

How-to Guide
SAP NetWeaver '04



Portal Content Structuring Guidelines

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Applicable Releases:
SAP NetWeaver '04
SAP Enterprise Portal 6.0

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1 Introduction

This document provides vendors with information required to create their own portal content as business packages for SAP Enterprise Portal 6.0 and SAP NetWeaver 04 and meet certification requirements. We recommend that you read this handbook before you start developing your business package.

Section two 'Defining Business Packages', briefly describes the semantic structures of business packages.

Section three 'Certification Criteria' contains the criteria that your content objects are tested on and the deliverables that you must submit. Please make sure that you read this section before registering your business package.

This document is intended for developers who are familiar with the SAP Enterprise Portal as well as developers who want to learn more about the concepts for business packages.

2 Defining Business Packages

Business packages are the delivery unit for portal content running on SAP Enterprise Portal. They contain pre-configured portal content structures that can easily be integrated into an existing portal infrastructure. These content structures should be developed according to the guidelines and requirements that are contained in this document. They specify how you should structure the content elements to maximize reusability of portal content and provide users with an intuitive user interface.

This section focuses on the semantic meaning of the individual content objects.

Please note that this section does not provide a detailed instruction on how to develop portal content objects. If you are interested in iView development or how to create other portal content elements from a purely technical point of view, see the SAP Enterprise Portal documentation at <http://help.sap.com> → NetWeaver, or the Portal Development Kit, which is available at www.sdn.sap.com.

2.1 Content Objects in Business Packages

The following is an overview of the portal content objects that business packages can contain. They all have a specific place in the content hierarchy and a specific semantic meaning:

Object	Semantic Meaning
iView An iView is a small program that retrieves data from content sources in a company environment and on the Internet, and displays it in the enterprise portal content area. Some iViews also allow the user to work with the data, for example, by modifying existing or creating new data units.	Workstep From a semantic point of view, an iView represents a workstep by providing access to tools, information, or applications. Example: Display Employee Data

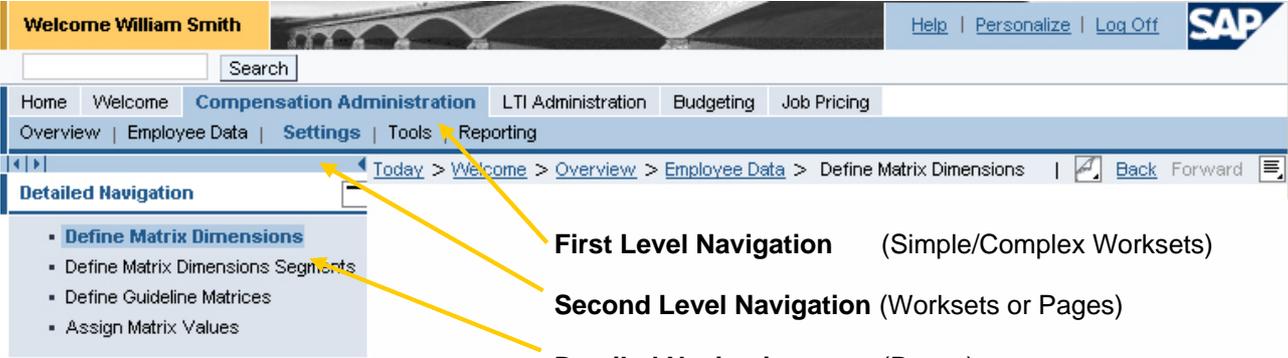
<p>Page A portal page is a container for iViews that are arranged in a layout.</p>	<p>Task iViews that support related worksteps can be grouped together on pages. The content of the pages then represent business tasks, providing the tools the user needs to fulfill such a task. Example: Salary Review</p>
<p>Simple Workset A workset that groups a set of related pages.</p>	<p>Task Area within a Business Process Pages that support a given business process can be grouped together using worksets. The workset then represents the business process. Example: Employee Appraisals</p>
<p>Complex Workset A container workset that groups several simple worksets representing several business processes.</p>	<p>Area of Responsibility Related simple worksets can be grouped together to provide the content for comprehensive areas of responsibility in a complex workset. Example: People Management</p>
<p>Role Template A portal role template is the largest semantic unit containing folder hierarchies consisting of worksets, pages, and iViews. These contain all the portal content objects that a user needs for his or her job role and determine which services the assigned users can access. They are also responsible for the visualization of content and for the navigation structure.</p>	<p>Business Role Delivered roles are based on the business role of the target group. The content of a role is structured to reflect the roles and tasks of the users it is intended to be assigned to. Business roles are usually subsets of job roles, representing, for example, only one business process or area of responsibility. Example: Line Manager</p>

2.2 Portal User Interface – Navigation Patterns

The Recommendation for portal content structures in this document also directly affect the navigation structures that the portal user who uses this content sees.

