

CA UIM

Customer Portals with Sites in UMP

CA Services

Document Title	Customer Portals with Sites in UMP
Project	CA UIM Implementation
Last Saved Date	13-Jun-2018
Version	1.0

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Change History

Date	Version	Author	Description of Change
1-11-2015	1.0	Rowan Collis	Initial Version

Abstract

The purpose of this document is to detail the steps to deploy customized end-user experiences within CA UIM UMP, specifically:

- a) admin-specified Read-Only Portal Views (defined as a particular set of public and private pages and Portlets in a Site)
- b) Creation of 3 levels of Users- All site admin, single site/account admin, site user
- c) look and feel (skinning) of the portal/Site via CSS, and
- d) removing Public and Private pages and Control Panel for read only “Operator” users that does not have the “Power User” role or Administrator” Role

Please note that this is one way to build Customer Portals but it is not the only way and therefore if the reader is experienced enough with Liferay and Nimsoft, variations can be just as successful. The intentions for this document is to give a start to new users so that a working solution can be easily and quickly built.

Note: CA UIM UMP is built upon Liferay Portal technology (v6.1), and the Liferay forums and documentation are invaluable when making deep customizations within this technology.

Nimsoft Users and Liferay Roles.

UIM users are either Account contacts, UIM users or maybe LDAP users. Whichever method was used to create the user, they will have a UIM ACL associated with them. This will determine which Liferay Role will be assigned to the user when it is created in UMP on first login.

Three main Liferay Roles are used in conjunction with UMP:

- **Administrator Role** - This has full access with Pages, Portlets and all Sites and Users. Full Liferay Control Panel access. This Role will only be assigned if the Nimsoft User has an ACL with the “Portal Administration” permission checked.
- **Power User Role** – Provides Public/Private Pages – these are the users own area (personal Site) where they can build their own menus which everyone can see –Public or only they can see – Private Pages. Limited Control Panel access – own sites and pages. A fresh install of UMP will have this Role in the Default User Association so that new users receive this Role when created automatically when the user logs in. It is the recommendation of this document to remove this Role from the Default User Association (see below)
- **User Role** – No Public/Private Pages. No Control Panel access (removed as part of this documents recommended setup). No access to change menus or pages. This Role is defined in the Default User Association so that new users gain this Role by default.

It is recommended that the Administrator and Power User Roles are used by the MSP and the User Roles are used by the MSP customer logins. In an Enterprise deployment there might not be the need for 3 levels for Role Access but it is available if needed.

Note: In previous versions, the Read Only Theme could be used by the Community to lock down the user access. This document recommends this isn't used as the Roles provide the same capability.

Suggested Users:

Administrator - Access for all Sites and all Users, Pages, Control Panel and has Public/Private Pages

Roles: Administrator, Power User

Customer Site Admin – Access to Member Sites and Member Sites Users and has Public/Private Pages. Control Panel is limited to Member Sites

Roles: Power User

Customer Site User/Operator - Read only access with no control panel or Public/Private pages, only see the Sites that the user is a Member.

Roles: User

Note: User access from a Nimsoft Capability perspective is still controlled with Nimsoft ACL's and the purpose of these Roles is to control the Liferay permissions and display features.

Default User Associations

When UMP is freshly installed, the Default User Associations are defined with the following Roles:

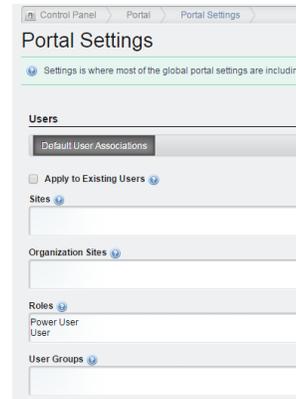
- Power User
- User

This might not be desirable because it means any new users will get the permissions to create their own pages and Portlets, through Public/Private Pages. Also it gives them access to the Liferay Control Panel which is not normally needed for users of UMP. It is the recommendation of this document to remove the Power User Role so that, if required, it can be added to the User by the administrators.

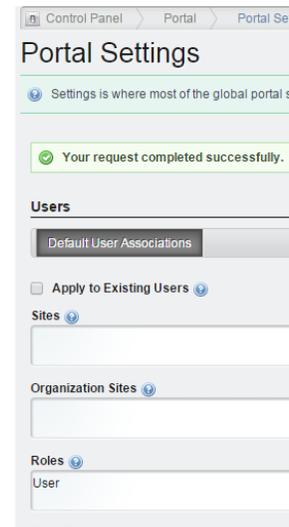
Once UMP is installed, the initial administrators/power users have been added, further users are likely to be operators or read only users and therefore the automatic creation of users' needs to be locked down.

To remove the Power User Role from default new users:

1. Logon as Administrator and Navigate to Control Panel
2. Select Portal Settings (left hand pane)
3. Select Users (right hand pane)



4. Remove the Power User Role and Save



The User Role

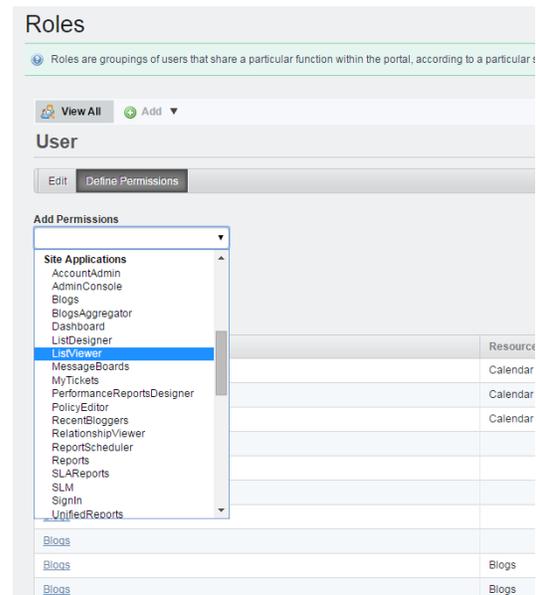
Now that we have removed the Power User Role from the default associations, when a new user (who does not have the Portal Administration ACL permission) logs into UMP, they do not have any access to add Portlets or Pages, they have very limited control panel access and their own public and private pages. It is the recommendation of this document that the base level User Role should have read only access to Portlets defined by a Site and nothing else. This provides a true locked down user role.

