

Sterling B2B Integrator



Dashboard

Version 5.2

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Note

Before using this information and the product it supports, read the information in "Notices" on page 27.

Copyright

This edition applies to Version 5 Release 2 of Sterling B2B Integrator and to all subsequent releases and modifications until otherwise indicated in new editions.

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Dashboard

The IBM® Sterling B2B Integrator interface is a *dashboard-style* interface. Much like the dashboard in a car that provides at-a-glance information about your speed, fuel level, and other performance measures, the dashboard interface shows you important system information in a customizable format designed to make your monitoring and management tasks quicker and easier than ever before.

The dashboard is designed to provide information specific to the Sterling B2B Integrator features you have installed. For example, core customers have a different dashboard display than do the Advance File Transfer customers.

The dashboard design offers a variety of benefits. You can:

- Customize the contents of a page to prominently display the information most important to you. For instance, you may place monitors showing database usage or trading partner activity at the top of your home page.
- Remove components you don't need from your page displays.
- Link to data maintained in locations outside of the interface, such as news or stock market reports for display on your page.

For details about how to manage the dashboard features to maximize visibility into your system operations and trading community activity, see *Dashboard Configuration*.

Dashboard interface

A *dashboard* is a user-configurable interface that provides summarized information at a glance.

For Sterling B2B Integrator, the summarized information displays through portlets arranged on panes in a dashboard.

- A *pane* is a page in a dashboard like a page in a photo album that has several pictures on it, along with a name tab attached identifying the category of pictures.
- A *portlet* is a graphical representation of information in the system displayed on a pane. A portlet is like a picture on the album page showing a snapshot of an event.

Dashboard panes and portlets provide you with a portal view into your Sterling B2B Integrator activities, as well as activities involving your trading partners. You can also provide visibility into your systems to your trading partners through customized portlets.

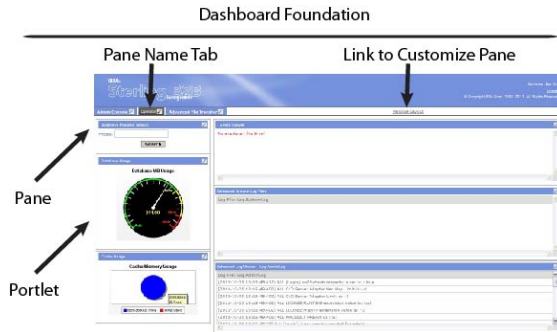
Dashboard Components

Within the interface, tabbed pages called *panes* provide access to different categories of information. Dashboard panes are pages that have:

- **Pane Name Tabs** – The tabs are links to each pane in the dashboard. Click a tab to switch between panes in the dashboard. You can arrange the panes so that the pane you want to be your home page displays first in the row of tabs.

- Portlets - Elements that provide at-a-glance snapshots of system operations. You can customize the display to show the portlets of your choice, in the arrangement you prefer.

The following figure shows dashboard components:



Provided Dashboard Panes at Login

The panes that display by default at login differ according to your user account settings and product component licensing. The standard Sterling B2B Integrator dashboard interface displays as follows, provided dashboard settings have not been modified:

- The system administrator has the Admin Console and Operator panes. For information about the portlets included in the administrator's Operator pane, see *Standard Dashboard Interface*.
- General users have only the Admin Console pane.
- Advanced File Transfer Suite users have the Admin Console and Advanced File Transfer panes, according to the single theme available for that component that has been assigned by their administrator.

Users of different editions of Sterling B2B Integrator, such as the AS2 Edition, have a standard display with only an edition-specific home pane, but these dashboards display by default at login to the edition and are not tied to dashboard themes.

Regardless of your configuration, clicking a tab links you to its associated pane. Tabs to panes for which you do not have access do not display.

In addition, the Manage Layout link to the Customize pane displays to the right of the tabs for all users. The Customize pane enables all users to modify their dashboards.

For a description of available panes, see *Dashboard Panes*.

Dashboard configuration

Your Sterling B2B Integrator configuration may comprise a complex system of interactivity between clustered copies of Sterling B2B Integrator, trading partner communities, and external applications and operating systems.

Using the dashboard interface, you can create a customized portal view into both the internal and external Sterling B2B Integrator services related to your

organization's activities. The dashboard facilitates your monitoring and management tasks by putting the information you most frequently need at your fingertips.

Enhance Visible Business Using the Dashboard

Each pane in the dashboard is a Web page containing a snapshot of administrator-assigned or user-selected portlets, focused on the specific business needs of the user.

For example, using dashboard components, you can do all of the following from one "front page" location:

- Track EDI activity between your system and your top ten trading partners.
- Monitor system activity for errors and efficiency.
- Monitor average processing times.
- Review current system status.
- Link to data maintained in locations outside of the interface, such as news or stock market reports for display on your page.
- Display another Web site or system through a specified portlet.

Dashboard configuration centers on customizing displays according to business need. Several preconfigured dashboard themes organized around specific business needs are provided for you. The ability to modify themes to suit your requirements as needed gives you even more flexibility. For information about dashboard themes, see *Dashboard Themes*.

For information about configuring dashboard displays, see *Dashboard Configuration*.

Dashboard Configuration

Dashboard configuration can be performed at two different levels:

- By an administrator, for one or more groups of users and for single or multiple individuals
- By a user, to personalize his or her own display

You (or your administrator) can customize your dashboard in a variety of ways. Preconfigured dashboard themes contain panes and portlets targeted to specific types of users. These themes can be edited and assigned to user accounts by the administrator. All users can customize their displays so that information is arranged in an easily-referenced format.

For general users, dashboard configuration consists of adding and removing panes and portlets, labeling portlets and panes, arranging portlets on panes, and customizing portlet content or display format.