To ensure a uniform navigation concept, we recommend that you follow the structuring guidelines.

Two important means for uniform structuring of larger pieces of content are simple and complex worksets. This section briefly illustrates how the use of these objects affects the navigation structures.



The screenshot shows the SAP Compensation Administration navigation interface. The breadcrumb trail is: Today > Welcome > Overview > Employee Data > Define Matrix Dimensions. The 'Detailed Navigation' pane is open, showing a list of items: Define Matrix Dimensions (highlighted), Define Matrix Dimensions Segments, Define Guideline Matrices, and Assign Matrix Values. Three yellow arrows point from text labels to the navigation elements: 'First Level Navigation' points to the 'Settings' menu item, 'Second Level Navigation' points to the 'Define Matrix Dimensions' breadcrumb, and 'Detailed Navigation' points to the 'Detailed Navigation' pane.

First Level Navigation (Simple/Complex Worksets)

Second Level Navigation (Worksets or Pages)

Detailed Navigation (Pages)

- **Simple Worksets**

Using simple worksets only (and no complex ones) affects the top-level navigation as follows:

The simple worksets of a role make up the first-level navigation for the role.

The pages contained in a simple workset make up the second-level navigation for the role.

The tabs in the top row (Home, Welcome, Compensation Administration, etc.) are simple worksets. The tabs in the bottom row (Overview, Employee Data, Settings, etc.) are pages. The pages contain the portal content the user deals with. We recommend including an overview page as the first page (link on the very left side of the horizontal navigation). This overview page shows the most important content a user needs when he or she selects a workset.

- **Complex Worksets**

Using complex worksets affects the top-level navigation as follows:

The complex worksets of a role make up the first-level navigation for the role.

The simple worksets contained in a complex workset make up the second-level navigation for the role.

The pages contained in a simple workset make up the third-level of navigation (detailed navigation) for the role.

The tabs in the top row are complex worksets. The tabs in the bottom row are simple worksets. The entries in the detailed navigation box are pages. The pages contain the portal content the user deals with.

3 CERTIFICATION CRITERIA

This section contains the certification criteria that your content is tested on. If you choose not to certify your content, SAP nevertheless recommends that you follow the mandatory criteria closely. Please be aware that the criteria are relevant to the development of the objects and you must bear them in mind before you start creating the final version of your package.

The criteria are listed in chronological order, as you work through them in a content project. Please note that you must agree on certain criteria with SAP before development is completed. The necessary procedure details are also contained in the criteria in this document. In particular, you should note the information in the Deliverables section. Criteria that are listed in the **Rules** sections must be fulfilled for certification. Criteria that are listed in the **Recommendation** sections are not tested, but SAP nevertheless recommends that you follow them anyway.

3.1 Deliverables

Part of the certification process is the submission of the following documents and information. For the submission of the information required, SAP provides documents and templates to use. Please contact your ICC contact for more information.

3.1.1 Project Registration

Every planned business package has to provide basic data on the intended project scope. This data is reviewed by SAP and confirmed or requests for modifications are made. The data discussed is essential for the further development of the package and you should complete this step as early as possible in the development process to avoid having to make corrections later.

Rules

Every business package must be registered with SAP.
SAP checks the information submitted and this information can only be used for the business package once SAP has confirmed this.
You must adhere to the information agreed with SAP when developing content objects; you must inform SAP of any variances before certification and justify them. For example, once SAP has confirmed the technical names of objects you submitted, you are not allowed to change these names.

Shortly before the certification date, you should submit the following information:

3.1.2 Business Package Documentation

For business package certification, there are particular documentation criteria to follow. You can request the templates for business package documentation from your ICC contact person.

Rules
You must document the business package and all objects that it contains according to the documentation guidelines.
The documentation must be submitted in English only.
You must document the installation and de-installation of the business package using the Technical Description and Configuration Information template.

3.2 Development Criteria

The criteria listed in the following sections affect the development of your portal content and must be followed when creating the business package. In addition, you must comply with the information specified with SAP when registering the project.

