INF\lib\
```

To load the JDBC driver, you are required to restart of the Precise Web GUI service. See [Common JDBC drivers](#).





Only a user with Administrator privileges can configure a database as a data source. This is done in the Adapter Settings portlet.

The Name and Group fields are fixed fields which must be defined for every type of adapter. See [About the Adapter Settings portlet](#) and [About the Retrieve from Database portlet](#).

The following table describes the additional parameters that must be defined for the database adapter to connect to a database.

**Table 3-2** DBAdapter fields

Field	Description
Driver name	<p>Driver Name Name of the database driver. This driver lets you access the database that you want to retrieve information from. For example, to connect to a SQL Server driver, type the following:</p> <pre>com.microsoft.sqlserver.jdbc.SQLServerDriver</pre> <p>The driver must be installed on the same server that the DB adapter is installed on. In many cases this will be the same server that the Precise Custom Dashboard is installed on.</p>
Connection string	<p>Location of the database that you want to connect to and the driver used to connect to it. For example:</p> <pre>jdbc:sqlserver://myServer:9999;DatabaseName=users_99</pre>
User	User name that allows you to access information from the database.
Password	Password that allows the user to access information from the database.

See [About the Adapter Settings portlet](#), [About the Retrieve from Database portlet](#), and [Common JDBC drivers](#).

## Common JDBC drivers

JDBC drivers allow you to connect to databases that support Structured Query Language (SQL).

JDBC technology drivers are available from a number of vendors. The following lists provide information on what values must be entered in the DBAdapter portlet settings for popular databases.

The JDBC drivers need to be saved in:

```
<precise_root>\products\gui\website\webapps\DBAdapter\WEB-INF\lib\
```

The following table shows the information you must enter in the DBAdapter portlet settings to connect to a Microsoft SQL Server (2005) database.

**Table 3-3** Microsoft SQL Server JDBC driver

JDBC driver	Value
Driver name	com.microsoft.sqlserver.jdbc.SQLServerDriver
Connection strong format	jdbc:sqlserver://<host>:<port1433>;DatabaseName=<database>

The following table shows the information you must enter in the DBAdapter portlet settings to connect to a MySQL database.

**Table 3-4** MySQL JDBC driver

JDBC driver	Value
Driver name	com.mysql.jdbc.Driver
Connection string format	jdbc:mysql://<host>:<port>/<databaseName>

The following table shows the information you must enter in the DBAdapter portlet settings to connect to a Sybase database.

**Table 3-5** Sybase JDBC driver

JDBC driver	Value
Driver name	com.sybase.jdbc2.jdbc.SybDriver
Connection string format	jdbc:sybase:Tds:<host>:<port>/<databaseName>

The following table shows the information you must enter in the DBAdapter portlet settings to connect to a Oracle database.

**Table 3-6** Oracle JDBC driver

JDBC driver	Value
Driver name	oracle.jdbc.driver.OracleDriver
Connection string format	jdbc:oracle:thin:@<host>:<port>:<sid>

## About the Portlet Upgrader portlet

This portlet is located in the portlets tree under admin.

The portlet gives you the functionality to upgrade all portlets that are using the same Precise installation (source) to another Precise installation (destination).

The portlet upgrader in the Precise Custom Portal v9.6 supports the portlet upgrade from Precise v8.0 to v8.5, v8.5/v8.7 to v9.0, and v9.0 to v9.6 adapter type data sources. The upgrade process will convert the portlet's request and parameters to match the new data source.

If the conversion logic fails for a portlet, it will be aborted, logged, and the process will continue with the next portlet. The logging output for the portlet upgrade process can be found in the <precise\_root>\products\gui\website\logs\upgrade.log and upgrade-report.log files.

The following table describes the fields that are available in the portlet:

**Table 3-7** Portlet Upgrader portlet

Fields	Description
Source adapter	List of defined adapters
Source data source	List of defined data sources for the selected source adapter
Destination adapter	List of defined adapters
Destination data source	List of defined data sources for the selected destination adapter

See [Configuring the portlet](#).

## About the Refresh Rate Settings portlet

The administrator can configure how often the information displayed in the dashboard is refreshed in the Refresh Rate Settings portlet. These settings apply to all pages on the dashboard.

To configure the refresh rate settings

1. On the Refresh Rate Settings portlet toolbar, click the Edit Preferences icon.
2. In the Page refresh rate (minutes) field, type how often you want the information displayed on the page to be refreshed.