In addition to these general tasks, administrators can also create and modify dashboard themes and assign themes to one or more users. Administrators have authority to limit the portlets available to general users for whom they create user accounts (through assigning or denying associated permissions), and can create groups related to permissions for specific portlet access and themes.

Configure the Dashboard

About this task

Configuring dashboards involves the following steps:

Procedure

1. Choose a preconfigured theme, if desired.

Note: Only administrators can assign a theme, which is part of the user account creation process. Six preconfigured themes are provided with Sterling B2B Integrator, and you can log in directly to these themed interface options. For information, see *Dashboard Themes*.

2. Add or modify panes, if desired. You can modify the provided panes or create panes to suit your needs. For information, see *Dashboard Panes*.
3. Add, remove, or modify portlets or portlet content, if desired. For information, see *Dashboard Portlets*. For descriptions of available portlets, see *Portlet Descriptions*.

Dashboard Planning Considerations

As you plan your dashboard display, think about the information you most frequently view and monitor, and consider using the flexibility of the dashboard design to put that information in your own customized home pane for quick reference.

Then, you can add panes to display portlets for access to other features that you use less frequently, or that fall into another category of tasks. For example, you need only system monitoring data on your home pane, but want additional tools at your disposal in a separate pane for working with trading partners.

Portlets Are Only Useful with Related Data

Many portlets display system activity, such as documents processed, system event and log file contents. Others detail statistics such as database usage. Remember that portlets cannot display information unless it exists in Sterling B2B Integrator. For example, the EDI Documents Processed in Timeseries portlet cannot display data unless EDI documents are processing or have processed. For details about the various portlets available, see *Dashboard Portlets*.

Dashboard themes

Theme management is the first stage in dashboard configuration. Managing dashboard themes is an Administrator task that may be as simple as leaving the standard configuration for all user accounts, or as complex as customizing multiple themes, permission groups, and assigning them to users on a case-by-case basis.

You assign themes to a user account during the user account creation process. Only AFT Suite administrators can use and modify themes. However, a Sterling B2B Integrator administrator not using one of these components can still assign user permission to a variety of portlets when creating a user account, which enables the user to add those portlets to their personal dashboard if desired. For a list of the portlets available when no theme is assigned, see *Standard Dashboard Interface*.

- For instructions on customizing dashboard themes, see *Customized Dashboard Themes*.

- For information about the process of assigning preconfigured Sterling B2B Integrator themes in user accounts, see *Assign Dashboard Themes in User Accounts*.

How User Permissions Relate to Dashboard Themes

Regardless of any display you assign or configure for a given user, the user can modify his or her dashboard to suit personal needs, as individual permissions allow.

You can restrict user permission to individual portlets during the user account creation process. However, be certain not to assign a preconfigured dashboard theme while simultaneously restricting access to a portlet that is part of the theme, because the theme configuration overrides your portlet permissions selection; the portlet will display in the user's dashboard (it displays an error message).

The Administrator can modify the contents and display of a preconfigured dashboard theme at any time. However, modifications will not affect any users assigned to the theme prior to its changes being made; only new user accounts assigned to that theme will have the modified theme. Essentially, new users obtain their assigned dashboard theme the first time they log in, but can customize the display as their permissions allow from that point on, without being affected by any future theme changes made by the Administrator.

Preconfigured Dashboard Themes

For your convenience, Sterling B2B Integrator includes preconfigured dashboard themes for the AFT Suite that display portlets targeted to a specific business need.

The Administrator can assign dashboard themes to users during the user account creation process as befits the users' responsibilities within the organization. In this way, user interfaces are tailored to a user's needs at the time of login.

The themes provide a starting point for customized organization of the dashboard interface; each theme is created for a common usage of Sterling B2B Integrator. You select the themes during user account creation, in the Dashboard Theme field (the value in the Accessibility field must be **Dashboard UI** in order to select themes). The preconfigured themes work with specific components as noted in the following table:

Theme Name	Works with this Sterling B2B Integrator Component	Description
AFT	Advanced File Transfer	For users of the Advanced File Transfer Suite; see <i>AFT Theme</i>

The Administrator can modify these themes as needed. Preconfigured Administrator user accounts for each theme are provided with Sterling B2B Integrator to enable you to modify the themes. For information about managing themes, see *Customized Dashboard Themes*.

Individual users to whom a theme has been assigned can modify their panes and portlets as needed, with possible restrictions depending on permissions assigned in the user account.

Note: When you are not using preconfigured dashboard themes, the standard interface includes the Admin Console pane for general users and displays the Admin Console and the Operator panes for the administrator. For this to occur, the Accessibility value in your account is set to **Admin UI** and the Dashboard Theme field is set to **inactive**. You do not have a theme assigned but rather have the standard dashboard interface. For more information, see *Standard Dashboard Interface*.

Modify the Default Display for a User

About this task

There is no provided User ID and password for the default theme, therefore you cannot modify this theme at the administrative level. To modify the display for a user:

Procedure

1. Create a user account and assign the default theme for the Dashboard UI.
2. Log out.
3. Log in using the user's ID and password that you just created and modify the display.
4. Log out.

What to do next

You would have to complete these steps for every user you wanted to have the modified theme. A better option is to modify another existing theme and assign it as needed.

Default Theme

The default dashboard theme provides quick access to information specific to administrative or general users of Sterling Integrator. This information may be useful to a manager who wants a quick overview of system functioning and document processing, with the ability to track document processing.

There is no provided User ID and password for the default theme, therefore you cannot modify this theme at the administrative level. You would have to complete these steps for every user you wanted to have the modified theme. A better option is to modify another existing theme and assign it as needed.

Users assigned this or any theme can customize their own displays.