3.2.1 Portal Platforms

Platforms to be supported by business packages are:

- SAP Enterprise Portal 6.0 SP2
- SAP NetWeaver 2004

3.2.2 Content Development Environments

For information on the technologies that you can use to develop iViews please refer to the following resources:

- Standard documentation available at <http://help.sap.com>
- SAP Portal Development Kits available at <https://www.sdn.sap.com/irj/sdn/downloads>
- SDN <https://www.sdn.sap.com/irj/sdn/index>
- SAP NetWeaver Developer's Guide available at <https://www.sdn.sap.com/irj/sdn/developersguide>

If not otherwise specified, the criteria listed below for content projects apply irrespective of the technology used.

3.2.3 Business Package Titles

The content structure that you develop is certified in the form of a business package. The following rules apply to the naming of business packages:

Rules
The business package title required must be specified on the package registration form and confirmed by SAP. The portal content must also be presented under this name on the vendor page.
The Business Package title must not name the role that the package supports.
It must not contain the term 'portal' or "NetWeaver".
It must not contain the term SAP or SAP product names.

Recommendation

- If the backend is a non SAP product, the business package title should be based on the pattern:
Business Package for <Vendor Product (=Backend System)> by <Business Package Vendor>
- If the backend system is a SAP product, use the following pattern:
Business Package for <Activity> by <Business Package Vendor>
- The part <by Business Package Vendor> may be omitted if it is identical to the product name in <Vendor Product>/<Activity>
- SAP reserves the right to request changes to this title.

3.2.4 Versioning

The business package title can contain a reference to the backend system if desired and the version should always be based on the versioning scheme such as 1.0, 2.0 etc.

Rules
If the business package title contains a reference to the backend system, the backend version becomes part of the title. Use the pattern: Business Package for <Vendor Product (=Backend System)> <Backend Version (optional)> by <Business Package Vendor> <Package Version>. Example: Business Package for SalesProduct 4.5 by BPVendor 1.0. Business Package for SalesProduct by BPVendor 1.0.
If the business package title doesn't contain a reference to a backend system, but to, for example, an activity, the versioning is the same as described as above. Use pattern: Business Package for <Activity> by <Business Package Vendor> <Package Version>. Example: Business Package for SalesActivity by BPVendor 1.0.

3.2.5 Project Namespaces

Third-party portal content objects must comply with the SAP naming conventions for technical namespaces of portal content.

The general namespace used for SAP Enterprise Portal is:

→ **domainidentifier.companyID.pct.projectID**

Example: com.yourcompany.pct.lists

The *domainidentifier* and *companyID* identify the object as belonging to a specific company namespace.

To reflect that an object is portal content, the abbreviation *pct* has to be used in the namespace.

The *projectID* is used to identify objects that belong to a single project such as a business package.

All objects or content elements that are contained in a business package share the namespace prefix of this project:

→ **domainidentifier.companyID.pct.projectID.objectID**

Example: com.yourcompany.pct.lists.myevents

The technical name in this example could point to the *myevents* iView within the Lists project.

Rules
You must establish a unique namespace prefix for the technical names of all content objects in a business package.
You must use this prefix for all content objects in the business package.
The business package must not contain any objects from another namespace.
The namespace prefix must be based on the pattern <i>com.companyID.pct.projectID</i> .
<i>com.sap.pct</i> (constant) is reserved for all content objects developed by SAP and cannot be used by external development projects.
Note that it is the vendor's responsibility to ensure that the namespace used is exclusively available for their use.
<i>projectID</i> is a unique ID representing the development unit owning the respective content objects. The vendor is free to refine the namespace by adding more parts to the name prefix (example: <i>com.companyID.pct.hcm.payroll</i>).
Length of technical names: The technical names of all objects must not exceed 40 characters.
SAP brand and product names may not be used as part of the technical namespace or as object names.

Recommendation

- You should use the namespace prefix for one business package only. If a vendor develops more than one business package, the business packages should all use the prefix *com.companyID.pct* but use different *projectIDs* for the content objects contained in each business package. This does not apply to updates of a business package. In this case, you should use the *projectID* for the previous release of the business package.
- Case sensitivity: All technical names for portal content objects should be in lowercase.

3.2.6 System Names

Some iView types need system names to specify which back-end system is accessed. The system landscape describes all the component systems that are connected to the portal which are represented by a system name (= system alias).

To achieve a homogeneous naming structure, all system names must be released by SAP and follow a specific naming convention that results in names such as *SAP_CRM* (or generally: *BackendVendorName_ProductName_DetailedProductName*).

Rules
You must register the system names used by a business package during package registration.
System names consist of the following characters only: '0'-'9','a'-'z','A'-'Z','_','.'

