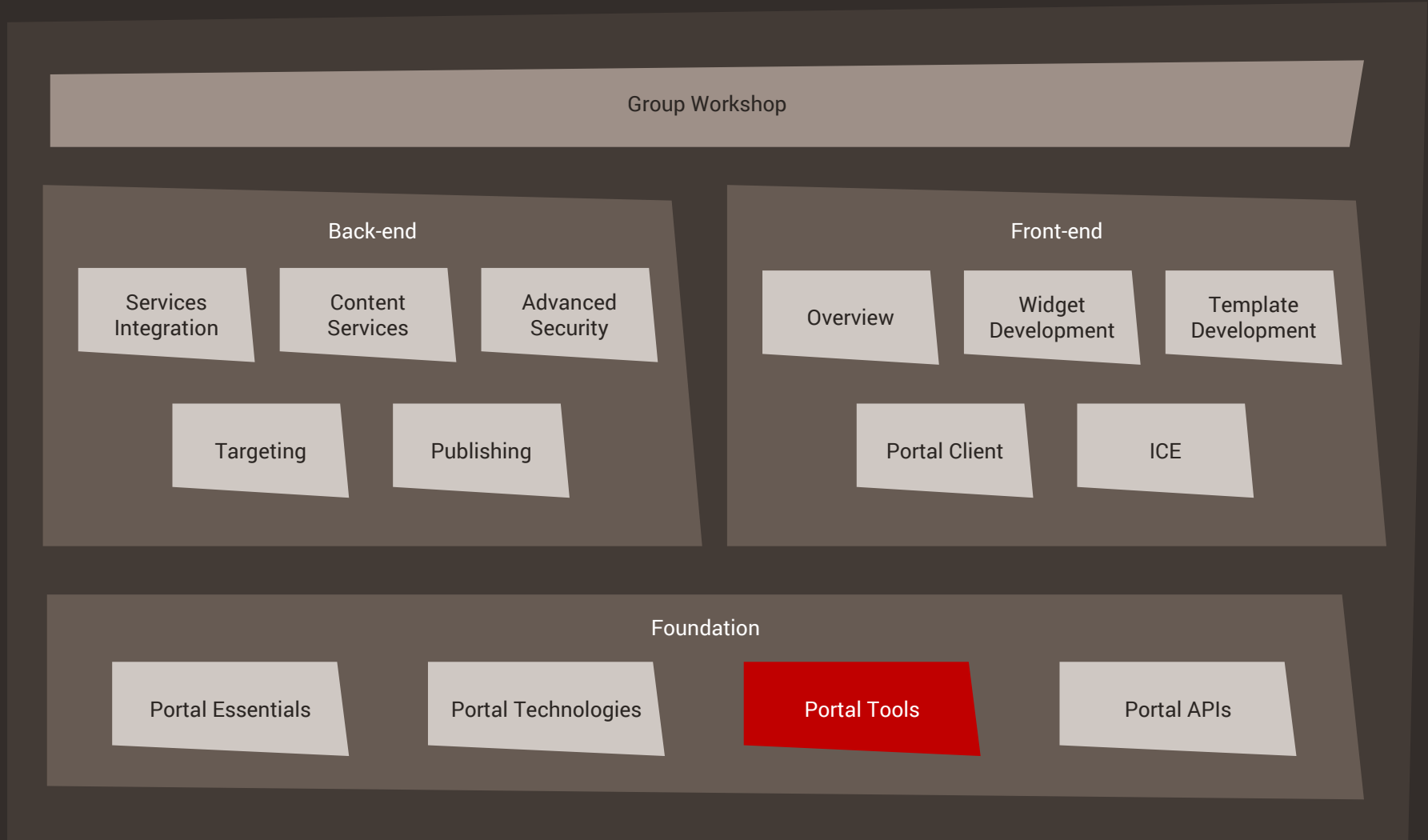


# Portal Tools

## Focus Area: Foundation





# 1. Become familiar with the CXP Manager

- Managing catalogs,
- Managing pages, layouts, and widgets
- Managing portal rights