The following table lists the included panes and portlets for the default theme:

Pane	Included portlets
Admin Console	<ul style="list-style-type: none">• Administration Management Console (this comprises the entire standard Sterling B2B Integrator administration pane)

Pane	Included portlets
Operator	<ul style="list-style-type: none"> • Business Process Search • Database Usage • Cache Usage • Event Viewer • Enhanced Log Viewer (System log) • Enhanced Log Viewer (Work Flow log)
Advanced File Transfer	<ul style="list-style-type: none"> • AFT Suite features <p>Note: This pane displays only if you are a licensed AFT Suite user.</p>

AFT Theme

The AFT Suite AFT theme provides quick access to the Advanced File Transfer Suite home page, enabling users to manage and monitor dynamic file exchange involving transfer of files within and between organizations.

The following table lists the included panes and portlets for the AFT theme:

Pane	Portlets
Admin Console	Administration Management Console (this comprises the entire standard Sterling B2B Integrator administration pane)
Advanced File Transfer	Advanced File Transfer Management (this comprises the entire Advanced File Transfer pane)

Customized Dashboard Themes

The Administrator can create a customized dashboard display for general users in either of the following ways:

- Modify a preconfigured dashboard theme – Using this option enables you to assign the dashboard theme to multiple users without having to create the same custom dashboard multiple times. The preconfigured name of the theme remains the same regardless of any changes you make to its pane and portlet configuration.
- Log in to Sterling B2B Integrator as the user and tailor the user's display – Using this option enables you to create a themed display but does not store the themed arrangement for later assignment to other users. Use this option if you do not want to modify a preconfigured dashboard theme or you do not need to assign the configuration to other users.

Note: Regardless of any theme you assign or display that you configure, users may modify their dashboard displays as the permissions assigned in their user accounts permit.

Modify a Preconfigured Dashboard Theme About this task

To modify a preconfigured dashboard theme:

Procedure

1. Log in to Sterling B2B Integrator using the provided user ID and password for that theme.

For descriptions of the preconfigured themes, see *Preconfigured Dashboard Themes*.

2. Modify the dashboard display as needed. For instructions, see *Dashboard Panes* and *Dashboard Portlets*. When you save your changes, the theme is updated.
3. Log out and log back in using your usual user ID and password. You can now assign the customized theme to new users in the user account creation procedure. See *Assign Dashboard Themes in User Accounts*.

Standard Dashboard Interface

For general users not assigned a dashboard theme, the interface displays only the Admin Console pane by default. The system administrator's dashboard includes the Operator pane and the Admin Console pane. While only AFT Suite users can use predefined, provided dashboard themes, standard Sterling B2B Integrator users can still configure their dashboards provided the administrator provides access to portlets.

The administrator can assign permission to some or all of a variety of portlets while creating a user account. This enables general users to configure their own additional panes containing the portlets.

Administrator's Operator Pane

The Sterling B2B Integrator system administrator's dashboard display includes the Operator pane, although the administrator's user account is not preconfigured to be associated with any dashboard theme.

For this user, the Operator pane displays the following portlets:

- Business Process Search
- Database Usage
- Cache Usage
- Event Viewer
- Enhanced System Log Files
- Enhanced Log Viewer

For information about the portlets, see *Portlet Descriptions*.

Assign Dashboard Themes in User Accounts

About this task

To assign a dashboard theme, perform one of the following:

Procedure

- To assign a dashboard theme in the user account creation process, you must set the value in the Accessibility field to **Dashboard UI** and then select the appropriate theme in the **Dashboard Theme** field. If you assign a dashboard theme to a user who does not have the appropriate license the theme does not display. The user will have only the Admin Console pane.

- To assign a dashboard theme to a previously-saved user account that did not have Dashboard UI access, you must delete the user account and create a new one with the proper **Accessibility** and **Dashboard Theme** selections.

Dashboard panes

A *pane* is a page in a dashboard like a page in a photo album that has pictures on it, along with a name tab attached identifying the category of pictures. In the dashboard interface, the pictures are the portlets that provide the information you need.

Panes are generally composed of portlets displaying information related to a theme, such as system monitoring.

For example, the preconfigured Operator pane provides a graphic overview of system database and cache usage, a link to search for business processes (to monitor them) and event log viewers. You might want a pane that shows only logs and has a more specific name, such as “Log Viewer.”

You can even use a pane to show activity related to another copy of Sterling Integrator through the copy you are working in.

In addition to adding and removing panes, pane management may include rearranging your dashboard display to most prominently display the information most important to you. For instance, you can make any pane your home pane, or place monitors showing trading partner activity at the top of your home pane.

Available Panes

The following table describes the panes available in Sterling B2B Integrator:

Pane	Description
Admin Console	<p>The Administration Management console is your access to the standard Sterling B2B Integrator features you require to complete your job.</p> <p>The pane displays system alerts, system news and access to the Graphical Process Modeler (business process creation tool), as well as the Administration Menu for access to business process, services, operations, user account management and other tools you use regularly.</p> <p>The menu items that display may be limited depending on the user account permissions set for you by your system administrator. The pane is comprised of a single portlet.</p>

Pane	Description
Operator	The Sterling B2B Integrator administrator has this pane by default. Click the Operator tab to display this pane. Contains portlets relating information for: <ul style="list-style-type: none"> • Real-time system activities • Real-time log files entries • Database usage • Memory or disk cache usage • Searching for a business process
Advanced File Transfer	An AFT Suite only pane. Click the Advanced File Transfer tab to display this pane. This pane is your access to the AFT Suite features in Sterling B2B Integrator, where you can create and manage AFT communities and monitor routing activities. The pane has a menu on the left providing access to the related features. The pane is comprised of a single portlet.
Customize	All users can access this pane. Click the Manage Layout link to display the Customize pane. The Customize pane enables you to add portlets and panes to your dashboard, and edit the properties of the panes.

