Getting Started in the EPA Portal

Self-Service

November 14, 2007

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Forum Overview

❖ **Purpose**

- To provide an understanding of the purpose, role, and functionality of the EPA Portal and discuss how to get started creating communities for your organization

❖ **Agenda**

- What is the EPA Portal?
  - How is the EPA Portal Organized?
  - What are the Collaborative Tools?
- Self-Service Features
  - Creating Collaborative Teams
  - Creating New Communities
  - Creating New Portlets
- EPA Portal Next Steps
- Questions

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Imagine if you could...

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Utilize single sign-on to
access integrated data
and information across
the Agency

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Receive up-to-date
weather and news alerts

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Collaborate with your peers through online meetings and file sharing capabilities
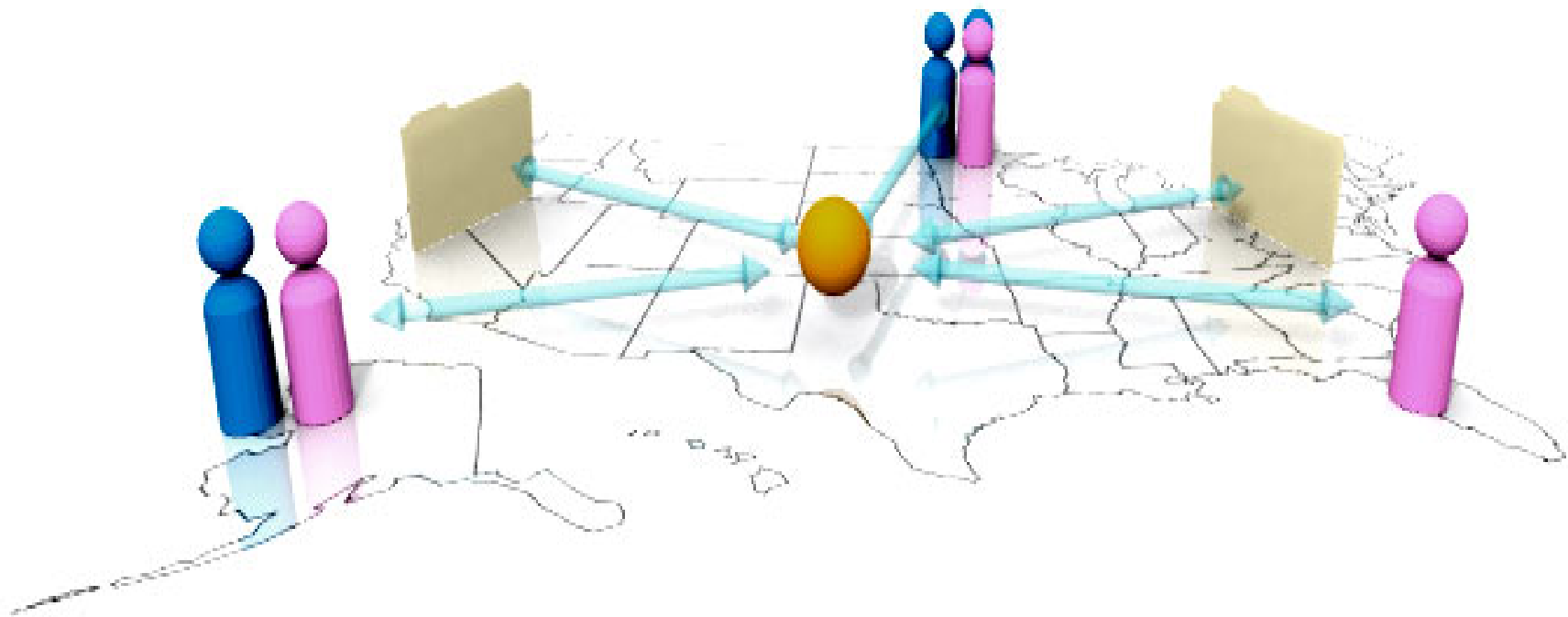
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What is the EPA Portal?

