

PortalProdigy Profiles Guide

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What are Profiles?

A Profile is a collection of settings that instruct PortalProdigy how to build a web page. Each Profile specifies a set of templates (Page, Header, Footer, and Feature), color schema, widget collections, and SEO settings needed to create a page.

Benefits of Profiles:

Profiles automate the process of applying settings to multiple pages of your website. This saves you time up front and makes maintenance a breeze. Profiles also enable consistency in design and functionality which improves the end user experience.

Profiles also allow you to pre-configure changes and apply them later. E.g. let's say you want to dress up your website for the Christmas holiday. You can define a Profile with the holiday theme, apply it for the duration of the holiday and revert back to your standard Profile when the holiday has ended. You can do this for holidays, special occasions, promotions, seasons, etc.

Profile Inheritance:

When you create a new Profile you can inherit the settings from another Profile and override just the settings that you want to make unique in the new Profile. Since most of the time you will only need to override a few settings, inheritance saves you time creating new Profiles. When you make changes to a parent Profile all of its children inherit the changes; saving you even more time.

PortalProdigy offers three levels of inheritance:

- 1) Site Settings
- 2) Page Type Default
- 3) Specified Profile

Site Settings is the top level Profile for your website. At the next level we have Page Type Default Profiles. Each Page Type has a default Profile. By default Page Type Default Profiles inherit Site Settings. If you are wondering why we have a Profile for each Page Type the primary reason is that each Page Type requires a Feature Template which is unique to the Page Type. For example a Browse Events Page Type requires a different template than a Product Detail Page

Type. The secondary reason is that it is very common to need to change other settings at the Page Type Level. For example if you want to use a Product Filter Widget you must place it in a side bar collection used by your Product Catalog pages. Understandably, the Product Catalog Page Type is the only Page Type that can use the Product Filter Widget, consequently you would not want it to be included in the side bar collection of other Page Types. Being able to specify this at the Page Type Default Level solves this problem.

At the next level we have Specified Profiles for Page Type records. Each Page Type record by default uses its Page Type Default Profile. You can override this with a Specified Profile. An example of a Page Type record is a Product Item record. By default all Product Item records use the Product Detail Page Type Default Profile, but you can override this for each Product Item and specify a different Profile.

How to Create and Use Profiles:

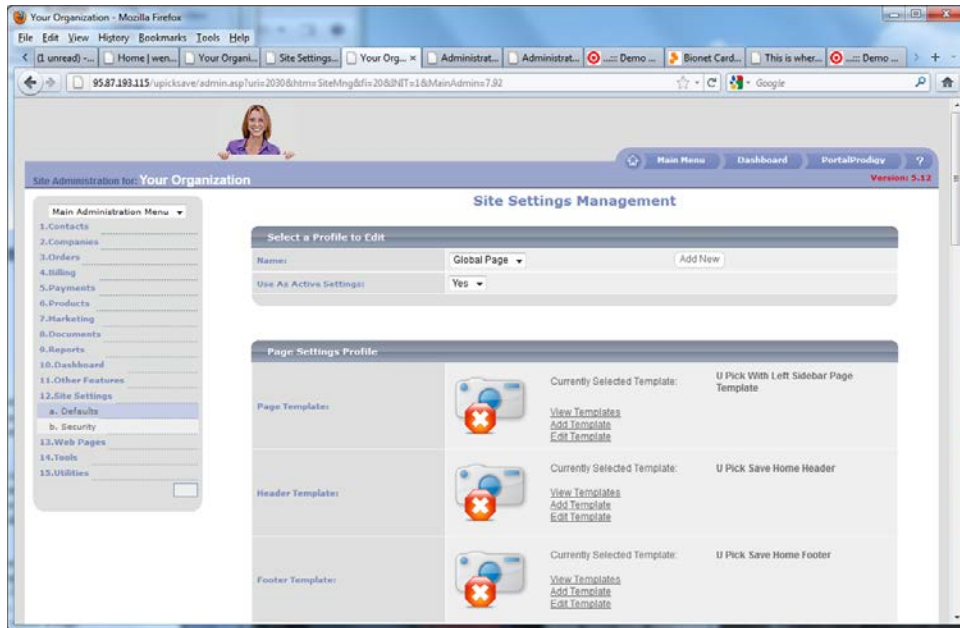
Profiles are created using Page Manager.

Online help explaining each of the settings for Page Manager is available from Page Manager by clicking on the ? located in the upper right corner of the page. Online help is available for many features and we are continuously adding it for additional features. If online is not available for a particular feature, see the Support Center on www.portalprodigy.com or contact us for assistance.

When you create your website the first thing you should do is configure Site Settings. Site Settings provide a generic Profile for all other Profiles to inherit. Site Settings are configured using Site Settings Management, a specialized version of Page Manager. Site Settings are global in scope and do not apply to a specific Page Type.

