LAB: System i Access for Web

Using the Functions:

Customize

Homepage Configuration

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Lab Objective

In this lab you will learn how to use some of the features available in the System i Access for Web customization function. In particular, you will learn how to manage different homepage content for different users. The labs will customize home pages for a make-believe boat company called Access for Water.

Before starting the lab exercises, make sure you have read the **Lab Instructions** document. Information contained in that document will be used in the lab tasks.

Good luck with the lab exercises!

Please raise your hand if you have questions!

Task 1: Changing the home page and template files

System i Access for Web provides the following default home page and template files:

`/QIBM/ProdData/Access/Web2/html/homepage.html`

`/QIBM/ProdData/Access/Web2/html/template.html`

NOTE: You should not modify the files in ProdData or create new files in this directory tree. The /QIBM/ProdData tree is intended for product files only.

The **homepage.html** file is the page that is displayed when you access:

`http://<system>:<port>/webaccess/iWAHome`

The **template.html** file contains a header and footer to display on every page (except the home page). The header is displayed before the System i Access for Web content and the footer is displayed after the content. A customized template file must include the tag %%CONTENT%%. When the page is displayed, this tag is replaced with the System i Access for Web content.

There is also a **main** page, with tailorable content. The main page is displayed when you access:

`http://<system>:<port>/webaccess/iWAMain`

Follow these steps to copy the new home page file, template file, and main page content to a new directory.

1. Open a browser session. Open the **System i Access for Web Home URL** from the Lab worksheet section of the lab instructions package. Sign on to i5/OS using the **User ID** and **Password** from the lab instructions.
2. You should see the default System i Access for Web home page. Click the **Files** navigation tab on the left side of your browser window.
3. Click the **Browse files** link. The IFS directory structure will be displayed on the page.
4. The window contains a list of directories. Scroll down and click the **walab** directory link to display its contents.
5. Click on the **homepage** directory that is displayed under the **walab** directory.
6. The window is updated with the contents of the homepage directory. Scroll down until you find homepage.html. Click the **Copy** image (in the Action column) for file 'homepage.html'.

7. Select the **Browse** button. Select the appropriate **waxxdir** by selecting the button next to the directory name. Click the **Select** button. Click the **Copy File** button. (Alternatively, if you prefer typing, you can enter **/walab/homepage/waxxdir** in the **Destination** field (where xx is your team number))
8. Scroll down the window again until you find file 'template.html'. Click the **Copy** image (in the Action column) for file 'template.html'.
9. Select the **Browse** button. Select the appropriate **waxxdir** by selecting the button next to the directory name. Click the **Select** button. Click the **Copy File** button.
10. Scroll down the window again until you find file 'mainpage.html'. Click the **Copy** image (in the Action column) for file 'mainpage.html'.
11. Select the **Browse** button. Select the appropriate **waxxdir** by selecting the button next to the directory name. Click the **Select** button. Click the **Copy File** button.

In this section, you will change the customization settings for **WAxxGROUP** to use the Access for Water template file. The group **WAxxGROUP** contains the users **WAxx** and **WAxxADM**.

1. In the System i Access for Web browser window, click the **Customize** navigation tab on the left side of the window.
2. Click the **Policies** link.
3. Enter group profile name **WAxxGROUP** (where xx is your team number) in the **Profile** edit field and click the **Edit policies** button.
4. Click the **Edit Polices – General** image (in the Action column) for the General category.
5. In the **Template HTML file** policy Setting field, remove the current setting value and enter **/walab/homepage/waxxdir/template.html** (where xx is your team number) into the setting field.
6. In the **Navigation bar** policy Setting field, select **Hide** from the dropdown list in the Setting column.
7. Click the **Save** button at the end of the policy list.
8. You should now see the new look provided by the template file.

Follow the next steps to change the default home page to a new page that has been tailored for our boat company.

1. Click the **Edit Policies - General** image (in the Action column) for the General category.
2. In the **Home page HTML file** policy Setting field, remove the current setting value and enter **/walab/homepage/waxxdir/homepage.html** (where xx is your team number) into the setting field.