Add Panes

About this task

To add a pane to a dashboard:

Procedure

1. From the dashboard page, click **Manage Layout**.
2. In the Customize pane page, click **Add Pane**.
3. In the Customize pane page, type the name of the pane you are adding, and click **Apply**. The system adds the new pane to the list.
4. Click **Save and Apply** to save the pane to the dashboard. You can now add portlets to the new pane and arrange the order of the pane's tab in the dashboard display.

Delete Panes

Before you begin

You may need to delete panes for various reasons:

- Panes may become obsolete
- You need to consolidate portlets from different panes onto one pane.

About this task

To delete a pane from a dashboard:

Procedure

1. From the dashboard page, click **Manage Layout**.
2. In the Customize pane page, in the listed panes area, click the **X** to the left of the pane name you want to delete. The Customize pane page refreshes and the pane is removed from the list.
3. Click **Save and Apply** to completely remove the pane from the dashboard.

Edit Pane Name and Description

About this task

To change the name and description of a pane:

Procedure

1. From the dashboard page, click **Manage Layout**.
2. In the Customize pane page, in the listed panes area, click the name of the pane you want to change the name of.
3. In the Customize pane page, click **Edit Properties**.
4. In the Title field, make any changes to the pane name.
5. In the Description field, make any changes to the pane description.
6. Click **Apply**.
7. Click **Save and Apply** to apply changes to the pane.

Change Pane Column Layout

About this task

You can modify the arrangement of portlets on a pane to display in a single column or in a three-column configuration. To change the pane layout:

Procedure

1. From the dashboard page, click **Manage Layout**.
2. In the Customize pane page, in the listed panes area, click the name of the pane you want to change the layout of.
3. In the Customize pane page, from the Layout list, select one of the following layouts:
 - One column – All portlets line up vertically one under the other to fill the width of the pane.
 - Three Columns (25/50/25) – Portlets line up horizontally in three columns, with the first column occupying 25 percent of the page width, and the second and third columns occupying 50 percent and 25 percent of the page width respectively.
 - Three Columns (33/33/33) – Portlets line up horizontally in three columns, with each column occupying 33 percent of the page width.

Note: Some panes have a default two-column layout. If you change a two-column pane to have a single- or triple-column layout, you can not revert to the two-column format.

4. Click **Apply**.
5. Click **Save and Apply** to apply changes to the pane.

Arrange Portlets on Panes

About this task

You can change the display of the pane with regard to where individual portlets are arranged on the pane. To move a portlet on the pane:

Procedure

1. From the dashboard page, click **Manage Layout**.
2. In the Customize pane page, in the listed panes area, click the name of the pane you want to move a portlet on.
3. In the pane layout page, click the following arrows to move portlets on the pane:
 - Right arrow to move a portlet to the right.
 - Left arrow to move a portlet to the left.
 - Up arrow to move the portlet up.
 - Down arrow to move the portlet down.
4. Click **Apply**.
5. Click **Save and Apply** to save changes to the pane.

Change Pane Color Schemes

About this task

To change the color scheme:

Procedure

1. From any pane in your dashboard, click **Manage Layout**.
2. In the Customize pane page, in the listed panes area, from the Skin list, select the color scheme to use for the dashboard:
 - Default – Blue banners and borders
 - Silver – Silver banners and borders
3. Click **Save and Apply** to save changes to the pane.

Add Portlets to a Pane

About this task

To add a portlet to a pane:

Procedure

1. From the dashboard page, click **Manage Layout**.
2. In the Customize pane page, in the listed panes area, click the name of the pane you want to add a portlet to.
3. In the Customize pane page, click **Add Portlet**.
4. In the portlets list, in the Add column, select the portlet or portlets you want to add. Click **Next** to navigate to the second page in the list if needed.
5. Click **Apply**.
6. Click **Save and Apply** to save the portlet to the pane. You can now customize the portlet and rearrange portlets in the pane.

Delete Portlets from a Pane

About this task

To delete a portlet from a pane:

Procedure

1. From the dashboard page, click **Manage Layout**.
2. In the Customize pane page, in the listed panes area, click the name of the pane you want to delete a portlet from.
3. In the Customize pane page, click the X in the banner of portlet you want to delete.
4. Click **Apply**.
5. Click **Save and Apply** to apply changes to the pane.

Arrange the Tab Order of Panes

Before you begin

When you add a pane to the dashboard interface, Sterling B2B Integrator adds the pane at the end of the list of existing panes, so that the tab for that pane displays at the end of the row of tabs (on the right side) in the dashboard display.

About this task

You may want to rearrange the order of the tabs to make specific tabs more prominent in the display, such as making the tab for the pane you want as your home pane be first in the list (the first pane in the list will be your home page, the page that displays by default when you log in).

Procedure

1. From the dashboard page, click **Manage Layout**.
2. In the Customize pane page, in the **Action** column, next to the pane name you want to move, click the up or down arrows to change the pane's location in the list.
3. Click **Save and Apply** to apply changes to the dashboard.

Dashboard portlets

Portlets are the building blocks of dashboards. A portlet is a graphical representation of information in the system, displayed within a pane framework.

A portlet is like a picture on the album page, showing a snapshot of an event. Portlets display information such as system log entries, database usage, document processing, quick search and document tracking features, and links to external Web sites.

You can set up a variety of dashboards, but without portlets, the panes are empty pages. The ability to add, rearrange, remove, and customize portlets enables you to put the information essential to your specific job function directly at your fingertips. Most portlets are a window into Sterling B2B Integrator activities or configurations, and enable you to click the display to access more detailed information.