# 2. Become familiar with the CXP Explorer

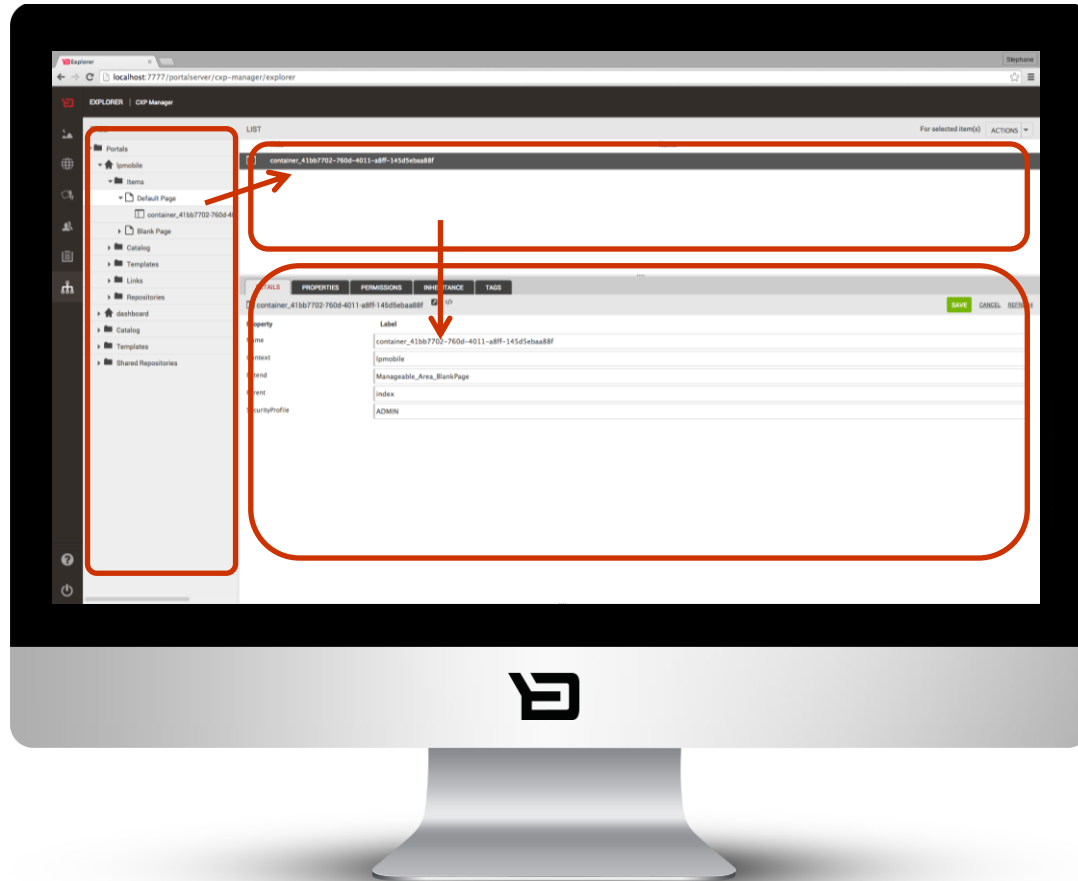
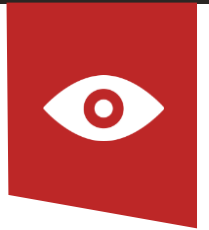
# 3. Import XML model configuration

# CXP Manager

Portal Tools



1. Create a portal, edit it's settings, permissions and special pages
2. Go to Pages, add a new page and base it on a master page. Edit it's permissions.
3. Add a container and some widgets to your page. Show the widget chrome and edit widget settings and permissions.
4. Preview the Page
5. Show the Portal Catalog



# The Import Tool

Portal Tools

- Auxiliary tool
- Import objects to the CXP database
- Populate the database with the portal structure specified in XML import files.
- Useful for starting a project or migrating to a new server.