3. To allow us to navigate for the rest of this lab, we need to turn the Navigation bar back on temporarily. In the **Navigation bar** policy Setting field, select **Show** from the dropdown list in the Setting column. (In a real world environment where you replaced the default home page with your specific content, you would normally leave the Navigation bar setting set to **Hide**)
4. Click the **Save** button at the end of the policy list.
5. Click the **My Home Page** link in the upper left corner of the navigation bar.
6. You should now see the Access for Water home page.
7. We have put a **Main** link under the home page header banner to allow for navigation during the lab. You may not want to do this in a typical production environment where you are trying to restrict the functions a user sees.
8. Click on the **Main** link. You should now see the System i Access for Web main page content. In addition to modifying the home page, some administrators may find it advantageous to keep the main page visible to their users. In this case, the administrator may want to replace the page content with something useful for their business.

9. In the System i Access for Web browser window, click the **Customize** navigation tab on the left side of the window.
10. Click the **Policies** link.
11. Enter group profile name of **WAxxGROUP** (where xx is your team number) in the **Profile** edit field and click the **Edit policies** button.
12. Click the **Edit Policies - General** image (in the Action column) for the General category.
13. In the **Main page HTML file** policy Setting field, remove the current setting and enter **/walab/homepage/waxxdir/mainpage.html** (where xx is your team number) into the setting field.
14. In the **Navigation - Related links** policy field setting, set it to **Deny**. This will hide the related links information found on the navigation bar.
15. Click the **Save** button the end of the policy list.
16. Click the **My Home Page** link in the upper left corner of the navigation bar. You should now see the Access for Water home page.
17. Click the **Main** link. You should now see the new main page content.

Task 2: Adding a Boats database request to the home page

As you can see the boat home page isn't complete. Right now, **WAxx** and **WAxxADM** cannot do anything on the home page. In this task, and the following tasks, we will be adding useful links to the home page called Access for Water.

The first section we will complete is the Service section. In the Service section, there are two links that point to invalid resources. In this section you will update the home page file to include the correct URLs to allow the users access to certain functions. You will also add another group of links that will only be allowed by specified users, in this case a set of administrators.

The first link you will update will allow the customer to see all the boats listed in the boat database table. Follow the steps below to create a System i Access for Web database request, and add the URL for that request to the Access for Water customized **homepage.html** file.

1. From the main page, click the **Database** tab in the System i Access for Web navigation bar.
2. Click the **Run SQL** link.
3. In the **SQL Statement** text box, enter: `select * from boats.boats`
4. In the **SQL Output --> Type** dropdown dialog, select **Hypertext Markup Language (.html)**.
5. Click the **Run SQL** button. If the SQL request runs successfully, click the **Back** button in the browser session window to return to the Run SQL page.
6. Click the **Save Request** button.
7. In the **Request name** field, type **waxx_request** (where xx is your team number).
8. In the **Description** field, type **waxx All Boats**.
9. Select the **Replace if already exists** checkbox.
10. Click the **Save Request** button.
11. Click the **My requests** link.
12. Click the **Create Shortcut** image (in the Action column) for the **waxx_request** request.
13. In the **Shortcut name** field, replace the default name with **waxx_public** (where xx is your team number).
14. Click the **Add…** button for the Access field, select **All users** from the list of Users, click the **OK** button.
15. Click the **Create Shortcut** button.
16. Click the **My requests** link in the navigation bar on the left.
17. Click the **Run** image (in the Action column) for the **waxx_public** request.
18. The request will run and the boat data will be displayed in the browser session.
19. Now highlight (select) part of the URL request. Just highlight (select) everything after **http://<system name>:<port>**. Don't highlight (select) **http://<system name>:<port>**. Now select the **Edit** pulldown, and select the **Copy** option. Or just hit **Ctrl+C** keys with part of the URL request highlighted (selected). The highlighted portion of the URL should look similar to this (the request and access parameter order may be different):

    ```
    /webaccess/iWADbExec/sqlOutput.html?request=waxx_public&acc
    ess=*PUBLIC
    ```

20. Click the browser **Back** button.
21. Now we need to modify the home page to include a link to the request that was just created and run. Click the Windows **Start** button, select the **Run...** Option. In the **Open** field, type...

```
wordpad c:\walab\homepage\homepage.html
```

22. Search for text similar to...

```
<!-- ************************** -->
<!-- Add list of Services here  -->
<!-- ************************** -->
```

23. Directly underneath this text, there are a couple of html statements. In the first statement listed you will need to replace the **ServiceLink1** text with the URL address that was copied above in step 19. Highlight (select) the **ServiceLink1** text (not including the double quotes), select the **Edit** pulldown menu, and select the **Paste** option to paste in the URL address. Do not remove the double quotes. You should have a line that looks like the following (but it should all be on one line):

```
<a href="/webaccess/iWADbExec/sqlOutput.html?request=waxx_p
ublic&access=*PUBLIC">View available boats</a><br>
```

Note: Parameter order may be different than what is shown above. This is OK.