The Administrator can customize the dashboard that each user sees, and limit available portlets for a given user account. This provides another means of security, as users only see the components to which they have access. Within the dashboard display that your Administrator provides, you can modify the available portlets and panes to suit your needs.

Sterling B2B Integrator provides a great deal of flexibility in managing your portlet display. You can:

- Add and remove portlets from a pane
- Rearrange portlet layout on a pane
- Change the border style of portlets
- Customize the data content of portlets
- Customize the data presentation of some portlets by specifying bar or pie charts, for example, and selecting the colors you prefer for the display, to enhance visual impact

Maximize the Usefulness of Portlets

About this task

To maximize the usefulness of the provided portlets, you must:

Procedure

1. Determine the processes and data that you most regularly monitor and interact with, and how you interact with it. For example, do you like to verify the processing status of EDI documents? Do you often search for specific business processes to locate detailed information?
2. Plan to include the portlets that display the data you need. Following our example in step 1, you might include the EDI Documents Processed in TimeSeries portlet and the Business Process Search portlet. To review descriptions of the available portlets, see *Portlet Descriptions*.
3. Arrange the portlets in your panes as you prefer. For instructions, see *Add Portlets to a Pane*, *Arrange Portlets on Panes*, and *Delete Portlets from a Pane*, as needed.
4. Customize the portlets to differentiate them by color, style, and contents as befits your needs. For the procedure, see *Customize Portlets*. For information about customizable fields in individual portlets, see *Portlet Descriptions*.
5. Configure your Sterling B2B Integrator system and run processes, so that the portlets have data to display.

Customize Portlets

Before you begin

You can customize portlets with regard to format, content, and title. For example, you can change the color of charts in a portlet or indicate the IP address of computers to be searched for data.

For a list of portlet descriptions including the fields within them that you can customize, see *Portlet Descriptions*.

About this task

To customize a portlet:

Procedure

1. In the pane containing the portlet you want to customize, click the pencil icon in the upper right corner of the portlet banner.
2. In the Customize portlet page, make any changes to the appropriate fields.
3. Click **Update** to apply the changes to the portlet. The pane refreshes, displaying the portlet with the changes applied.

Change Portlet Border Styles

About this task

To change a portlet style:

Procedure

1. From the dashboard page, click **Manage Layout**.
2. In the Customize pane page, in the listed panes area, click the name of the pane you want to change the portlet style on.
3. In the Customize pane page, from the Style list, select one of the following styles for each portlet on the page:
 - Default – colored banner and border surrounding the portlet
 - Clear Borders and Title – no banner or border surrounds the portlet.
 - Simple Tiled Style – colored banner and border surrounding the portlet
4. Click **Apply**.
5. Click **Save and Apply** to save the portlet style changes.

Add Web Links to Quick Links Portlet

About this task

To add a Web link to the Quick Links portlet:

Procedure

1. From the dashboard page, click the pencil icon in the upper-right corner of the Quick Links portlet.
2. In the Customize portlet page, type the URL for the Web link in one of the URL fields.
3. In the Name field directly following the URL field, type the name that displays in the portlet.
4. Click **Update** to save the changes to portlet. The pane refreshes, displaying the portlet with the new link applied.

Delete Web Links from Quick Links Portlet

Before you begin

You cannot delete the following links:

- IBM
- Customer Support
- Product Updates
- Support on Demand

About this task

To delete a Web link from the Quick Links portlet:

Procedure

1. From the dashboard page, click the pencil icon in the upper-right corner of the QuickLinks portlet.
2. In the Customize portlet page, highlight the URL for the Web link you want to delete and press **Delete**.
3. In the Name field directly following the URL field, highlight the name that displays in the portlet and press **Delete**.
4. Click **Update** to save the changes to portlet.

RSS Feed Portlet Channels

You can add news feeds to your dashboards to keep up to date on different topics related to your job.

To do this, you use an RSS Feed. RSS, is short for RDF Site Summary or Rich Site Summary (commonly called Really Simple Syndication), is an XML format for syndicating Web content. A Web site that allows other sites to publish some of its content creates an RSS document and registers the document with an RSS publisher. The document may contain news feeds, events listings, news stories, headlines, project updates, excerpts from discussion forums or even corporate information.

Sterling B2B Integrator can read RSS-distributed content and display it in the RSS Feed portlet.

You can add as many RSS Feed portlets as you want to a dashboard, as each RSS Feed portlet is configured for one URL (the source of the document).

Before you can display an RSS Feed portlet, you must have:

- Internet access through the computer that Sterling B2B Integrator is installed on.
- RSS URL from the Web site you want to pull content from.

Note: You can obtain the RSS URL from Web sites by pointing your Web browser to the Web site and locating the RSS feeds information. This may be an XML link. You can open the link in your Web browser and copy the RSS URL from the Web browser address field.

For more information about configuring your RSS Feed portlet, see *RSS Feed Portlet*.

Add Channels to an RSS Feed

About this task

To add channels to an RSS Feed portlet:

Procedure

1. From the dashboard page, click the pencil icon in the upper-right corner of the RSS Feed portlet.
2. In the Customize portlet page, in the URL field:

- a. Highlight the URL for the Web link and press **Delete**.
 - b. Type the RSS URL you obtained from the Web site you are pulling content from. If you enter an invalid URL or the URL can not be resolved, Sterling B2B Integrator uses the default value (/index.xml), which displays the sample feed instructions in the portlet.
3. Click **Update** to save the changes to portlet.

Results

The dashboard refreshes showing the changes to the portlet. You can now click a link in the portlet and view the article.

Use Portlets to Perform Specific Searches

If you are running the Sterling B2B Integrator Community Management application, several available dashboard portlets enable you to perform specific searches, such as searching for business processes or documents, and Internet searches.