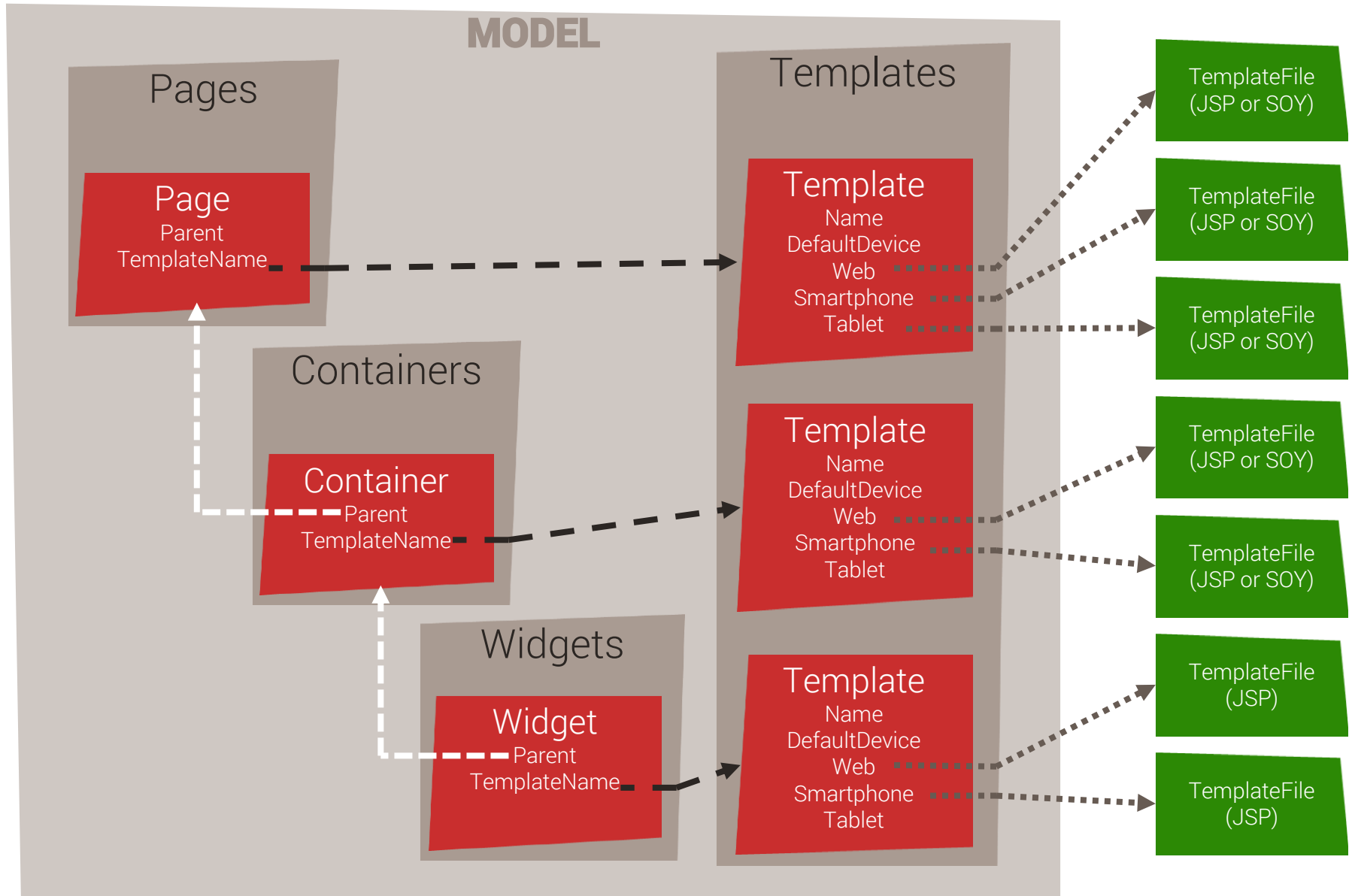


## Server Scope

1. Users
2. Groups
3. Templates
4. Masterpages (to enterprise catalog)
5. Containers (to enterprise catalog)
6. Widgets (to enterprise catalog)
7. Portals