24. If you want to add the title **Available Boats** to the web page, add the parameter **&caption=Available%20Boats** to the end of the URL address. If you add the caption parameter then your html statement should look like the following (but it should all be on one line):

```
<a href="/webaccess/iWADbExec/sqlOutput.html?request=waxx_p
ublic&access=*PUBLIC&caption=Available%20Boats">View avail
able boats</a><br>
```

25. Click the **File** pulldown menu and select the **Save** option to save the changes. Close the Wordpad window.
26. In the browser session, click the **Files** tab in the navigation bar. Click the **Browse files** link.
27. In the Browse files window, click the **walab** directory link, click the **homepage** directory link, click the **waxxdir** directory (where xx is your team number) link. The window should be updated with the files that exist in the waxxdir directory.
28. Select **Copy Files to System** from the drop-down list near the top of the page. Click the **Perform action** button that is to the right of the drop-down list. The **Copy Files to System** page is displayed.

29. In the **File** field, type or browse for **C:\WALAB\homepage\homepage.html**, select the **Replace file** checkbox, click the **Copy File** button.
30. In the upper left, at the top of the Access for Web navigation bar, select the **My Home Page** link.
31. You should now have a **View available boats** link under the Services section. Click the link which will run the System i Access for Web database request that you saved earlier. The output will be displayed in the session window.
32. The **WAxxGROUP** may not like how the data is displayed. You as an administrator could change the look by changing the saved database request to output in a different format.
33. Click the **Main** link located on the home page.
34. Click the **Database** tab.
35. Click the **My requests** link.
36. Click the **Edit** image (in the Action column) for the **waxx_request** request. Change the **SQL Output --> Type** field to **Preview**.
37. Click the **Save Request** button.
38. Select the **Replace if already exists** checkbox, click the **Save Request** button.
39. In the upper left, at the top of the Access for Web navigation bar, select the My Home Page link.
40. Select the **View available boats** link. The database output should be updated to display differently.

Task 3: Adding a 5250 Boats application to the home page

The second link you will update will start a 5250 application called boats. You will be using a parameter called **initmac**. This parameter identifies a macro to run after a session is started. Follow the steps below to create a macro called startboats, and add the link to the "Access for Water" home page.

In order to create a macro you will need to sign on as the users that will be using the "Access for Water" home page. This is because a macro can only be accessed by the user that creates it and since we want to use a macro on this home page, we will need to have each user create it.

We now need to create a macro for **WAxx** and **WAxxADM**. (where xx is your team number)

1. Click the **Main** link located on the home page.
2. Click the **5250** tab in the System i Access for Web navigation bar.

3. Click the **Start Session** link.
4. Leave the field defaults as they are displayed. Click the **Start Session** button.
5. Select the **Start Recording** button to begin recording the macro.
6. Signon to the 5250 session as **WAxx**. (where xx is your team number) Hit enter until you get to a command screen.
7. Type **boats/boats** on the command line and hit enter to run the boats application.
8. Click the **Stop Recording** button.
9. In the Macro field, enter **startboats**, click the **Replace if already exists** checkbox, and click the **Save Macro** button.
10. Press the F3 key until you get to a screen with a command line. Type the command **SIGNOFF** and press the Enter key or select the Enter button in the keypad below the session window.
11. Click the **Active sessions** link in the 5250 tab on the System i Access for navigation bar.
12. Click the **Stop** image (in the Action column) to stop the currently active session.
13. If you want the link to work correctly when using **WAxxADM,** repeat the steps 1-11 above, except use **WAxxADM** instead of **WAxx**. (where xx is your team number)
14. Now we need to modify the home page to include a link to the 5250 application that was just created and run. Click the Windows **Start** button, select the **Run...** Option. In the **Open** field, type...