In order to create this locked down User role, portlet access must be granted and control panel access removed. In addition, public/private pages should be removed, as they are a distraction from the focus of this role.

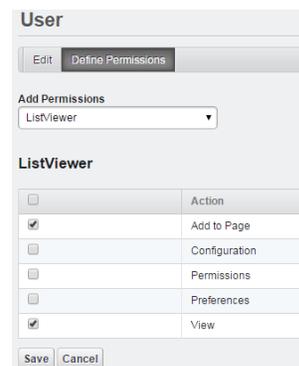
Grant Portlet access

Perform the following actions to give the User Role access to the USM, PRD, List View, Unified Reports Portlets:

1. Logon to UMP as Administrator and navigate to Control Panel
2. Click Roles
3. Actions/Define Permissions on User
4. Add Permissions dropdown
5. go to Site Applications/List viewer



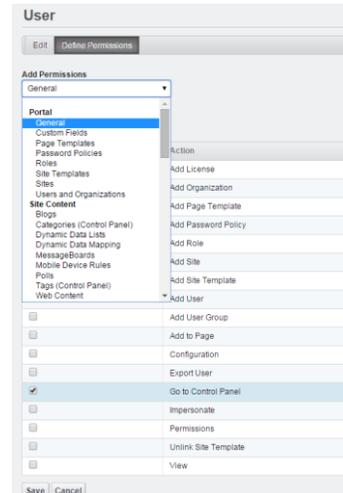
6. Check View and save
7. Repeat for List designer (if required), USM, PRD and Unified Reports



Remove Control Panel – User Role

Perform the following actions to remove the Control Panel from the User Role. The reason for this is to limit the options to edit for the Operators

1. Logon to UMP as Administrator and navigate to Control Panel
2. Click Roles
3. Role User
4. Actions/Define Permissions
5. “Add Permissions” dropdown
6. General
7. Uncheck “Go to Control Panel”
8. Save



The Power User Role

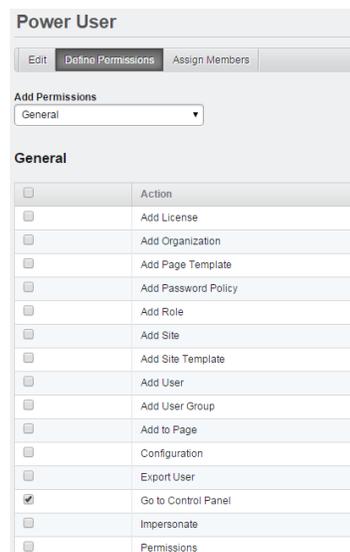
This Role has the effect of enabling Public and Private Pages, which are usually given to administrator users. Public and Private Pages are just the users own personal Site where they can add pages and Portlets.

Note: the Public Pages, as the name suggests are open to any UMP user (as long as their ACL permits them).

Add Control Panel – Power User Role

Perform the following actions to add the Control Panel to the Power User Role. The reason for this is to give the option to edit the Pages from within Liferay. Only personal Site and Sites that this user has access to will be available to edit.

1. Logon to UMP as Administrator and navigate to Control Panel
2. Click Roles
3. Role Power User
4. Actions/Define Permissions
5. “Add Permissions” dropdown
6. General
7. Check “Go to Control Panel”
8. Save



The screenshot shows the 'Power User' role configuration interface. At the top, there are tabs for 'Edit', 'Define Permissions' (which is selected), and 'Assign Members'. Below the tabs, there is a section for 'Add Permissions' with a dropdown menu set to 'General'. Underneath, a table lists various actions with checkboxes. The 'Go to Control Panel' action is checked.

<input type="checkbox"/>	Action
<input type="checkbox"/>	Add License
<input type="checkbox"/>	Add Organization
<input type="checkbox"/>	Add Page Template
<input type="checkbox"/>	Add Password Policy
<input type="checkbox"/>	Add Role
<input type="checkbox"/>	Add Site
<input type="checkbox"/>	Add Site Template
<input type="checkbox"/>	Add User
<input type="checkbox"/>	Add User Group
<input type="checkbox"/>	Add to Page
<input type="checkbox"/>	Configuration
<input type="checkbox"/>	Export User
<input checked="" type="checkbox"/>	Go to Control Panel
<input type="checkbox"/>	Impersonate
<input type="checkbox"/>	Permissions

Remove Public/Private Pages - Users

Perform the following actions to remove the Public and Private Pages for Users, except for the Power User Role which gets the My Private Pages only.