To optimize performance when searching for documents from dashboard portlets, the **useNewCorrelationSearch** property value (located in the **cssearch.properties** file in the Sterling B2B Integrator Properties directory) has a default value of **True**. This property value must be set to True to use this functionality and to continue receiving the performance enhancements.

Portlet descriptions

These portlet descriptions can help you determine which portlets to include in your dashboard interface and to reference fields in the portlet that you can customize.

The portlet selections are designed to enable you to put the data you most frequently seek in your day-to-day use of Sterling B2B Integrator at your fingertips in an easily-accessible, visually helpful way. Review the available portlet descriptions for details about their uses and how you can customize their appearance or content.

Each portlet topic describes a portlet and indicates any customizable fields for that portlet. Because your Administrator may have limited the portlets available in your personal dashboard according to your role, not all of the portlets may be available for you to include in your interface display.

Administration Management Console Portlet

The Administration Management Console portlet enables access to the Sterling B2B Integrator features you use to configure most operations and to run processes. This portlet comprises the content of the preconfigured Admin Console pane.

The menu items displayed on the Administration Menu within this portlet are determined by the user account permissions set for you by your system administrator.

The Administration Management Console portlet is large, taking up an entire frame. You can include it on a pane with other portlets, but for easier navigation and viewing, configure the Administration Management Console portlet in its own pane.

If you add additional portlets to a pane with the Administration Management Console portlet, you may need to scroll to the right or down to see the portlets.

Customizable Fields:

- Title – You can modify the name of the portlet that displays in the banner.

Advanced File Transfer Management Portlet

The Advanced File Transfer Management portlet displays the AFT Suite home page, enabling you to create and manage AFT communities and monitor routing activities.

This portlet comprises the preconfigured Advanced File Transfer pane, and is available only if you have an installed license for the AFT Suite.

This portlet is large, taking up an entire pane. You can include it on a pane with other portlets, but for easier navigation and viewing, configure the portlet in its own pane.

If you add additional portlets to a pane with the Advanced File Transfer Management portlet, you may need to scroll to the right or down to see the portlets.

Customizable Fields:

- Title – You can customize the name of the portlet that displays in the banner.

Business Process Search Portlet

The Business Process Search portlet enables you to search for business processes in Sterling B2B Integrator. To use the search, type the name or partial name of a business process in the field, and click Search. Sterling B2B Integrator displays the search results in a new window, displaying the Business Process Manager page.

Customizable Fields:

- Title – You can modify the name of the portlet that displays in the banner.
- Hostname – Enter the name or the IP address of the computer on which to search for business processes.
- Port – Enter the port number of the Sterling B2B Integrator installation on which you want to search for business processes.

Cache Statistics Portlet

The Cache Statistics portlet displays statistics, in graph format, about either the size of business process data that is processing (in kilobytes) or the cache usage related to business processes running in Sterling Integrator.

Click the graph to view the Business Process Queue Usage page in a new window, showing memory and disk cache usage and queue priority statistics in addition to the cache statistics illustrated in this portlet.

Customizable Fields:

- Title – You can modify the name of the portlet that displays in the banner.
- Select App Server Name – Application server name of the Sterling Integrator installation. Sterling B2B Integrator dynamically populates the selections with your application server name.
- Select Cache Statistics Type – Choose the type of cache statistics to display in the portlet (Business Process Data Size or Cache Processing).

Cache Usage Portlet

The Cache Usage portlet displays a pie chart showing the amount of free and used memory or disk cache (you can change the value to be **Memory** or **Disk**).

Use this portlet to monitor memory or disk cache usage; you can click the graph for more information, including the counts, number of requests, and number of successful hits.

Customizable Fields:

- Title – You can modify the name of the portlet that displays in the banner.
- Select App Server Name – Application server name of the Sterling B2B Integrator installation. Sterling B2B Integrator dynamically populates the selections with your application server name.
- Select Cache Usage Type – Choose the type of cache usage to monitor in the portlet (**Memory** or **Disk**).

Database Usage Portlet

The Database Usage portlet displays a chart showing the amount of database capacity being used (in MB). Click Refresh at any time to update the data.

Note: If you are using DB2, There are specific permissions required for the ID that is used to query the database. If you do not add these permissions, the system cannot access the usage data needed to create the graph.

The DB2 call used to get the database usage information, GET_DBSIZE_INFO, requires the user to have SYSMON authority and EXECUTE privilege on the GET_DBSIZE_INFO procedure.

Use this syntax:

```
usermod -a -G group user
```

where *group* and *user* are the individual permissions required.

DB Access Test Portlet

The DB Access Test portlet links to a script that runs to show how efficiently Sterling B2B Integrator is accessing the database. The results show the average insert time in milliseconds, the number of inserts completed, and the insert size.

Customizable Fields:

- Title – You can modify the name of the portlet that displays in the banner.

Document Search Portlet

The Document Search portlet enables you to quickly search for documents in Sterling Integrator processes.

Customizable Fields:

- Title – You can modify the name of the portlet that displays in the banner.
- Hostname – Enter the name or IP address of the computer to search for documents on.
- Port – Enter the port number of the Sterling B2B Integrator installation you want to search for documents on.

Note: To optimize performance when searching for documents from dashboard portlets, the *useNewCorrelationSearch* property value (located in the *jdbc.properties* file in the Sterling B2B Integrator Properties directory) has a default value of **True**. This property value must be set to True to use this functionality.

Document Tracking Portlet

The Document Tracking portlet enables you to easily track document progress in Sterling B2B Integrator.

Enter parameters in the provided document description fields and click Go! to track a document.

Customizable Fields:

- Title – You can modify the name of the portlet that displays in the banner.