The naming convention is
<BackendVendorName>_<ProductName>_<DetailedProductName>.
 A system name consists of the back-end system vendor name, the product name (special product line), and, if necessary, a detailed product name, all separated by an underscore ('_'). If names are specified by two or more terms, each term must start with a capital letter, for example, SolutionManager.

3.2.7 Content Structure

The structure of content objects must be similar across all business packages – to simplify portal content administration for customers.

Rules			
Roles consist only of worksets (either complex or simple worksets, depending on package type – see table below).			
Complex worksets consist only of simple worksets.			
Simple worksets consist only of pages.			
A business package must be of one of the following package types that determine the number and type of content objects that are part of it:			
	Package Type		
Content Object Type	A	B	C
Role	1..n (showcase only)	1..n (showcase only)	none
Complex Workset	1..n per role	none	none
Simple Workset	2..n per complex workset	1..n per role	none
Page	1..n per simple workset	1..n per simple workset	none
iView	1..n per page	1..n per page	1..n

You must heed the criteria listed below during the development phase of your project, when creating content objects for the business package. They are partly based on the structure or naming rules specified when you registered the business package.

3.2.8 Implementation Requirements

This certification requirement covers the modifications necessary to the portal in order to install the content objects.

Rules
Editing any SAP Enterprise Portal file is only allowed under the following circumstance: The SAP Enterprise Portal/PDK documentation requires that changes be made to achieve your implementation.
Only changes made by Admin/Config Tools are allowed. In all cases where it is necessary to edit files in the SAP Enterprise Portal installation to implement the business package, you must document the changes in detail in the Technical Configuration Guide. This is part of the business package documentation.

3.2.9 Package Delivery Formats

Once you have assembled all content elements for the package and structured them as desired, you must export them using the Export feature of the portal.

Rules
The package must not contain any enhancements or modifications to standard SAP portal components.

Development for Enterprise Portal 6.0:

- The delivered transport package file must only contain files within the namespace that has been confirmed during project registration. It must not contain any files within any other or within the SAP namespace.
- When you export the business package, use the business package folder that you created in the portal catalog according to the guidelines in section 3.2.12 to create the transport package. Do not include any of the folders above the level of your business package folder in the transport package (for example, the folders Portal Content, Content Provided by Other Vendors, Content for Specialists). Instead, select only the folder that is named <Vendor Name>: <Business Package Name>.
- You must submit the business package as an .epa or .sca file. Using the .epa or .sca file, it must be possible to import the complete package into the portal.

3.2.10 Installation and De-Installation

This section covers the installation and de-installation of the business package.

Rules

In the business package documentation, the Technical Description and Configuration Information must document in detail the installation and de-installation procedures.

If your package does not require any specific installation or un-installation procedures, you can refer to the standard SAP Enterprise Portal documentation.

The installation or de-installation of the business package must not affect the functioning of the portal or other content objects in the portal.

3.2.11 Package Structure

Portal content objects are accessible through the portal catalog. The portal catalog provides a central access point to portal content stored in the portal content directory (PCD) and the ability to store, manage, and organize the content in a structured tree hierarchy. All content objects must adhere to a common folder structure as described below. You must specify the folder name and ID when you create the content object. If one of the folders specified below does not exist in your portal installation, you must create it before creating your content objects.

The folders are arranged in a hierarchy. The IDs specified in brackets are parts of the PCD path, under which an object is stored in the Portal Content Directory and which together uniquely identify the object. The content administrator can see the folder titles in the portal catalog, which makes searching for content by category and business packages easier.

Rules

All vendor content objects in a business package must be located in the following folder hierarchy:

- Portal Content (ID: /portal_content)
- Content Provided by Other Vendors (ID: /other_vendors)

Within this folder, the business package must be located in one of the folders specified below. The **user type** assigned to the business package (Every User, Line Manager, or Specialist) during registration determines your choice. For more information on this, please see the following section on 'Package Categories'.

- End User Content (ID: /every_user)
- Content for Line Managers (ID: /line_manager)
- Content for Specialists (ID: /specialist)

For a given business package, located in one of the default folders "End User Content", "Content for Line Managers", or "Content for Specialists", the individual folder structure for each business package is as follows. You should place all content objects in your package in this folder:

- <Vendor Name>: <Business Package Name>
(ID:/business package name space)
for example, Your Company: Customer Data Management (ID:
/com.yourcompany.pct.cdm)

Please note that the words 'Business Package for', which are part of your business package title, should not be included in the title of the folder that you create in the PCD. So, in the example above, the complete title of the business package is 'Business Package for Customer Data Management' and the folder has the title 'Customer Data Management'.