    ```
    wordpad c:\walab\homepage\homepage.html
    ```

15. Search for text similar to...

    ```
    <!-- ************************** -->
    <!-- Add list of Services here   -->
    <!-- ************************** -->
    ```

16. Directly underneath this text, there are a couple of html statements. In the second statement listed you will need to replace the **ServiceLink2** text with the following URL address that will start a session and run your macro. The URL address to start the session is:

    ```
    /webaccess/iWA5250?initmac=startboats
    ```

    After replacing the ServiceLink2 text with the URL address, the html statement should look like the following (but it should all be on one line):

    ```
    <a href="/webaccess/iWA5250?initmac=startboats">See boat
    details</a><br>
    ```

17. Click the **File** pulldown menu and select the **Save** option to save the changes. Close the Wordpad window.
18. In the browser session, click the **Files** tab in the navigation bar. Click the **Browse files** link.
19. In the Browse files window, click the **walab** directory link, click the **homepage** directory link, click the **waxxdir** directory link(where xx is your team number). The window should be updated with the files that exist in the waxxdir directory.
20. Select **Copy Files to System** from the drop-down list near the top of the page. Click the **Perform action** button that is to the right of the drop-down list. The **Copy Files to System** page is displayed.
21. In the **File** field, type or browse for **C:\WALAB\homepage\homepage.html**, select the **Replace file** checkbox, click the **Copy File** button.
22. In the upper left, at the top of the Access for Web navigation bar, select the My Home Page link.
23. The **See boat details** link under the Services section should now run the 5250 boats application.

Task 4: Adding administrator specific tasks to the home page

You can add a group of links in the Service section that can only be viewed by administrators. You won't need to create separate home pages for customers and administrators. You can do this by using the System i Access for Web *include list* support. The home page can contain an include list replacement flag. The format of the tag is %%include list=*file*%% where *file* identifies a file containing list items to include as links in a table. Follow the steps below to use this feature.

1. There is a policy file already set up for you to use. To open it, click the Windows **Start** button, select the **Run...** Option. In the **Open** field, type...

   ```
   wordpad c:\walab\homepage\adminserv.policies
   ```

2. Search for text that is similar to

   ```
   <profile name="WAxxADM">
   ```

3. Replace xx with your team number. This will allow **WAxxADM** access to the links
4. Click the **File** pulldown menu and select the **Save** option to save the changes. Close the Wordpad window.

5. In the browser session, click the **Files** tab in the navigation bar. Click the **Browse files** link.
6. In the Browse files window, click the **walab** directory link, click the **homepage** directory link, click the **waxxdir** directory (where xx is your team number) link. The window should be updated with the files that exist in the waxxdir directory.
7. Select **Copy Files to System** from the drop-down list near the top of the page. Click the **Perform action** button that is to the right of the drop-down list. The **Copy Files to System** page is displayed.
8. In the **File** field, type or browse for **C:\WALAB\homepage\adminserv.policies**, select the **Replace file** checkbox, click the **Copy File** button.
9. Now you will need to include the policy file into the home page that will be displayed. Click the Windows **Start** button, select the **Run...** Option. In the **Open** field, type...

    ```
    wordpad c:\walab\homepage\homepage.html
    ```

10. Search for text similar to...

    ```
    <!-- ************************* -->
    <!-- Add Adminserv.policies here -->
    <!-- ************************* -->
    ```

    Directly after this text, add the following statement:

    ```
    <td>%%include list=/walab/homepage/waxxdir/adminserv.poli
    cies%%</td>
    ```

    It should all be on one line, with a space between the include and list keywords. Make sure to replace the **xx** in **waxxdir** with your team number.

11. Click the **File** pulldown menu and select the **Save** option to save the changes. Close the Wordpad window.
12. In the browser session, click the **Files** tab in the navigation bar. Click the **Browse files** link.
13. In the Browse files window, click the **walab** directory link, click the **homepage** directory link, click the **waxxdir** directory (where xx is your team number) link. The window should be updated with the files that exist in the waxxdir directory.
14. Select **Copy Files to System** from the drop-down list near the top of the page. Click the **Perform action** button that is to the right of the drop-down list. The **Copy Files to System** page is displayed.
15. In the **File** field, type **C:\WALAB\homepage\homepage.html**, select the **Replace file** checkbox, click the **Copy File** button.
16. Open a new browser session signing on as **WAxxADM**.