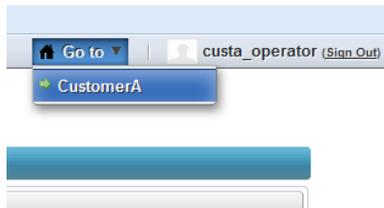
1. RDP or ssh to (all) UMP servers
2. Make the following additions to the portal-ext.properties file, located here:

```
<Nimsoft Dir>\probes\service\wasp\webapps\ROOT\WEB-INF\classes
##### Added by CA Services #####
#Limit my private pages to ONLY users with Power User role
layout.user.private.layouts.power.user.required=true
#disable public pages for all users (including power users)
layout.user.public.layouts.enabled=false
#####
```

[There is an alternative setup, which some customers may prefer. If you want admin users to have My Public Pages then the following maybe used instead.

```
##### Added by CA Services #####
#Limit my public/private pages to ONLY users with Power User role
layout.user.private.layouts.power.user.required=true
layout.user.public.layouts.power.user.required=true
#####
]
```

After this change has been made, a user who is no longer a member of the Power User group, and who has been assigned to a Site will see a view like this one from the “Go to” Menu:



Review Roles and Users

Logon with three users, setup with the following Roles and review access:

UIM user	Liferay Roles	Control Panel	Public Pages	Private Pages	Add/Manage
MSP_Admin	Administrator Role Power User Role	Yes - full	No	Yes	Yes
Customer_Admin	Power User Role	Yes - limited	No	Yes	Yes
Customer_Operator	User Role	No	No	No	No

Creating a Portal View (Site)

The first consideration is what pages and portlets do you want to deploy to end users? Typically, in an MSP deployment, for instance, the administrator will want to limit the amount of options that an end user has. This usually results in fewer calls to the help desk with questions how to use the portal. With that respect, many customers create their end users' views with the following:

USM

Unified Dashboards

Reports

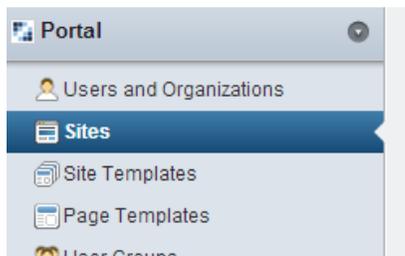
Change Password

Sites for Custom Views

In older versions of UMP Communities were used to create the Custom Views. Sites is the new name for Communities.

Create the new Site

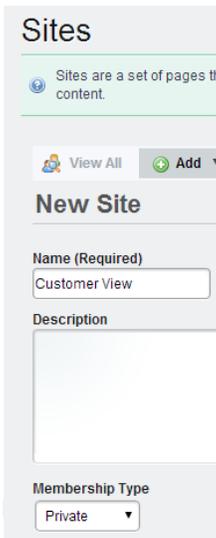
- 1) Logon to UMP as the Administrator
- 2) From the *Go to* menu, select *Control Panel*, then *Sites*



- 3) Click *Add > Blank Site*



- 4) Name the site (for example, "Customer View"), and choose type "Private" (so that only this user will see it for now -optional), then Save



5) Click *View All* to return to the Sites page

The Site can also be created as a Template which is then used by other Sites. Updates to the Template will be replicated to the Sites using this Template.

Membership Types:

Open: These Sites will appear in lists and Users can join (if they have permissions) or leave the Site, if they have the control panel.

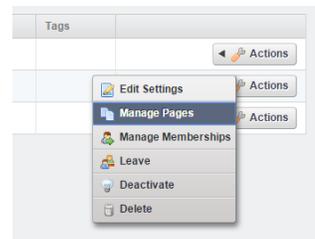
Restricted: If the Site User has control panel they cannot leave (or join) the Site. Site Power Users can leave the Site but cannot join without action from the site admin

Private: Sites do not appear in any public lists and only the owner will see and be able to administer.

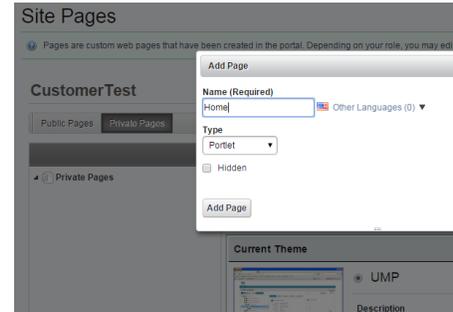
Create First Page

Once the Site is created, it will not be available to view until it has at least one page.

1. Logon as Administrator and go to Control Panel.
2. Select Sites
3. Actions/Manage Pages



4. **SELECT PRIVATE PAGES** (default landing is Public pages which is the login screen and not where the Pages are created)
5. Click Add Page
6. Enter Home as the first Page (or other name)
7. Click Add Page
8. Back to My Private Pages



Back in the Administrators Private Pages, select Go To and in your list will be the New Site. Select it and you will see the Home page on the menu which you can use the Add/Portlet/Monitoring to add the Unified Service Manager portlet to the Home page.

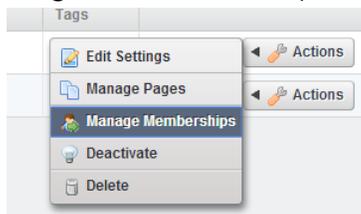
Editing the new Site

There are two ways you can edit the Site.