3. Click **OK**.

## About the Tools portlets

The Tools Portlets provide additional utilities that expand the functionality of the Precise Custom Dashboard. The following portlets are available:

- **IFrame**. Lets you display information from a specific URL address.
- **Log In**. Lets you access the My Account dialog box and modify your account settings.
- **Import from Precise**. Lets you create a new portlet page.
- **Quick Note**. Lets you add your own note or comments to a portlet page.
- **RSS**. Lets you display frequently updated Really Simple Syndication (RSS) content in a portlet. Retrieve from Database Lets you query a database and display information from it.
- **Time Frame**. Lets you decide the period of time that you want to analyze.

## About the IFrame portlet


The IFrame portlet lets you display information from a specific URL address. You must have administrator privileges to set up this portlet. See [Configuring the portlet](#), [Changing user passwords](#), and [About the Main menu](#).

## About the Log In portlet

The Log In portlet lets you access the My Account dialog box and modify your account settings. See [Configuring the portlet](#), [Changing user passwords](#), [About the Main menu](#).


## About the Import from Precise portlet

The Import from Precise portlet gives you the functionality to create portlets based on the view that has been exported from within Precise v9.6 using the Export to the Custom Portal Portlet feature.

 Prerequisites for the use of this portlet is that you need to have the rights to add portlets.

To create a portlet with Import from Precise

1. Log in to the Precise Custom Portal.
2. Go to Add Portlet.
3. In the portlets tree under Tools, click **Add after Import from Precise**.
4. Select the data source.
5. Select the name that was used to create the Export to the Custom Portal Portlet view.

 The date and time stamp will help you choose the most recent view. The last 50 saves are available.


6. Click **Generate the Portlet**.
7. Click **Preferences** if you want to change the default configuration. See [Configuring the portlet](#).

## About the Quick Note portlet

The Quick Note portlet lets you add your own note or comments to a portlet page.

## About the RSS portlet

The RSS portlet lets you display frequently updated Really Simple Syndication (RSS) content in a portlet. You subscribe to a feed by entering the feed's URL (one per line) and the number of entries per feed.

 It can take a while before content is displayed in this portlet.

## About the Retrieve from Database portlet


The Retrieve from Database portlet lets you query a database and display information from it. The Administrator must configure the database as a data source (in the Adapter Settings portlet) before you can send it a query.

In the Filter Data By field, enter the name of the data source that you want to retrieve data from and enter an SQL statement that is used to query the database and retrieve the information. An SQL statement must begin with one of the following commands:


- Select
- With

You can also define the time frame for your retrieved information by entering an SQL statement. The time frame has four parameters:

- !~timeFrameFromString~! - This parameter is the start time in yyyy/mm/dd hh:mm:ss a format
- !~timeFrameToString~! - This parameter is the end time in yyyy/mm/dd hh:mm:ss a format  
**Example** To define a time frame that ends at 2010/01/16 02:20:45 am, enter the following query:  
`select* from A where time > '!~timeFrameToString~!'`
- !~timeFrameFromLong~! - This parameter is the start time
- !~timeFrameToLong~! - This parameter is the end time  
**Example** To define a time frame that ends at 123246486, enter the following query:  
`select * from A where time > '!~timeFrameToLong~!'`

 In certain JDBC drivers, such as in Oracle JDBC, a query containing a count(\*) function, must be typed as follows:

```
select count(*) as c1 from table_1
```

 Adding a semi-colon (;) at the end of a query causes a query parse error in some JDBC drivers.

When you choose a display view for the information retrieved from the database, verify that you choose a view that is appropriate to the query you selected.

The following table describes how the information retrieved from a database is displayed.


**Table 3-8** Available display views


Format	Description
Table	Displays the data in table format.
Bar chart	Only numeric data is displayed. Non-numeric data is ignored. The first column of data is displayed along the X-axis. Remaining numeric columns are displayed as values in the chart.
Multiple line chart	Only numeric data is displayed. Non-numeric data is ignored. The first column of data is displayed along the X-axis. Remaining numeric columns are displayed as values in the chart.
Combined multiple line chart	Only numeric data is displayed. Non-numeric data is ignored. The first column of data is displayed along the X-axis. Remaining numeric columns are displayed as values in the chart. This chart has multiple Y-axes, each axis corresponding to a specific line.
Horizontal bar chart	Only numeric data is displayed. Non-numeric data is ignored. The first column of data is always displayed. Remaining numeric columns are displayed as values in the chart.