17. You should now have additional links under the links that you added earlier. If you open a new browser session and sign on as **WAxx** you won't see the links. The list of items that you included can also be tailored to a group of users or all users (*PUBLIC). You can also add additional profile sections to adminserv.policies if, for instance, you want to have special links that only customers can use.

    NOTE: You need to use character references for characters that can be included in an XML document. For example, if you have a link with multiple parameters, you need to replaces & with &amp.

18. Close the WAxxADM "Access for Water" browser windows.

Task 5: Adding an image and movie to the home page

Under the "This Week's Special" section, a picture of the boat special should be displayed along with a description. You will also show an Mpeg movie of the boat. To do this, you will need to update the home page to include this information. Open up the latest copy of the home page that you created.

1. Click the Windows **Start** button, select the **Run...** Option. In the **Open** field, type...

   ```
   wordpad c:\walab\homepage\homepage.html
   ```

2. Search for text similar to...

   ```
   <!-- *************************** -->
   <!-- Add This Week's Special here -->
   <!-- *************************** -->
   ```

3. After the following comment line,

   ```
   <!-- Add text to display carver.jpg here -->
   ```

   Add the following line of text.

   ```
   <img src="../images/carver.jpg" height=153 width=252>
   ```

   This is an html image tag. It will add the image of a boat to your home page.

4. After the following comment line,

```
<!-- Add description and link to mpeg here -->
```

Add the following line of text.

```
<br><br>Beautifully maintained 28 foot 1978 Carver Santa
Cruz for only $23,900. Click <a href="/webaccess/iWAFileD
ownload/carver.mpg?filepath=/walab/homepage/images/carv
er.mpg">here</a> to see this boat cruising the
seas.<br><br><br>
```

It should all be on one line with no spaces in the value specified on the 'href=' tag.

This will add the description and link to run the Mpeg movie of the boat.

Note: If you do not want to type this html text in directly, click the Windows **Start** button, select the **Run…** option. In the **Open** field, type…

```
wordpad c:\walab\homepage\customize.txt
```

Find this HTML line of text in the 'customize.txt' file. Use the cut and paste functions of wordpad to copy this line of text from the **customize.txt** file and paste it into the **homepage.html** after the comment line described above.

5. Click the **File** pulldown menu and select the **Save** option to save the changes. Close the Wordpad window.
6. In the browser session, click the **Files** tab in the navigation bar. Click the **Browse files** link.
7. In the Browse files window, click the **walab** directory link, click the **homepage** directory link, select the **waxxdir** directory (where xx is your team number) link. The window should be updated with the files that exist in the waxxdir directory.
8. Select **Copy Files to System** from the drop-down list near the top of the page. Click the **Perform action** button that is to the right of the drop-down list. The **Copy Files to System** page is displayed.
9. In the **File** field, type **C:\WALAB\homepage\homepage.html**, select the **Replace file** checkbox, click the **Copy File** button.
10. Open a new browser session signing on as user **WAxxADM** or **WAxx**.
11. You should see an image of a boat and a link to run the mpeg movie.
12. Close the new "Access for Water" browser window.

Task 6: Adding a Contact Us function to the home page

Now we will add a section of the home page that provides customers with a way to send their comments and questions to the boat company.

1. Click the **Messages** tab in the System i Access for Web navigation bar.
2. Click the **Send Message** link.
3. Now highlight (select) part of the URL request. Just highlight (select) everything after **http://<system name>:<port>**. Don't highlight (select) http://<system>:<port>. Now select the **Edit** pulldown, and select the **Copy** option. Or just hit **Ctrl+C** keys with part of the URL request highlighted (selected). The part that you highlight should look like this…

   ```
   /webaccess/iWASendMessage
   ```

4. Now we need to modify the home page to include a link to the request that was just created and run. Click the Windows **Start** button, select the **Run...** Option. In the **Open** field, type...