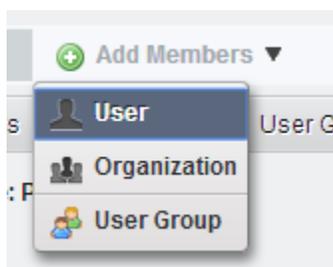
1. Using Control Panel – recommended for advanced options
2. Select Site (GOTO) and use Manage (top left) – recommended for general Menu/Portlet changes

Add Users to the new Site

- 1) Assign users to that site (*Actions > Manage Memberships*)

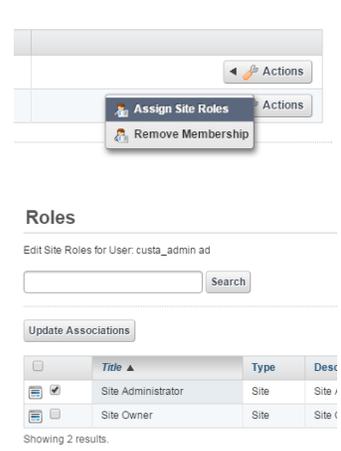


- 2) Click *Add Members > User*



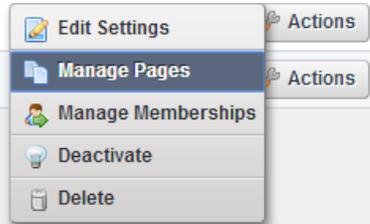
By default this will enable the users to view the Site but it is a locked down view, without the Add or Manage options on the toolbar. If the User needs to be able to edit the Site Menu's and Portlets, then when the Site Owner is adding the User within Site Membership, the following should be done:

1. Site View Members
2. Actions/Assign Site Roles
3. Check the Site Administrator
4. Update Associations

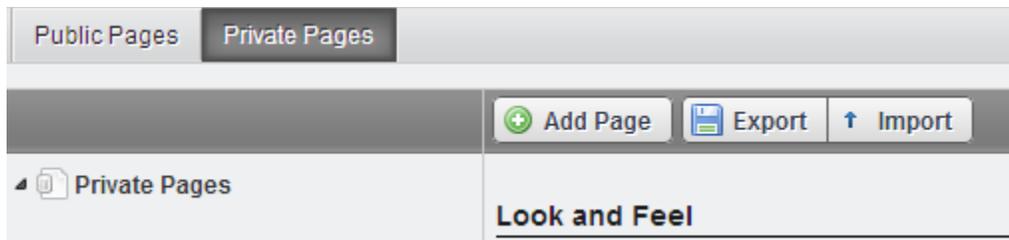


Export Site Pages

- 1) Return to the *Control Panel > Sites* tab
- 2) For the “CustomerA” site, go to *Actions > Manage Pages*



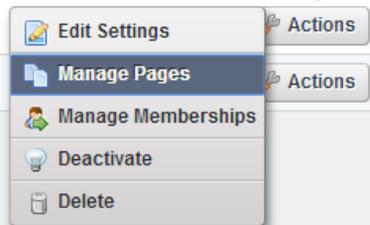
- 3) **IMPORTANT:** Click on the *Private Pages* tab, then click the *Export* button



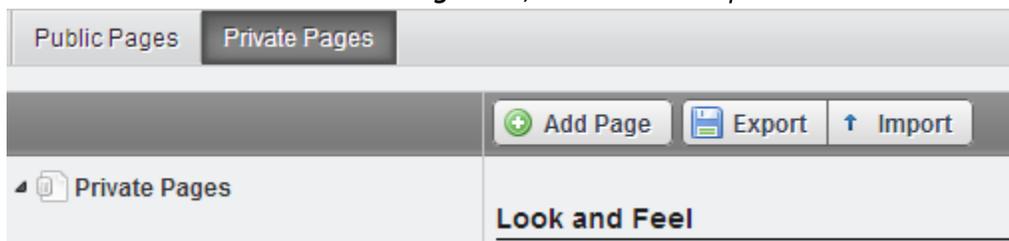
- 4) Save the LAR file (with a meaningful name)

Import Site Pages

- 1) Return to the *Control Panel > Sites* tab
- 2) For the “CustomerA” site, go to *Actions > Manage Pages*



- 3) **IMPORTANT:** Click on the *Private Pages* tab, then click the *Export* button



- 4) Select the saved LAR file from a previous export–Click Import

Changing the Default Menus for My Private Pages (personal site)

If you desire to change default Menu's for Users' My Private Pages (including CSS) then setup the Pages how you desire (maybe in a new dummy user to not interfere with your own setup) and export the lar file as above.

1. Copy this lar file to the following directory on the UMP host:
{Nimsoft Dir}\probes\service\wasp\webapps\ROOT\WEB-INF\classes
2. Make the following additions to the portal-ext.properties file, located on the UMP host:
{Nimsoft Dir}\probes\service\wasp\webapps\ROOT\WEB-INF\classes

Commenting out the default_user_private_nms.lar with a “#” and inserting a new entry

```
#default.user.private.layouts.lar=${catalina.home}/webapps/ROOT/WEB-INF/classes/default_user_private_nms.lar
##### Added by CA Services #####
default.user.private.layouts.lar=${catalina.home}/webapps/ROOT/WEB-INF/classes/<new_lar_file>.lar
##### Added by CA Services #####
```

3. Save portal_ext.properties file

Note: as soon as this file is saved, UMP will go down (affecting all users) and WASP probe will need to be restarted.

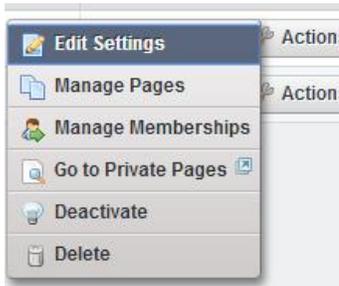
This change will need to be performed on all UMP servers in a multi instance setup.

All new users after this change has been made will be affected.