## Portal Scope

1. Portal catalog
2. Pages
3. Containers
4. Widgets
5. Links



```
<backbaseArchiveDescriptor>
  <description>Backbase Archive</description>
  <includesContent>>false</includesContent>
  <packageId>Portal-hello-portal-3b9d6d3a-8d67-4f46-8a8d-
82cdcce64213</packageId>
  <versionId>5.6.0</versionId>
  <bbexport>

<order>bundleId,bundleName,portals,masterPages,portalContainers,portalWidgets,pa
ges,containers,widgets,portalRights,links</order>
  </bbexport>
</backbaseArchiveDescriptor>
```

```
<portals>
  <portal>
    <contextItemName>[BBHOST]</contextItemName>
    <name>hello-portal</name>
    <properties>
      <property name="DefaultDevice">
        <value type="string">mixed</value>
      </property>
      <property name="DefaultLandingPage">
        <value type="string">hello-portal/index</value>
      </property>
      <property name="TargetedDevice">
        <value type="string">mixed</value>
      </property>
      <property name="publishChains">
        <value type="string">Self - Direct</value>
      </property>
      <property name="title">
        <value type="string">Hello Portal</value>
      </property>
    </properties>
  </portal>
</portals>
```

```
<pages>
  <page>
    <contextItemName>hello-portal</contextItemName>
    <extendedItemName>BlankPage</extendedItemName>
    <name>index</name>
    <parentItemName>hello-portal</parentItemName>
    <properties>
      <property name="behaviors">
        <value type="string">be.perspective.Manager
be.portalClientExt.PortalManagerPreferencesForm</value>
      </property>
      <property name="bundleName">
        <value type="string">dashboard</value>
      </property>
      <property name="client-template">
        <value type="string">page</value>
      </property>
      <property name="title">
        <value type="string">Default Page</value>
      </property>
    </properties>
    <uuid>586a0418-b4b7-41e6-af22-d0ccdf304b91</uuid>
  </page>
</pages>
```

```
<containers>
  <container>
    <contextItemName>hello-portal</contextItemName>
    <extendedItemName>Manageable_Area_Closure-7368236</extendedItemName>
    <name>container_29927af7-17f6-44ba-b7c9-da2bf0273339</name>
    <parentItemName>page_1440584616905</parentItemName>
    <properties></properties>
  </container>
</containers>
```

```
<widgets>
  <widget>
    <contextItemName>hello-portal</contextItemName>
    <extendedItemName>hello-world</extendedItemName>
    <name>hello-world-3940964</name>
    <parentItemName>page-layout-container-2968183</parentItemName>
    <properties>
      <property name="area">
        <value type="string">2</value>
      </property>
      <property name="order">
        <value type="double">0.0</value>
      </property>
    </properties>
  </widget>
</widgets>
```

```
<portalPages>
  <page>
    <contextItemName>hello-portal</contextItemName>
    <extendedItemName>BlankPage</extendedItemName>
    <manageable>true</manageable>
    <name>BlankPage</name>
    <properties>
      <property name="behaviors">
        <value type="string">be.perspective.Manager
be.portalClientExt.PortalManagerPreferencesForm</value>
      </property>
      <property name="bundleName">
        <value type="string">dashboard</value>
      </property>
      <property name="client-template">
        <value type="string">page</value>
      </property>
      <property name="title">
        <value type="string">Blank Page</value>
      </property>
    </properties>
    <uuid>2e3664b4-14a2-4ca4-b1c5-dd6b327ae375</uuid>
  </page>
</portalPages>
```



```
<links>
  <link>
    <contextItemName>hello-portal</contextItemName>
    <finalUrl>hello-portal/main</finalUrl>
    <name>navroot_mainmenu</name>
    <parentItemName>hello-portal</parentItemName>
    <properties>
      <property name="TemplateName">
        <value type="String">link-default</value>
      </property>
      <property name="generatedUrl">
        <value type="string">hello-portal/main</value>
      </property>
      <property name="title">
        <value type="string">Main Navigation</value>
      </property>
    </properties>
  </link>
  <link>
    <contextItemName>hello-portal</contextItemName>
    <finalUrl>hello-portal/index</finalUrl>
    <name>link_navrootMainMenu</name>
    <parentItemName>navroot_mainmenu</parentItemName>
    <properties>
      <property name="ItemRef">
        <value type="uuidRef">586a0418-b4b7-41e6-af22-d0ccdf304b91</value>
      </property>
      <property name="TemplateName">
        <value type="String">link-default</value>
      </property>
      <property name="title">
        <value type="string">Default Page</value>
      </property>
    </properties>
  </link>
</links>
```

# BB-CLI

Discovering our command line interface

BB-CLI is our **command line interface**, allowing you to automate and simplify your daily workflow by providing you with convenience methods, such as:

- Scaffolding widgets and containers
- Installing portal archetypes
- Importing / exporting portals
- Communicating with the REST API
- And much more...