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EPA Portal Features

❖ The EPA Portal provides a gateway to EPA's information resources that:

- ✓ Facilitates real-time **collaboration** with internal and external peers to share ideas and knowledge

- ✓ **Organizes** resources to easily find data sources and analytical tools

- ✓ Allows Program Offices and Regions to **share** their solutions and knowledge with interested individuals

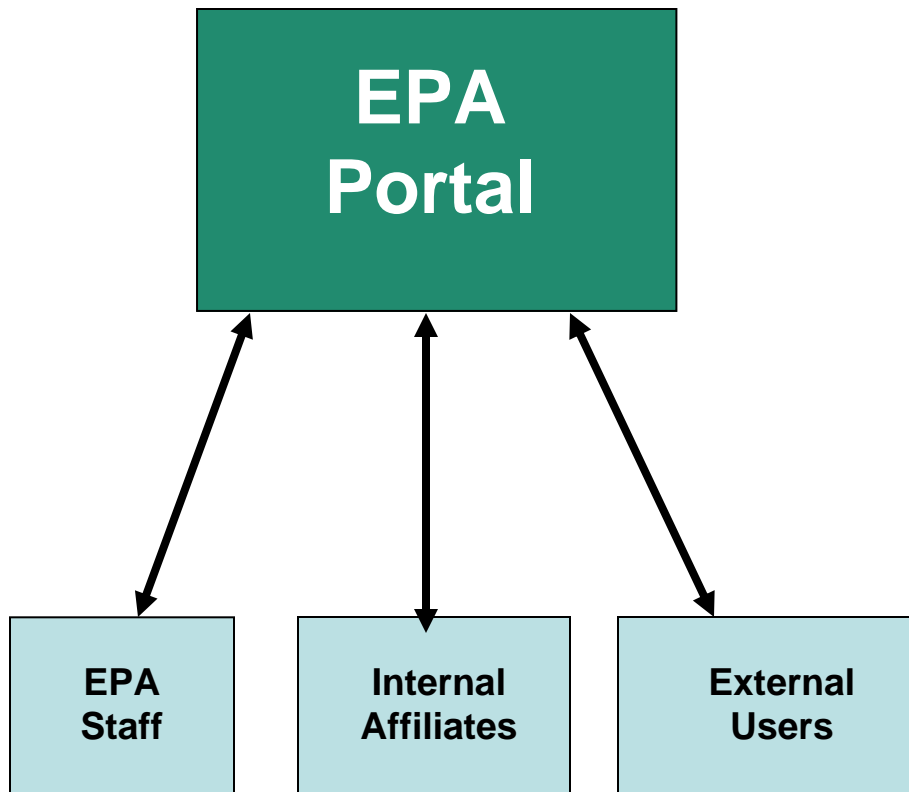- ✓ Allows you to **personalize** your Portal to your own needs, and preferences

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EPA Portal Features

✓ Enables communities of users with similar interests to **customize** pages, displaying the data and tools relevant to their business needs.

✓ Ensures **controlled**, **authorized access** to Portal content, systems and tools and provides for centralized management of user identities.

✓ Allows for **growth** and maturation as new requirements and opportunities to employ new tools are identified.

✓ Provides a **single web address** and standard interface for Agency business partners to trade information and conduct business with EPA.