Sites and Virtual Hosts

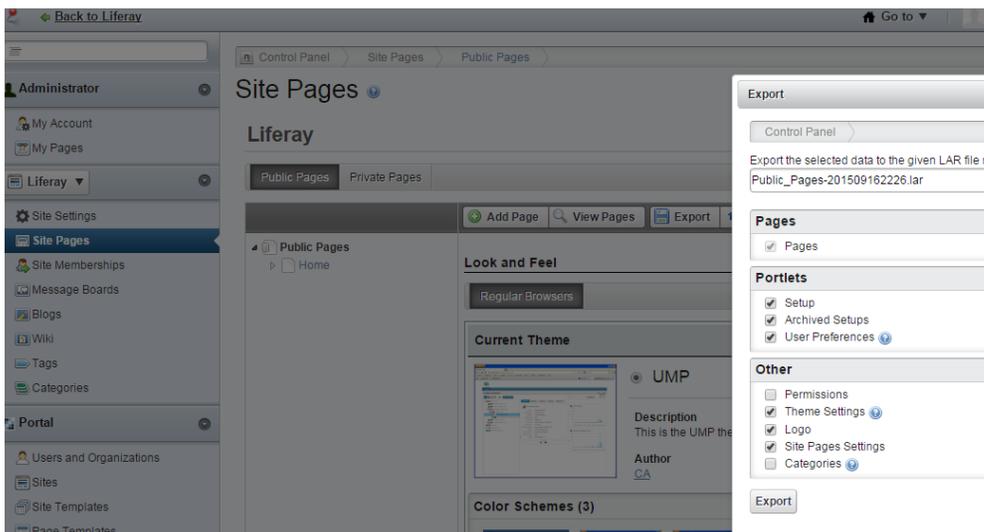
In a white-labeling environment, you can direct different customers to different custom URLs with a different look-and-feel for each site's public (login) and private (portal view) pages.

- 1) navigate to *Actions > Edit Settings* for that site

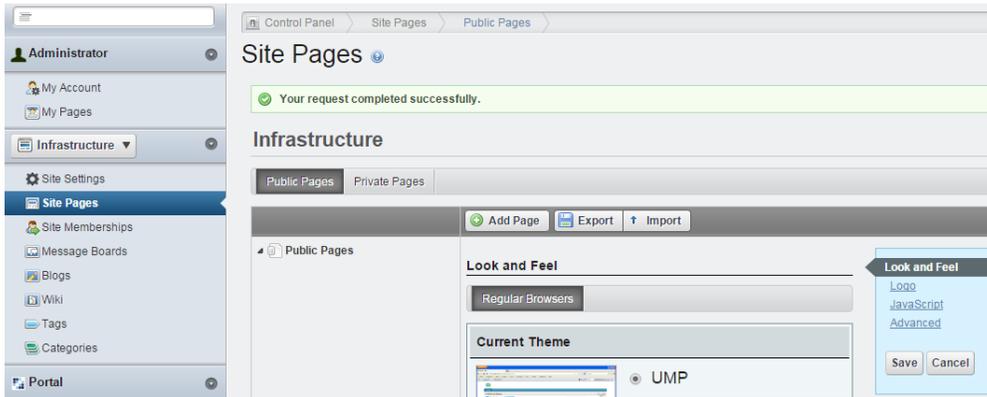


- 2) Click the *Site URL* tab.
- 3) In the Private Pages section, be sure and enter the *exact* same URL you will be using in DNS to which you will direct users. You only need to enter the virtual host in one field either the "Private Virtual Host" field or "Public Virtual Host" field.
- 4) If you use the Public Virtual Host then you need to setup a Home page in the public page of the site, with the login portlet.

The easiest way to do this is by exporting the Public Page from Liferay Site:



5) Import the lar file to the Customer Site Public Page:



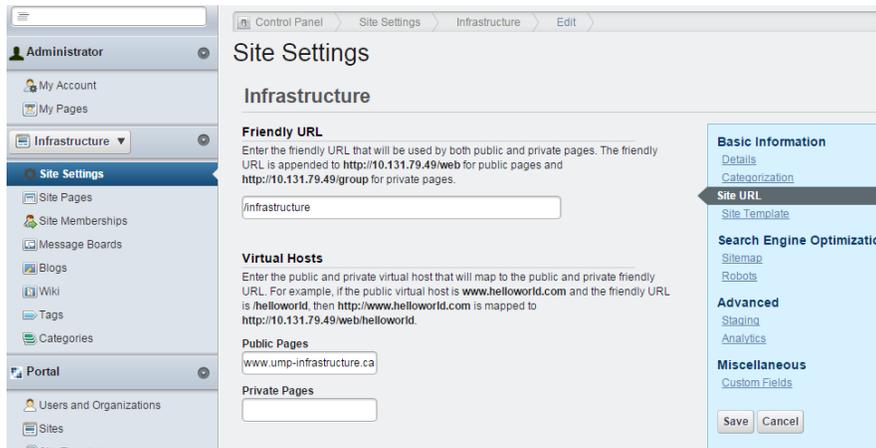
This enables you to customise the login screen specifically for the site user company.

Top tip : if you make this home page hidden then the menu bar is removed from the login screen (it doesn't really serve a purpose normally on the login page), making a cleaner look.

The small downside of this bespoke Customer login screen is the 'Goto' has the public login page as well as the private content page. This does not cause any issues as the screen just shows the logged on user.