Site Settings Management screen:

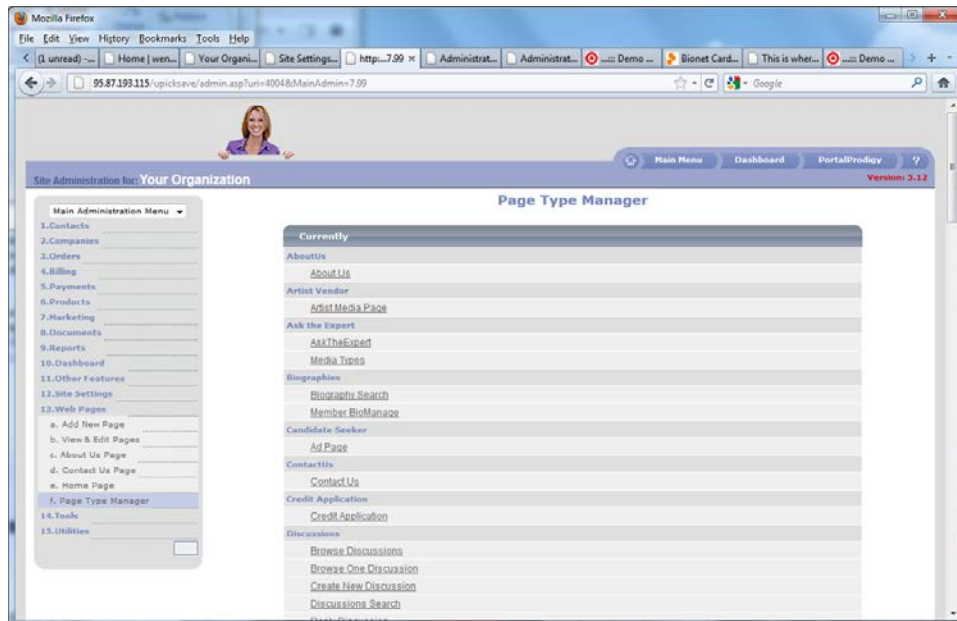
Profiles Guide



Your Site Settings default to a pre-defined Profile named “Global Page”. If you make changes to Site Settings and save them without creating a new profile, the settings will be saved as the “Global Page” Profile. You may choose to add a new Profile and assign your own name to it. To activate your new Site Settings Profile set Use as Active Settings to “Yes” and all pages that are set to use the Site Settings will automatically use your new Profile.

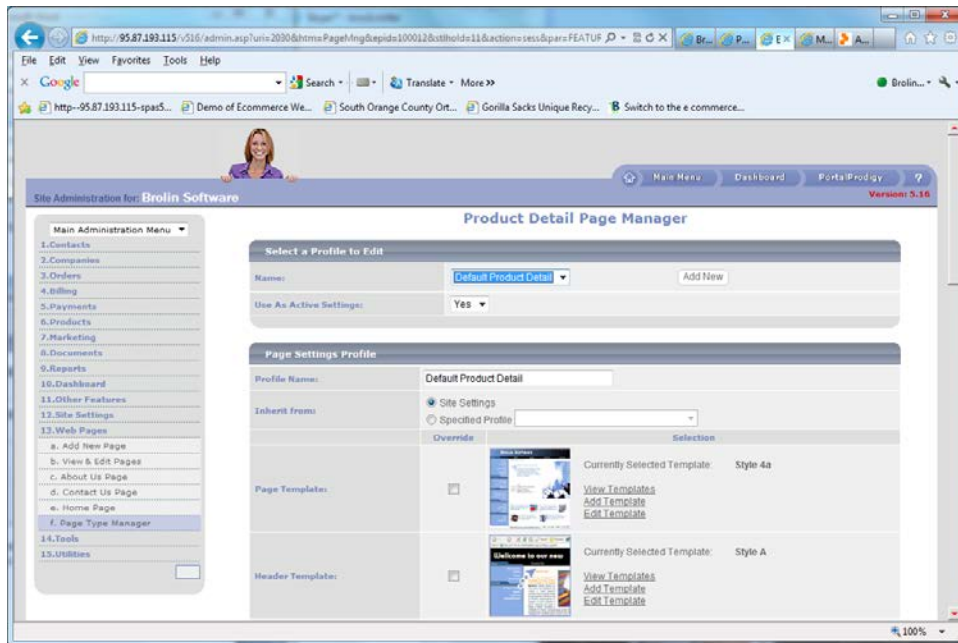
Because Site Settings are generic, Site Settings Management does not include a few settings that the other Page Manager pages include such as a Feature Content Template and Main Content Collection because these are Page Type specific. To set a default Main Content Template and Main Content Collection for each Page Type, PortalProdigy provides a tool named Page Type Manager.

Page Type Manager screen:



Using Page Type Manager you can define a default Profile for each Page Type. By default each Page Type will inherit the Profile assigned as the active settings in Site Settings Management. Click on the Page Type you want to edit such as Product Detail Page. It will open the Product Detail Page Default Profile in Page Manager as shown in the picture below.

Product Detail Page Type Profile screen:



If the Profile Name is set to “Global Content Page” you must first create a new profile before proceeding. You do this by clicking Save As, enter a Profile Name in the pop-up dialog box, and click Ok to save it. Next set Use as Active Settings to “Yes” to make it the default Profile for the Page Type. Once this is done you may check the Override checkbox for any of the settings, change them, then save the Profile. When saved it becomes the default profile for that Feature Component. To create additional profiles without changing the default, simply leave Use As Active Setting set to “No”.