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EPA Portal Users

EPA Portal

EPA Staff

Internal Affiliates

External Users

❖ **EPA Staff** – People who are hired by the EPA

❖ **Internal Affiliates** – On-site workers who are eligible for a "Smart Card"

❖ **External Users** – Anyone who works on behalf of EPA for compensation, but does not have an EPA email address or LAN account

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Managing Access

❖ Access to the EPA Portal is managed through the enterprise Identity and Access Management (IAM) solution

❖ IAM provides:

- Single Sign-on (SSO) for Web and client-server based applications
- Controlled access to information, based on groups and roles that are assigned to a user
- An enterprise identity store with single identity for each user that can be used to access multiple applications
- Improved security by de-provisioning (removing) users from multiple applications quickly

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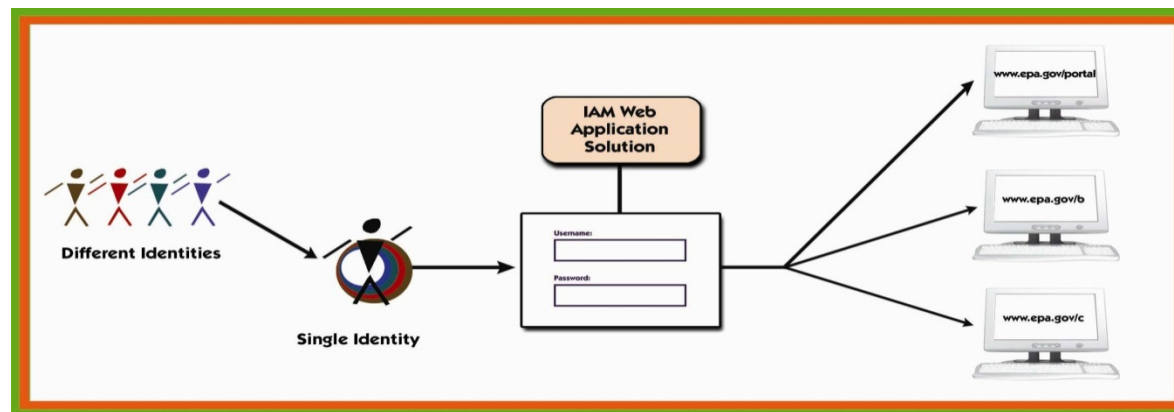
How is the EPA Portal Organized?

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Community Concept

❖ Allows for different groups to create their own "community" based on specific functions or interests

❖ Flexibility to present information in a way most logical and intuitive to that user base

❖ Examples include:

- Environmental Science Connector – a community of scientists and researchers

- Clean Watersheds Needs Survey – a community of Wastewater Facility Managers, State, and Federal Water Management Specialists

❖ Regulated access rights managed by the enterprise IAM solution

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Current Communities

❖ Eleven communities exist in the Portal today:
- Air Analysis
- Emergency Management
- Environmental Science Connector (ESC)
- Financial Management (e.g., DRA/DAA Reports)
- General Community
- Geospatial (Geodata Gateway, WMEII)
- ITGSS
- ITS ESE
- National Environmental Information Symposium
- Tribal Water Quality
- Work@Home

❖ Many more are planned!
- Emerging Leaders Network (ELN)
- Technical Community

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EPA Portal Communities and Partners

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What are Collaborative Tools?

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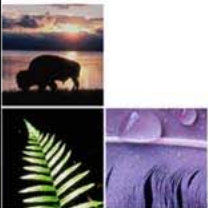
Collaborative Tools

❖ In addition to Communities, the EPA Portal also provides access to Oracle Collaboration Suite (OCS) which includes the following functions:

- **Workspaces**
  - A Workspace is a team-based tool designed to track and manage content and project communications

  - Through Workspaces users can:
    - Share and collaborate on documents, presentations and other files using a common team **Library**

    - Build Team Calendars using the **Meeting** Function

    - Assign and manage team projects and action items using the **Tasks** feature

    - Broadcast information that the entire team needs to know using the **Announcements** capability

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Collaborative Tools (Cont'd)

- **Web Conferencing**
  - Conduct live meetings or presentations with attendees in different geographical locations over the Internet

- **Instant Messaging**
  - Allow Portal users to send text messages to each other in a secure environment

❖ **How can you learn more about OCS?**
  - Speak with Terry Grady about registering for OCS Training

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Self-Service Features

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EPA Portal Self-Service

❖ Self-service refers to the ability for end users to expand the Portal to include their content without significant technical support