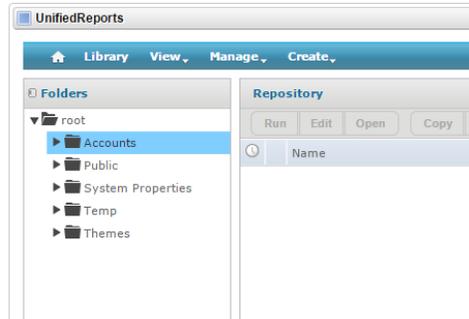
- 6) If you use the Private Virtual Host then it will use the Public Default Login screen and once logged in direct to the Site Private Pages



Unified Reporter – lock down for User Role

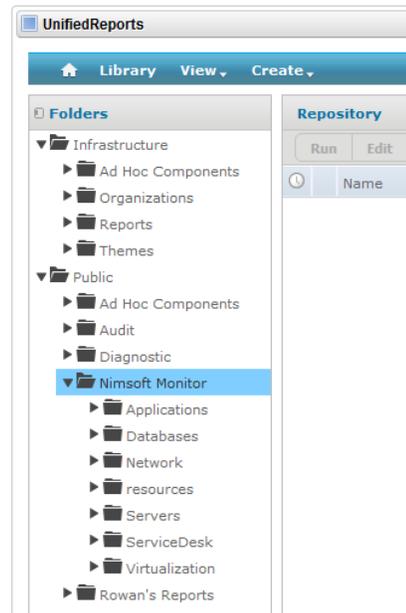
In a locked down environment, it is likely that the reports made available to the Operators will need to be controlled.

The Administrator user will have access to all folders showing the root folder, as right:



When an Account contact user logs in they will be presented with an Account folder and the Public folder. (The Account folder is created when the first contact, for that Account, logs in and opens the Unified Reporter portlet).

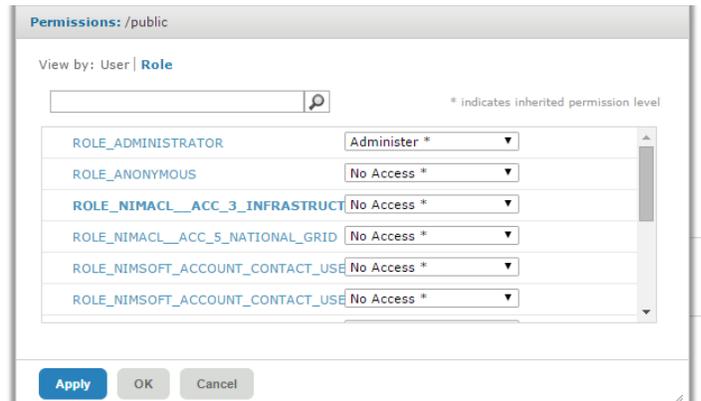
As right, you will see the “Infrastructure” Account folder and the “Public” folder.



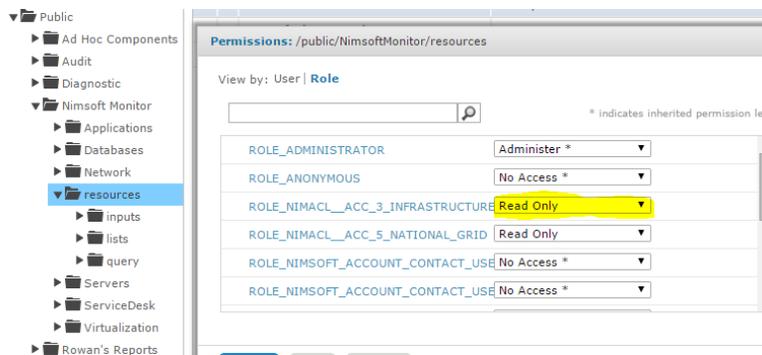
The Public folder removal:

Any reports from the Public folder can be copied to the Account folder using iReport

1. Logon as Administrator and open UR
2. Right click the Public folder and select permissions
3. Locate the Role for the account
(in the example it is Role_NimACL__ACC_3_Infrastructure)
4. Select "No Access" from the drop down and Apply



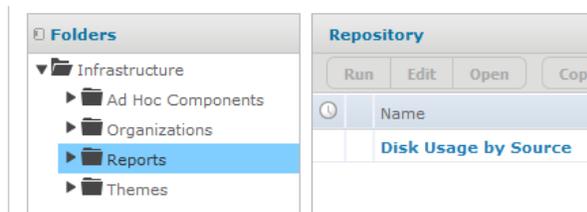
5. Drilldown to Public/Nimsoft Monitor/resources
6. Right click the resources folder and select permissions
7. Select "Read Only" for the Account Role and Apply



You will now be left with the following 3 folders:

- Ad Hoc Components
- Organizations
- Themes

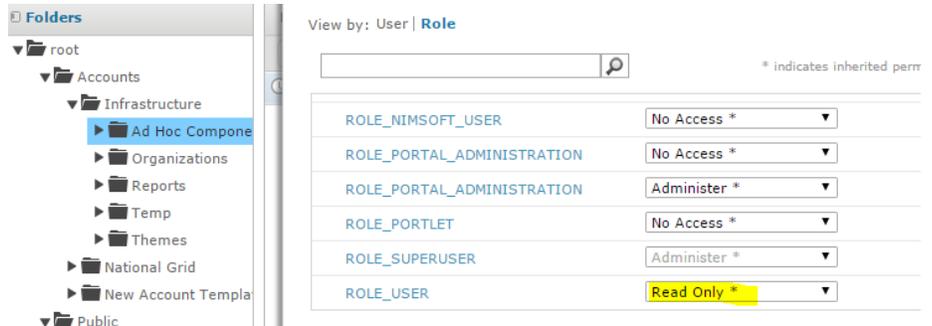
It is suggested that you create a folder for the customer reports, for example Reports...