Each feature’s management page provides an option to specify a Profile. Examples of this are Document Management, Events Management, and Item Management. If you just want to specify SEO values, use the SEO section in the management page rather than changing the Profile. The values you enter in the SEO section of the management page will automatically override the values in the Specified Profile. You may also import SEO values for products using SEO Product Import. When you import SEO values they will be displayed in the SEO section in the management page, not in the Profile.

As of PortalProdigy version 4.10 Profile names must be unique. Previous versions allowed and in many cases automatically created duplicate names. We have changed this so that going forward duplicates cannot be created. Existing duplicates should be manually deleted using Page Manager’s Delete option.

Profiles Guide

Item Management screen:

Site Administration for Brolin Software

Item Management

Page Settings Profile

User: ☐ Page Type Default Settings ☐ Specified Profile

SEO Settings

Item Description

Features:

Type:

Item ID: 1017

Product Description

Product Name:

Product Code:

Pricing Method:

Sales Price:

List Price:

Click on the SEO Settings section heading to expand the section. It will be shown as in the following picture. Clicking on the SEO Settings section again will contract it.

Item Management screen – SEO section:

Site Administration for Brolin Software

Item Management

Page Settings Profile

User: ☐ Page Type Default Settings ☐ Specified Profile

SEO Settings

Page Title:

Meta Tag Description:

Meta Tag Keywords:

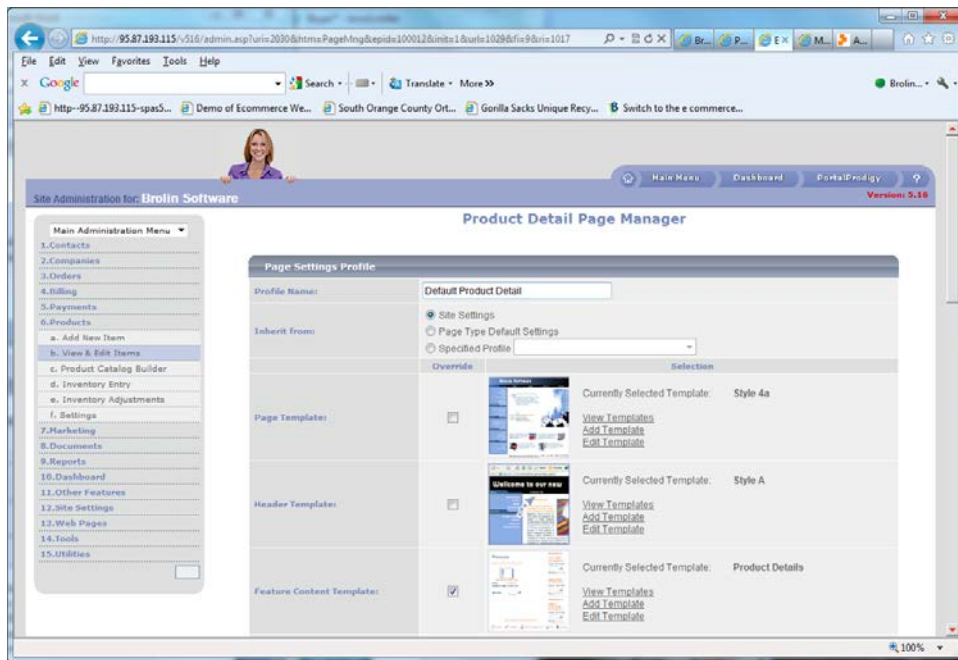
Script:

Human Readable URL:

To edit the selected Profile as indicated by the Use option, click on Page Manager. Page

Manager will be displayed as shown in the picture below. You may edit the name of the Profile and change any of the settings. One thing to keep in mind is that anytime you edit an existing Profile, all pages that use that Profile will inherit the changes.

Product Detail Page Manager screen:



As a reminder: If you want to specify SEO values for Page Title, Meta Tag Description and Keywords, and Human Readable URL it is recommended that you do this for each record in the feature management page (e.g. Item Management) and not in the Profile. Only specify SEO values in the Profile when you want all records using the Profile to share the same specified values. Scripts, such as a Google Tracking Script, are commonly shared; although you can specify them for each record.

PortalProdigy includes predefined Profiles for the following:

- Default Comparable Product Details
- Default Menu Builder
- Default Membership Dues
- Default Member Directories Browse
- Default View Listing
- Default Add Update Listing
- Default Browse Own Listings

- [Default Search Listings](#)
- [Default Product Detail](#)
- [Default Browse One Discussion](#)
- [Default Events Registration](#)
- [Default Product Catalog](#)
- [Default Survey Form](#)
- [Default Browse One Event](#)
- [Default Create New Discussion](#)
- [Default Browse One News](#)
- [Default Search Documents](#)
- [Default Browse Documents](#)
- [Default Browse Categories](#)
- [Default Document Page](#)