❖ There are three methods of adding content to the EPA Portal:

- Creation of Collaborative Teams
- Creation of New Communities
- Creation of New Portlets

❖ Each method requires different skills, making self-service more or less practical

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Creating Collaborative Teams

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Collaborative Teams

❖ A Collaborative Team is a group of users who have a need to share documents, hold discussions, conduct meetings, and work together to produce specific results

❖ Examples include:

- Data Sharing Community of Interest – a group of users from across EPA tasked to discuss data strategy, focusing on enabling data sharing across EPA IT systems

- IAM Docs – a community that facilitates the distribution of the latest documents related to Identity Management and Access Control Policy at EPA

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How to Create a Collaborative Team

❖ **Before you begin:**

- Only EPA Staff can create new collaborative teams

- Once created, any EPA Portal user can join and even be an administrator

- Collaborative Teams can be open or restricted, published or unpublished

- All teams start with 50 MB of disk space - if you need more, contact the Portal Team

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Process for Creating a Collaborative Team

1. Navigate to the Collaborative Workspaces Page of the EPA Portal
2. Click on the "New Workspace" button
3. Select a Basic Workspace Template
4. Complete the Workspace Properties Form
5. Enter the Workspace and set up your initial membership *(optional)*
6. Populate the workspace with any additional startup information required *(optional)*
7. Open the Workspace for non-administrative members *(if initially closed)*
8. Start using your new workspace

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Creating a Collaborative Team Demo

Demonstration

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Creating New Communities

Community Structure

❖ An EPA Portal Community is made up of one or more pages

❖ Each page can have tabbed subpages

❖ Each page/subpage contains one or more Portlets

❖ Portlets contain atomic functionality

- Access a system
- Run a report
- Display a map
- Offer a set of links

❖ Portlets can be shared across pages, subpages, and even communities

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How to Create a Community

❖ Before you begin:

- Only EPA Staff can create new communities
- Once created, any EPA Portal user can join
- Communities can be open or restricted
- Because communities change some shared elements of the Portal (e.g. the left navigation bar), you need to coordinate with the Portal Team before doing any of the following:
  - Creating a new community
  - Adding or removing pages to a community
  - Renaming a community
  - Removing a community

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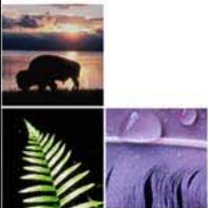
How to Create a Community (con't)

- You can only use existing Portlets in your community
    - Several hundred already exist
    - Many are customizable to meet your needs (e.g. Omni-Portlet, RSS Readers)
- New communities need to be created in the NCC Staging environment and deployed to production
- New Community Developers need to go through the Portal Developer's Bootcamp (2 day course) and sign a Rules of Conduct agreement

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Process for Creating a Community

1. Notify the Portal Team of your need for a new community and the expected timeframe
2. Obtain access to the Portal Staging Server (from the Portal Team)
3. Use the Portal Builder on the Staging Server to create a new page group
4. Create pages and subpages within the new page group
5. Select the Portlets you wish to display on each page from the Portlet Repository
6. Request that your pages be deployed to Production
7. Once pages are deployed, use the "Manage Access" tool to manage your community membership

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Edit   View   Favorites   Tools   Help

Sample Page   🏠 ▾ 🔊 ▾ 🖨 ▾ 📄 Page ▾ 🔧 Tools

Editing Views: **Graphical** | Layout | List   Mobile: Preview   View Page
Page Group: Properties   Page: Properties Style Access   Create: Sub-Pages
Path: *Test Page Group* > **Sample Page**   Go to Page   Builder   Navigator   Help

🔠 ▣↕ ✏ ⬆⬇⬅➡ ✖

📎

racle Application Server   Home   Help
Portal   **Sample Page**
                                                                              Edit   Customize   Account Info   Logout

                                                              ▲

🔠 ▣↕ ✏ ⬆⬇⬅➡ ✖ **My Portlets**   📑 🔠 ▣↕ ✏ ⬆⬇⬅➡ ✖ **My Items**

s region is empty. You can add Portlets to this region by clicking the Add Portlet icon above.   This region is empty. You can add Items to this region by clicking the Add Item icon above.