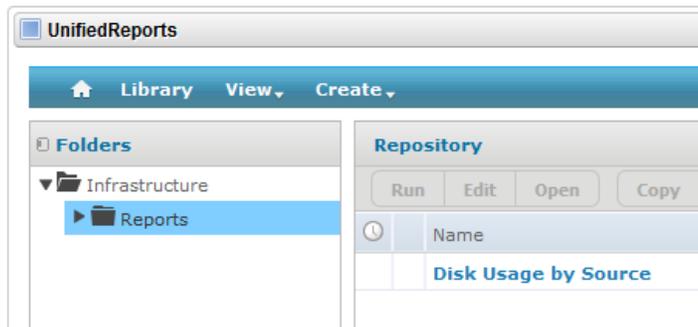
The Account sub folder removal:

The three folders can be removed by setting the permissions on the ROLE_USER role – the Account role already has “No Access”:

1. Logon as Administrator and open UR portlet
2. Navigate to the sub folder
3. Right click and select permissions
4. Locate the ROLE_USER
5. Change to “No Access”
6. Apply
7. Repeat for any other folder that are undesirable on the User Role.



The folder structure should now look like this

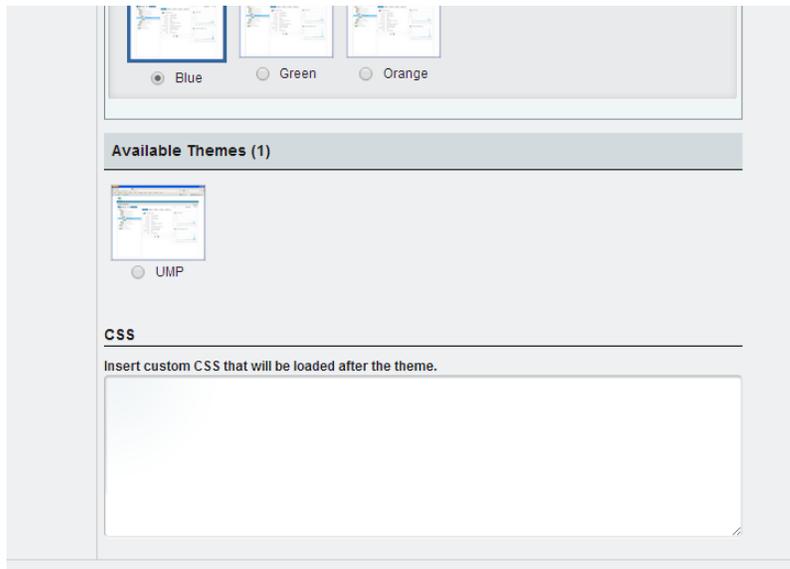


More “Reports” folders can be added using iReport but the system folders have been removed for the User Role.

Skinning a Site with CSS

Once you have created a site (with or without a Virtual host), you can “skin” that site’s pages with CSS, loaded after the theme. Note, in order to individually skin the public (login) page of a site, virtual hosts will be necessary. Without the use of virtual hosts, all users will be directed to the same public Default Login page (see below), and the skin will only display when that site’s private pages are loaded.

1. To skin the Public (login) page, navigate to *Control Panel > Sites > {site name} > Actions > Manage Pages > Public Pages > Look and Feel > CSS* section, and paste in your CSS code



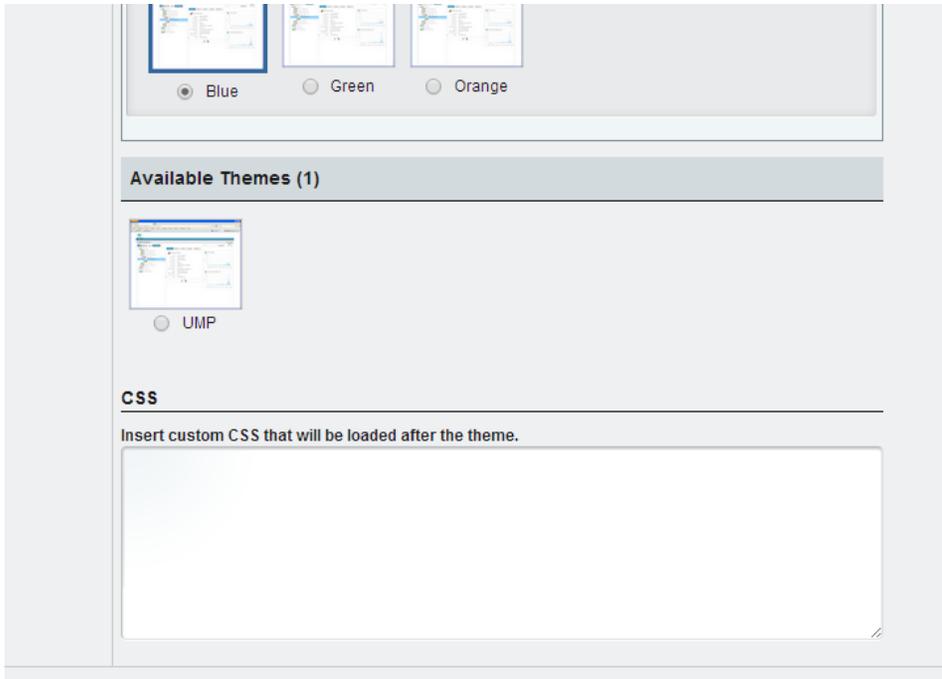
2. To skin the Private pages (login), navigate to *Control Panel > Sites > {site name} > Actions > Manage Pages > Private Pages > Look and Feel > CSS* section, and paste in your CSS code