   ```
   wordpad c:\walab\homepage\homepage.html
   ```

5. Search for text similar to:

   ```
   <!-- *********************** -->
   <!-- Add Site Support here    -->
   <!-- *********************** -->
   ```

6. Underneath this text, there is an html statement. In the first statement listed you will need to replace **SiteSupport** with the URL address that was copied above in step 3. Highlight (select) the **SiteSupport**, select the Edit pulldown menu, and select the Paste option to paste in the URL address. Do not remove the double quotes. You should have a line that looks like this…

   ```
   <a href="/webaccess/iWASendMessage">Send us a message</a>
   ```

7. Click the **File** pulldown menu and select the **Save** option to save the changes. Close the Wordpad window.
8. In the browser session, click the **Files** tab in the navigation bar. Click the **Browse files** link.
9. In the Browse files window, click the **walab** directory link, click the **homepage** directory link, click the **waxxdir** directory (where xx is your team number) link. The window should be updated with the files that exist in the waxxdir directory.

10. Select **Copy Files to System** from the drop-down list near the top of the page. Click the **Perform action** button that is to the right of the drop-down list. The **Copy Files to System** page is displayed.
11. In the **File** field, type **C:\WALAB\homepage\homepage.html**, select the **Replace file** checkbox, click the **Copy File** button.
12. In the browser session that is running "Access for Water", refresh the session or close it and open a new browser session signing on as either **WAxx** or **WAxxADM**.
13. You should now see the new link under the Site Support section. Click the link which will run the System i Access for Web send message support. The Send Message screen should be displayed in the session window.
14. Close the browser window.

Task 7: Adding an external weather site to the home page

Note: Skip this lab if you do not have access to the Internet. To determine if you have external access, try going to www.ibm.com in the browser session.

This task does not include adding access to any System i Access for Web support, but shows you are not restricted to System i Access for Web functions on your home page. Follow the steps below to add this section. We are going to add a link to access the www.weathercenter.com if you click anywhere on the image.

1. Click the Windows **Start** button, select the **Run...** Option. In the **Open** field, type...

   wordpad c:\walab\homepage\homepage.html

2. Search for text similar to...

   ```
   <!-- ***************************** -->
   <!-- Add Weather Conditions link here -->
   <!-- ***************************** -->
   ```

3. Underneath this text, add the following statement.

   ```
   <a href="http://www.theweathercenter.com">
   <img src="../images/weather.gif" border="0"
   width="316" height="228"></a>
   ```

   It should all be on one line.

4. Click the **File** pulldown menu and select the **Save** option to save the changes. Close the Wordpad window.
5. In the browser session, click the **Files** tab in the navigation bar. Click the **Browse files** link.
6. In the Browse files window, click the **walab** directory link, click the **homepage** directory link, select the **waxxdir** directory (where xx is your team number) link. The window should be updated with the files that exist in the waxxdir directory.
7. Select **Copy Files to System** from the drop-down list near the top of the page. Click the **Perform action** button that is to the right of the drop-down list. The **Copy Files to System** page is displayed.
8. In the **File** field, type **C:\WALAB\homepage\homepage.html**, select the **Replace file** checkbox, click the **Copy File** button.
9. Open a new browser session signing on as either **WAxx** or **WAxxADM**.
10. You should now see the image under the Weather Conditions section that you can click to view www.theweathercenter.com. Click on the image to check out the weather.
11. Close the browser.

Task 8: Adding additional replacement tags to the home page

System i Access for Web supports some additional replacement tags in the home page files. Please feel free to try them out now that you know how to update the home page. Here are the replacement tags:

%%TITLE%%	Replaced with the page title.
%%USER%%	Replaced with the authenticated user name.
%%SYSTEM%%	Replaced with the name of the i5/OS system being accessed.
%%VERSION%%	Replaced with the version of System i Access for Web currently installed.

Task 9: Resetting Preference and Policy settings to their default values

This task shows you how to reset policy settings to their default values. The following steps will reset the preference and policy settings you updated the tasks above. You should reset these settings before continuing on with other lab exercises.

1. Click the **Customize** navigation tab on the left side of your browser window.
2. Click the **Policies** link.
3. Click the **Group profiles** link.
4. Locate your **WAxxGROUP** (where xx is your team number) profile.
5. Click the **Reset policies** image (in the Action column) for your group profile.
6. Click the **Reset Policies** button on the **Confirm Reset Policies** page.
7. From the tasks above, verify the settings have been restored to their default values. You may have to hit the Refresh or Reload buttons on your browser to make sure the browser isn't displaying a cached page.

Congratulations!

You have completed this System i Access for Web lab!

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