Follow this how-to guide to learn how to install and use our CLI tool, “BB-CLI”:

<https://my.backbase.com/resources/how-to-guides/bb-cli-the-one-cli-to-rule-them-all>



Follow the “Creating Your First Portal with BB-CLI” Tutorial, and import your own portal model

<https://my.backbase.com/resources/how-to-guides/creating-your-first-portal-with-bb-cli/>

# Exporting and Importing Portals

Portal Tools

- Portals can be exported from one CXP environment and imported into another.
- What is exported?
  - The entire portal structure (e.g. pages, containers, widgets, external links, headers, aliases, etc...)
- What is not exported?
  - JSP/SOY templates, widget chrome templates, widget definitions, JavaScript, and CSS files

## Three interfaces of the Import Export Tool

1. CXP Manager
2. REST Interface
3. BB-CLI



- Portal XML Models:
  - Object model
  - Portal model, including it's children (pages, containers, widgets, links, and tags) and the Portal catalog
  - Portal catalog items which extend the Enterprise catalog
  - User rights — detailed list of rights granted for each object property per group of users
- Assets (optional)
  - Content items used in pages

- Portal XML Model Only
  - Via BB-CLI, the REST API or CXP Manager
- Portal XML Model with Assets
  - Via BB-CLI, the REST API or CXP Manager
  - CXP zip archive:
    - metadata.xml – XML file containing information about the generated archive
    - portalserver.xml – XML file with the portal model
    - contentservices.zip – a zip archive with all Content Services assets used in the portal

- Relies on Orchestrator
- Export:
  - From the Dashboard select the Portal that you wish to export.
  - On the Settings tab click on Export
  - In the Export Portal pop-up, select if you want to export Content and Groups.
  - Click Export
- Import:
  - Click Import Portal, on the main Dashboard screen.
  - Select the portal archive to import
  - Click Import

- BB-CLI

- An account with the admin role is needed.
- Run the **bb export** command, and choose which portal you want to export to obtain the xml file:

```
$ bb export
? Choose the portal to target: (Use arrow keys)
▢ training-portal
  retail-banking
  dashboard

? Choose the portal to target: training-portal
✓ Writing to training-portal.xml. Done.
```

- REST interface

- Make an authenticated GET call on the following URL

[http://host:port/applicationcontext/export/portal?portalName=portal\\_name](http://host:port/applicationcontext/export/portal?portalName=portal_name)

- BB-CLI

- An account with the `admin` role is needed.
- Run the following:

```
bb import --target training-portal.xml  
✓ Importing training-portal.xml. Done.
```

- REST interface

- Set the content type header: `Content-Type=application/xml`
- Make an authenticated POST call on the following URL:

`http://hostname:port/applicationcontext/import/files/portal`


# Exporting and Importing Components

Portal Tools

- The importing/exporting tool allows the hot-deployment of custom components: widgets and containers
- Requirements:
  - Appropriate storage profile for imported components – chose between the file system and Content Services
  - Self contained components – all it's resources are contained in the parent folder of it's index.html (widgets) or config.xml (containers). Resources in this location are automatically included in the resources bundle when exported.
  - A running Orchestrator
  - All relevant Import/export, Orchestrator and Content Services properties need to be configured.
- Possibilities:
  - Exporting - Via CXP Manager
  - Importing - Via CXP Manager and BB-CLI

- A component archive is a zip archive generated by the import/export tool which includes the component definition and its resource files.
- The structure of the generated zip is similar to the folder structure of a regular Launchpad widget.



- In CXP Manager: simply click on the  button in the top left corner of the Enterprise Catalog, and drag & drop your zip file on the draggable area
- With BB-CLI: use **bb import-item** at the root of the widget folder to generate the zip file and upload it to the Catalog

```
$ bb import-item
Reading model.xml...
Reading bower.json...
Creating zip...
✓ Importing my-first-widget v0.1.0 from ./ . Done.
```

1. CXP Manager is ideal for Business Users
2. CXP Explorer, easier for technical users to work with the Portal
3. Use the importing tool to define a base setup

# Thank you!

[www.backbase.com](http://www.backbase.com)  
[sales-eu@backbase.com](mailto:sales-eu@backbase.com)

New York: +1 646 478 7538  
Amsterdam: +31 20 465 8888