Documents Processed in Barchart Portlet

The Documents Processed in Barchart portlet displays a bar chart graph showing the number of documents processed over a selected time period, with data points on the bar chart. Click Refresh at any time to update the data.

Click the bars for more detailed data about the documents processed.

You can use this portlet to reflect all EDI document processing, or limit the display to document processing related to a specific EDI ID. Another way to use the portlet is to add multiple copies of the portlet, using separate Documents Processed in Barchart portlets for different EDI IDs.

Customizable Fields:

- Title – You can modify the name of the portlet that displays in the banner.
- Select Chart Color – Choose the color of the chart to display in the portlet (red, green, blue, and yellow). This provides a visual way for you to differentiate multiple copies of the portlet in a single pane.
- Select Date Range – Select the time interval for displaying processed documents (today, last 7 days, last 31 days, or this year).
- Select Document Direction – Select the direction of the documents processed. The default value is All. Sterling B2B Integrator populates the selections dynamically, to include Inbound and Outbound depending on your configured documents.

- Select Document Type – Type of documents processed. The default value is All. Sterling B2B Integrator populates the selections dynamically, to include document types you have configured.
- Select EDIID – Select the EDI ID associated with documents processed to be displayed in this portlet. The default value is All. Sterling B2B Integrator populates the selections dynamically, to include the EDI IDs you have configured.

EDI Documents Processed in TimeSeries Portlet

The EDI Documents Processed in TimeSeries portlet displays a line graph showing the number of documents processed during a selected time period, with data points in a timeline format. Click Refresh at any time to update the data.

Click the data points for more detailed data about the documents processed.

You can use this portlet to reflect all EDI document processing, or limit the display to document processing related to a specific EDI ID. Another way to use the portlet is to add multiple copies of the portlet, using separate copies of the EDI Documents Processed in TimeSeries portlet for different EDI IDs.

Customizable Fields:

- Title – You can modify the name of the portlet that displays in the banner.
- Select Chart Color – Choose the color of the chart to display in the portlet (red, green, blue, and yellow). This provides a visual way for you to differentiate multiple copies of the portlet in a single pane.
- Select Date Range – Select the time interval for displaying documents processed (today, last seven days, last 31 days, this year). Last seven days is the default value.
- Select Document Direction – Select the direction of the documents processed. The default value is All. Sterling B2B Integrator populates the selections dynamically, to include Inbound and Outbound, depending on your configured documents.
- Select Document Type – Select the type of documents processed to be displayed in this portlet. The default value is All. Sterling B2B Integrator populates the selections dynamically, to include document types you have configured.
- Select EDIID – Select the EDI ID associated with documents processed to be displayed in this portlet. The default value is All. Sterling B2B Integrator populates the selections dynamically, to include the EDI IDs you have configured.

Enhanced System Log Files Portlet

The Enhanced System Log Files portlet displays log entries for a specific log you choose. You must add one Enhance System Log File portlet for each log that you want to view through the dashboard.

For example, if you want to view the archive log and the business execution log, you must add an Enhanced System Log Portlet for each, and select the log file to view in each portlet. The title of the portlet automatically changes to indicate the log file being displayed.

Customizable Fields:

- Title – You can modify the name of the portlet that displays in the banner.
- Select Display Height – You can enlarge or reduce the portlet display size in the pane. Default height is 140 pixels.
- Select Log File – Specify the Sterling B2B Integrator log file contents to view in the portlet.

Environment Pool Usage Portlet

The Environment Pool Usage portlet displays a graph showing pool statistics for a pool that you specify. You can click the graph for more detailed information about all of the pools in use. You can add multiple Environment Pool Usage portlets to display data for additional environment pools.

Customizable Fields:

- Title – You can modify the name of the portlet that displays in the banner.
- Select Pool Name – Select the name of the pool for which to display usage statistics in the portlet. Sterling B2B Integrator dynamically populates selections according to your local configuration.

Event Viewer Portlet

The Event Viewer portlet displays real-time information about the most recent 50 events within Sterling B2B Integrator. When the 51st event displays in the Event Viewer, the oldest event in the viewer drops off the list.

Events are any actions that occur within the system that are configured to generate event data. Events can include document tracking status changes, adapters starting and stopping, business process status or state changes, and errors and exceptions.

For each event, a separate table displays within the portlet, showing information specific to the event. The Event Viewer refreshes every few seconds to display the most current 50 events. You cannot turn off the Event Viewer, but you can hide it by deleting the Event Viewer portlet from your dashboard pane display.

You can customize the number of events and type of events displayed. For information, see *Customizing Event Viewer Properties*.

Note: The information in the Event Viewer is not historical or logged in any location, however, you can configure Sterling B2B Integrator to log the events in addition to displaying them here. If you need to monitor your system's performance and health, use the log files and monitoring tools available in Sterling B2B Integrator.

Customizable Fields:

- Title – You can modify the name of the portlet that displays in the banner.
- Select Display Height – You can enlarge or reduce the portlet display size in the pane. The default is 140 pixels.

Customize Event Viewer Properties Before you begin

You can configure the Event Viewer portlet in the following ways:

- Change the number of events displayed to be different than the default setting of 50
- Filter the events so that only specific events display

About this task

To customize the portlet contents, you edit properties in the `event-listeners-common.properties` file in the `install_dir/properties` directory. To edit the event viewer properties:

Procedure

1. In the `install_dir/properties` directory, locate the `event-listeners-common.properties.in` file.
2. Locate the Event Viewer Listener section of the file.
3. In the `listener.event.viewer.size.limit` property, change the value from 50 to the number of events you want to display in the viewer. For example, if you want only 25 events to display in the event viewer, change the value of 50 to 25.

