
Creating a Test Portal with a New Instance (v4.2)

- **Article Type:** General
 - **Product:** MetaLib
 - **Product Version:** 4
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Description:

What steps are required to create a new portal as a test portal in a new instance?

It will not need to be on the main portal list, since end users will not be able to see it. Staff will have direct access only.

Resolution:

Create a New Test Portal

Create the Portal using the Portal Administration option of the Management Interface (/M). Three default users are automatically created for the portal. The process described will also copy all Quicksets and Categories to the new portal. However, since there is no way to sync the new test portal with the production portal, in the future, if new categories are desired in both portals, they will need to be added manually.

On the other hand, UTIL-K-4, the Copy QuickSets Utility, will allow the system administrator to copy QuickSets between users of the same institution. If the target users have their own Quicksets, these QuickSets will be replaced by the QuickSets that were copied from the source user.

1. Log in to the Management Interface as Institutional or Group Administrator of the institution.
2. From the main menu of the /M interface, click Portal Administration.
3. Click Add Portal.
4. Fill in the required fields in both the New Portal Details section and the Copy from section.

New Portal Details

Institution Name: From the drop-down list, select the name of the institution to which to add the portal.

Portal Name: Type the name of the new portal (30 character max, A-Z, 1-9, hyphen can be used). DO NOT use special characters or spaces in the portal name.

Instance: From the drop-down list, select an existing instance to which to add the portal. In this case, select "OTHER"

After you select "OTHER", a new field will appear "New Instance". Enter the new instance name (you can still double-check the names of existing instances in the "Instance" dropdown box).

Copy from:

Institution Name: From the drop-down list, select the Institution Name which contains the portal to be copied.

Portal Name: From the drop-down list, select the Portal Name from which to copy the new portal. Since the portal you are copying belongs to the same institution as the source institution, the category display list and QuickSets of that portal are copied to the three default new users of the new portal.

5. Click Submit. "Copy Portal in progress..." will appear at the top of the screen to show that the process has begun. Do not click Submit while portal creation is in progress.

Upon completion, the following message is displayed: "Portal successfully created."

6. Verify that three new default users have been created for the new portal. To access the list of users, click Main Menu in the navigation bar and select List of Users from the MetaLib Administration menu on the right. Browse or search the list to find the users.

7. Defining Portals for Guest Users. In addition to the IP ranges, portals are defined in vir00/dt/default_z312 to enable users to 'Change Portals' in the user interface.

```
!ip-from ip-to default user id default user institute
!!!!!!!!!!!!-!!!!!!!!!!!!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!
123450000000 123459999999 CITYUNIV-ENG-IN CITYUNIV
000000000000 999999999999 CITYUNIV—ENG-GUEST CITYUNIV
CITYUNIV CITYUNIV-ENG-GUEST CITYUNIV
MEDICAL MEDICAL-ENG-GUEST CITYUNIV
LAW LAW-ENG-GUEST CITYUNIV
TEST UNIVTEST-ENG-GUEST CITYUNIV
```

8. Next, in the /M interface, add a staff user for this portal, since all previously created users point at the Production Portal. In the "Add New User" screen, first change the "Portal Name" field using the dropdown, because this action will erase the content of all other fields.

9. You will probably also want to add the shortcut to the www files directory (www_v_eng) in /exlibris/metalib/m4_3/alephm/prof_master for example,
alias ww3 'cd \$ins03_dev/ins03/www_v_eng'

This completes the new Test Portal setup. The link for direct access to the new portal should look like this:
<http://yourorganization.edu:8331/V?func=meta-1&institute=CITYUNIV&portal-name=UNIVTEST>

• **Article last edited:** 10/8/2013