                                                              📑 🔠 ▣↕ ✏ ⬆⬇⬅➡ ✖ **My Items**

                                                              This region is empty. You can add Items to this region by clicking the Add Item icon above.

Add Portlets

OK   Cancel

Add Portlets To Region

Drill down to the appropriate provider, then click the portlet name to add the portlet to this region. If you are not sure of the location of the portlet in the Portlet Repository, use the Search field.

Available Portlets   Search HTML   Go   **Selected Portlets**

Portlet Repository Search Results
Portlet Repository

Results: Items 1 - 3 of 3

Form Input Portlet 🔍

Page: Basic Samples
This portlet shows how to post and process information from HTML forms.

HTML Portlet
Page: Portlet Builders
Create or edit content by entering HTML.

Dynamic Page Portlet
Page: Additional Portlet Builders
Create HTML with optional embedded SQL or PL/SQL

HTML Portlet

Main frameset for Add P

Edit   View   Favorites   Tools   Help

Edit HTML Portlet   🏠 ▼ 🔊 ▼ 🖨 ▼ 📄 Page ▼ ⚙ Tools

Home   Builder   Navigator

Edit HTML Portlet Default Content   ❓

Preview | Apply | OK | Cancel

Title and Content

Enter the default title and HTML content for the portlet.

Display Name   HTML Portlet

Display Portlet Header   ☑

Content
```
<Strong> Welcome to St Louis! </strong>

<h3> We're glad to have you </h3>
```

Preview | Apply | OK | Cancel

Edit   View   Favorites   Tools   Help

Sample Page

Page ▾   Tools

Page Group: Properties   Page: Properties Style Access   Create: Sub-Pages

Path: *Test Page Group* > **Sample Page**   Go to Page   Builder   Navigator   Help

racle Application Server
Portal

Sample Page

Home   Help

Edit   Customize   Account Info   Logout

My Portlets   **My Items**

This region is empty. You can add Items to this region by clicking the Add Item icon above.

HTML Portlet   Customize   **My Items**

Velcome to St Louis!   This region is empty. You can add Items to this region by clicking the Add Item icon above.

Ve're glad to have you

cle Application Server

Portal

Sample Page

ML Portlet

Customize

lcome to St Louis!

're glad to have you

Creating New Portlets

Portlet Development

❖ The EPA Portal allows users to create new Portlets when no existing Portlet meets the business need

❖ Portlets are Java 2 Enterprise Edition applications

- Leverage the Java programming language to provide greatest flexibility
- Support for all major technologies
- Require specialized J2EE coding skills to implement correctly
- Require code security reviews and audits by NCC prior to deployment

❖ Due to security and system stability issues, all new Portlet development must be coordinated via the Portal Team

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❖**Take Advantage of Training Opportunities**

- Identity and Access Management (IAM) for Developers
- Portal Development Training
- Oracle Collaboration Suite Training

❖**Join the Portal Developer's Community**

- Monthly Team Discussions on new technologies
- Access to sample code, developer documents, etc. on the Portal *(coming soon)*

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EPA Portal Next Steps

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EPA Portal Future Plans

- ❖ Continue to expand Communities within the EPA Portal and bring in new users

- ❖ Upgrade Portal Framework – Late 2007

- ❖ Release additional Portal Versions (next release tentatively planned for early January)

- ❖ Deliver additional training classes for Community Managers, developers, and users

- ❖ Develop additional partnerships in the EPA and with external stakeholders

- ❖ Extend Portal capabilities to enhance collaborative technologies and integration with additional features

- ❖ Provide greater self-service capabilities for those who wish to implement new content without external support

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Questions?

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