Note: Do not make the number of events too large, as the events are stored in the JVM. Having too many events stored in the JVM may cause out-of-memory errors to occur or slow processing of other components in Sterling B2B Integrator.

4. In the `listener.event.viewer.events.list` property, change the value to include the events you want to display in the viewer. Separate each event with a comma (.). The default value is blank, which displays all events in the event viewer. For example, if you want to display the exceptions document statuses, you would type `Workflow.DocEvent.DOCSTATUS.3`. For more events, see the different event schema properties files in the `install_dir/properties` directory.
5. Save the `event-listeners-common.properties.in` file under the same name and in the same location.
6. Stop Sterling B2B Integrator.
7. In the `install_dir/bin` directory, complete one of the following actions depending on your operating system:
 - UNIX or Linux - Run `setupfiles.sh`
 - Windows - Run `setupfiles.cmd`
8. Start Sterling B2B Integrator.

Results

The changes are applied and you can now view your changes in the Event Viewer portlet in your dashboard.

Queue Priority Statistics Portlet

The Queue Priority Statistics portlet displays a graph showing the average wait time for each queue, by queue priority. You can click the graph for more detailed information about the business process queue usage.

Customizable Fields:

- Title – You can modify the name of the portlet that displays in the banner.

- Select App Server Name – Select the application server name of the Sterling B2B Integrator installation for this queue. Selections are dynamically populated based on your local configuration.
- Select Queue Priority Statistics Type – Select the type of statistics to display in the portlet (Average Wait Time, Average BP Execution Cycle Time, or Priority Depth).

Quick Links Portlet

The Quick Links portlet displays links to frequently visited Web sites. You can add up to five sites in addition to the following supplied links, which you cannot delete or edit:

- IBM– IBM corporate Web site
- Customer Support – IBM customer support site
- Product Updates – Site showing product updates and patches for IBM products
- Support on Demand – Self-serve support site for IBM products

For instructions regarding using this portlet, see *Add and Delete Web Links in the Quick Links Portlet*.

Customizable Fields:

- Title – You can modify the name of the portlet that displays in the banner.
- URL 1 through 5 – Enter Web site addresses for the respective name to link to.
- Name 1 through 5 – Enter the names that display in the portlet for the links to the respective URL number.

RSS Feed Portlet

The RSS Feed portlet displays a news feed from a specified Web site. Really Simple Syndication (RSS) is an XML format used for distribution Web content, such as news feeds.

For more information and instructions regarding this portlet, see *Add Channels to an RSS Feed Portlet*.

Customizable Fields:

- Title – You can modify the name of the portlet that displays in the banner.
- itemdisplayed – Enter the number of items to display in the portlet. Default is 5.
- openingpopup – Specify whether to display the news feed in the separate popup window. Default is true.
- Show item description – Specify whether to display a description for the item. Default is true.
- Show text input – Specify whether to display input text. Default is true. Text input is an optional element in an RSS feed; most feeds do not use text input.
- Show title description – Specify whether to display a title description. Default is true. RSS feeds include a title description, and some include an icon and additional descriptive information. If you select **false**, only the title displays in the portlet.
- stylesheet fields (stylesheet, stylesheet.text/html, and stylesheet.text/vnd.wap.wml) – These define the format of content in the portlet. The default values specify preconfigured stylesheets provided for this portlet for your convenience.

You can create new stylesheets and replace the default values with the values for your own stylesheets.

- URL – Enter the RSS URL from the Web site you want to pull content from. The default value is /index.xml, which displays the instructions displayed in the portlet before you customize it (the instructions are sample feed).

System Alert Portlet

The System Alert portlet displays system alerts and notices sent to you. The alerts may originate from Sterling B2B Integrator, as in the case of a system failure, or from an administrator.

Customizable Fields:

- Title – You can modify the name of the portlet that displays in the banner.
- Select Display Height – You can enlarge or reduce the portlet display size in the pane. Default is 140 pixels.
- Select Display Range – Select the time period for which to display alerts in the portlet (**last 15 minutes, last 30 minutes, last 60 minutes, last day, All**).

Web Search Portlet

The Web Search portlet enables you to perform Internet searches from within your dashboard, using the Yahoo® search engine.

When you enter a word or phrase and click **Search**, the search results display in a new window.

Customizable Fields:

- Title – You can modify the name of the portlet that displays in the banner.

Web View Portlet

The Web View portlet displays a URL or any Web-based application in a portlet.

This portlet is large, taking up an entire pane. You can include it on a pane with other portlets, but for easier navigation and viewing, configure the Web Viewer in its own pane.

If you add additional portlets to a pane containing the Web Viewer, you may need to scroll to the right or down to see the portlets.

Customizable Fields:

- Title – You can modify the name of the portlet that displays in the banner.
- Height – You can enlarge or reduce the height of the portlet in pixels. Default is 480.
- Width – You can enlarge or reduce the width of the portlet in pixels. Default is 640.
- Source – Enter the URL of the page to display in the portlet.
- Frameborder – Indicate whether to display a frame border around the portlet. Default is true.

Web View Plus Portlet

The Web View Plus portlet displays a copy of Sterling B2B Integrator inside a portlet. This feature enables you to quickly switch from using a test environment to a production environment from within a single interface.

This portlet is large, taking up an entire pane. You can include it on a pane with other portlets, but for easier navigation and viewing, configure the Web View Plus portlet in its own pane.

If you add additional portlets to a pane with the Web View Plus portlet, you may need to scroll to the right or down to see the portlets.

Customizable Fields:

- Title – You can modify the name of the portlet that displays in the banner.
- Hostname – Enter the name of IP address of the computer where the copy of Sterling B2B Integrator is installed that you want to display in the portlet.
- Port – enter the port number of the Sterling B2B Integrator installation you want to display in the portlet.

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