You can test CSS out in your Personal Site Private Pages (My Private Pages) before deploying to the Site

Skin Default Login Screen (All Sites)

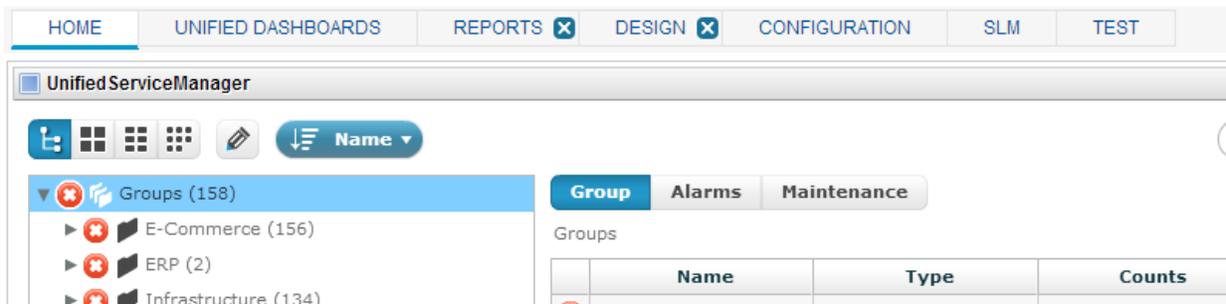
In order to skin the default Login screen with CSS and/or Logo perform the following

1. Login as Administrator
2. Type the url <http://<ump-host:port>/web/guest/home>
3. Navigate to Manage/Page
4. Click Public Pages
5. Insert CSS and save
6. And/or Select Logo in right pane and upload image file
7. Save



Note that any time a LAR file is imported into the Public or Private pages, the CSS will be lost and you will need to reinsert it into the Look and Feel > CSS section.

Here is an example from the “Sample CSS Code” included in later in this document:



Other Considerations

Portal Administration ACL in NMS

It is important to be judicious in the application of the “Portal Administration” ACL in NMS. Any NMS user with this ACL will automatically have the *Administrator* role in Liferay/UMP. The Administrator role in Liferay has **superuser** access to the entire Liferay portal. This means that any Read-Only (or any other) restrictions will not take effect, enabling that user to modify anything in the UMP. This is especially a concern when using Liferay sites because when a site page is added, subtracted, or modified, those modifications take effect immediately and apply to the entire site.

NOTE: Any administrative user MUST be assigned to the “Power Users” role in order to regain (Public and) Private pages.

Default View for all Customers

As an alternative to multiple Sites for each Customer, you can limit the amount of sites, for ease of administration by creating a “Default View” site that would apply to all customers, since the pages and Portlets you assign are all the same and the data presented will still adhere to “origin ownership.”

Unfortunately, there is no Liferay site connection/association with Nimsoft Accounts.

A Liferay site is only a template of the menu; the account and ACL dictate what is shown in the template.

If you created two different users in two different Accounts, then assigned them both to the same Site they would each have the same Site-based template, tabs etc, but the data shown in those portlets would be restricted to the Nimsoft Accounts to which they belong.

Sample CSS Code

```
#navigation {
background:none repeat-x scroll 0 0 #F7F6F6 !important;
}
#navigation a {
font-weight: normal;
color: #00529B;
text-transform: uppercase;
border: 1px solid #E3E3E3;
margin: 0 -2px;
padding: 3px 23px;
}
#navigation .selected a, #navigation a:hover, #navigation a:focus,
#navigation .lui-dd-dragging, .lfr-navigation-proxy {
background: none repeat scroll 0 0 #FFFFFF;
color: #00529B;
text-shadow: none;
border-bottom: 3px solid #009AC7;
}
#navigation .child-menu li a {
background: none repeat scroll 0 0 #FFFFFF;
color: #00529B;
text-shadow: none;
}
#navigation .child-menu li a:hover {
background: none repeat scroll 0 0 #009AC7 !important;
color: #ffffff;
}
.logo .current-site, #navigation, #navigation a, .portlet, .portlet-
topper, .site-breadcrumbs ul {
border-radius: 0px 0px 0px 0px;
}
#navigation li.selected a {
box-shadow: none;
}
#navigation .child-menu li a {
border-bottom: none;
}
}
```

More Sample CSS Code

The following CSS will present a UMP page with UIM web colours.

```
body {
background: #5cbcd6;
background-size: 1920px 1176px;
font-size:12px;
font-family: Muli, Arial, "MS Trebuchet", sans-serif;
}
#navigation {
background:none repeat-x scroll 0 0 transparent !important;
border-bottom:1px solid #808080;
height:29px;
position:relative;
text-transform: lowercase;
font-family: Muli, Arial, "MS Trebuchet", sans-serif;
}
#navigation li a {
font-size: 12px;
font-weight: normal;
text-decoration: none;
background: #575757;
color: white;
border-radius: 0 0 0 0;
}
#navigation li a:hover {
background-color: #547822;
color: white;
box-shadow: none;
text-shadow: none;
}
#navigation .selected a {
background-color: #547822;
color: white;
font-weight: bold;
box-shadow: none;
text-shadow: none;
}
#navigation .child-menu li a {
color: white ;
background-color: black;
box-shadow: none;
text-shadow: none;
position: relative;
```

```
border-radius: 0 0 0 0;
}
#navigation .child-menu li a:hover {
color: white;
background: #547822;
box-shadow: none;
text-shadow: none;
border-radius: 0 0 0 0;
}
```