Line chart	Only numeric data is displayed. Non-numeric data is ignored. The first column of data is displayed along the X-axis. Remaining numeric columns are displayed as values in the chart.
Multiple pie chart	Only numeric data is displayed. Non-numeric data is ignored. The first column of data is displayed as the name of the chart. Remaining numeric columns are displayed as values in the chart. Each row is displayed in a different pie.
Pie chart	Only numeric data is displayed. Non-numeric data is ignored. The first column of data is displayed as the name of the chart. Remaining numeric columns are displayed as values in the chart. Only the values in the first row are displayed in the pie chart.
Ring chart	Only numeric data is displayed. Non-numeric data is ignored. The first column of data is always displayed. Remaining numeric columns are displayed as values in the chart. Only the values in the first row are displayed in the ring chart.

See [Configuring the portlet](#), [Defining the portlet data preferences](#), and [About the DBAdapter](#).

## About the Time Frame portlet

The Time Frame portlet lets you decide the period of time that you want to analyze. The time frame you select, affects the time frame used by all portlets displayed on the same page.

 If you set up a different page to view additional portlets, it is recommended that you add the Time Frame portlet to the new page, and verify that you set it to the period of time that you want to display information on. If you don't add a Time Frame portlet to the page, the portlets on the page that are associated with the Time Frame portlet will automatically display information according to the data collected within the last 24 hours. This is also the default setting for all new time frames.

 If you delete a Time Frame portlet from a page, the portlets on the page will continue to display information according to the last settings you configured in the Time Frame portlet.


You can either choose to define the time interval that you want to analyze, or to focus your analysis on the last <n> minutes, hours, days, weeks or months, relative to your own local time. The following table describes the time frame settings you can select.

**Table 3-9** Time Frame options


Field	Description
From	Determines when the sampling period begins (date and time).
To	Determines when the sampling period ends (date and time).
Last	Lets you focus on the last <n> minutes, hours, days, weeks or months from the current time.

## Configuring the portlet

You can determine the design of the portlet and the user permissions. To configure the portlet configuration

1. In the desired portlet, click the Options icon (.
2. From the drop-down menu, select the Look and Feel icon.
3. In the dialog box that appears, move between the tabs to determine the portlet layout.
4. To save changes, click **Save**.  
To revert to the default settings, click **Reset**.

To define the portlet's user permissions


1. In the desired portlet, click the Options icon (.
2. From the drop-down menu, select the Configuration icon.
3. In the dialog box that appears, use the Permissions tab to edit the user permissions.
4. To save changes, click **Submit**.

## Defining the portlet data preferences

You can determine which information to display in a portlet and in what format you want it to be displayed (such as a table, chart or gauge).

You can determine what information is displayed in a portlet and the portlet's width and height.

To define the portlet's preferences

1. In the Title area of the portlet, click on the existing title and rename it to a title that helps you remember what is displayed in the portlet.
2. Click the Preferences icon () to edit the portlet preferences.
3. Under Show fields, choose the information that you want to display in the portlet.
4. Under Filter data by, determine which information to display. Depending upon the Precise installation/data source selected you may be prompted to enter additional information.  
If the Filter field supports the use of wildcard characters, use the percentage (%) character.
5. Under Properties, determine how you want the information displayed, as follows:

Field	Description
View data as	Determines whether data is displayed as a table or chart. If the data is of the same unit and type, it is displayed in the same chart.
Chart height	If you choose to display the data in a chart, determines the height of the chart, in pixels.
Position legend	If you choose to display the data in a chart, determines where to position the legend (options include top, bottom, left, or right of the chart).
Portlet height	Determines the height of the portlet, in pixels.
Portlet width	Determines the width of the portlet, in pixels.  The width of the portlet is also influenced by the layout of the page the portlet is displayed on.
Free text	Allows you to enter text that is displayed at the top of the portlet. You can use this text to explain what the purpose of the portlet is, or give an overview of what is displayed in the portlet.

6. Click **OK**.

## Removing a portlet package from the Precise Custom Dashboard

The portlet package is saved as a compressed WAR file.

To remove a portlet package from the Precise Custom Portal

1. Delete the WAR file from the `<precise_root>\products\gui\website\webapps` folder.
2. Restart the Precise Custom Dashboard service and restart the browser.

## Where to go for more information

For more information on the administration portlets, check the *Liferay Portal 5 - Portal Administration Guide* in the Documentation section, in the Developer Zone, on the Liferay Website ([www.liferay.com](http://www.liferay.com)).

For the latest information on the Precise Custom Dashboard, see the [Precise Customer Support Portal](#).