In this folder, you should create a folder for each content object type that is part of your business package, for example, iViews, worksets, and role templates. Place the individual content objects in these folders accordingly:

- iViews (ID: /iviews)
- Pages (ID: /pages)
- Worksets (ID: /worksets)
- Roles (ID: /roles)
- Packages (ID: /packages)

The ID and title of each folder must be the same or very similar (for example, the title might use capital letters or spaces to improve readability).

Transporting business packages: The following folders must not be included in the transport package that contains the submitted business package (see section 3.2.10):

- Portal Content (ID: /portal_content)
 - Content Provided by Other Vendors (ID: /other_vendors)
 - End User Content (ID: /every_user)
 - Content for Line Managers (ID: /line_manager)
 - Content for Specialists (ID: /specialist)

You must create the transport package using only the content of the folder <Vendor Name>: <Business Package Name>. The individual objects that you export contain enough information to be located correctly in the Portal Catalog during import.

Using existing folders and creating new folders: If the folder structure is not already available in the initial content of your portal installation (depending on the release you are using), you need to create the hierarchy underneath the folder *Portal Content* yourself.

The following folder is available as standard in **all** releases:

- Portal Content (ID: /portal_content)

The vendor must create all folders below this folder during development of the business package and before the transport package is created. It is very important that the exact titles and IDs as specified below are used!

- Content Provided by Other Vendors (ID: /other_vendors)
 - End User Content (ID: /every_user)
 - Content for Line Managers (ID: /line_manager)
 - Content for Specialists (ID: /specialist)

However, please remember to exclude these folders from the transport package even if you have created them yourself!

3.2.12 Package Categories

This section explains how you can determine the exact PCD folder location that your business package has to be placed in. This depends on the package category that the business package content belongs to:

Rules
Each business package must be assigned to one of the following categories: <ul style="list-style-type: none">• The user type: Every User, Managers, or Specialists To decide, which user type your package belongs to, please answer the following questions: <ul style="list-style-type: none">• Is the content of your business package relevant to some industries only (e.g. news services for the industry Telecommunications)?<ul style="list-style-type: none">○ Yes: your package then belongs to the category Specialist• Is the content of your business package relevant to some business areas only (e.g. a reporting tool for the business area Sales)?<ul style="list-style-type: none">○ Yes: your package then belongs to the category Specialist• Is the content of your business package relevant to all users in an enterprise in all industries/business areas (e.g. an HR Self-Service such as Change Address or Travel Request)?<ul style="list-style-type: none">○ Yes: your package then belongs to the category Every User• Is the content of your business package relevant to the line manager role in an enterprise in all industries / business areas?<ul style="list-style-type: none">○ Yes: your package then belongs to the category Line Manager (e.g. an accounting report in the area of Budget Management or People Management)

Recommendation

- SAP recommends defining the package categories early on in the project and agreeing them with SAP. Correct specification of the folder for content objects is a certification criterion, documented in section 3.2.12.

3.2.13 Workset Properties – Sort IDs

Entry points are used to define the entries in the first level of the top-level navigation. If a workset is identified as an entry point, the title of the workset appears in the navigation. For such a workset, the Sort ID property defines the position of the tab relative to the tabs for other worksets. The sort ID operates on a global scale that is valid for all worksets. Using this, it is possible to position them on the navigation bar by assigning a higher or lower entry point priority. The lower the value, the further to the left the tab appears on the navigation bar.

Rules
Only integer values within the number range 20-39 can be used.
If two tabs should always be positioned side by side, you can use sort IDs with one decimal place, for example, 20.1 and 20.2.

Recommendation

- Adjust the order of worksets in the navigation according to usage frequency from left to right (top to bottom in list style). The more frequently a tab is used, the further to the left it should be positioned (that is, the lower the sort ID should be, for example, 20 for a tab that is used daily, 29 for a tab that is used less than once a month).

- Adjust the order of worksets according to the sequence of tasks. Start on the left with the simple workset or page that corresponds to the first task of a sequence and continue with the subsequent tasks to the right.
- If you have more than three simple worksets, group related simple worksets in complex worksets. You can group three to seven simple worksets in one complex workset

3.2.14 Workset and Page Properties – Titles

Since the names of worksets and pages determine navigation entries in the top-level or detailed navigation, they have a direct impact on the user interface (role names do not appear in the navigation). Therefore, the names must reflect the user perspective.

Recommendation

- Do not use acronyms (for example, EBP...) or abbreviations (for example, Dist.)
- Do not add an industry name to the tab name, for example, Automotive Dealing
- Do not use software or product names, for example, E-Selling
- Do not use role names as tab names, for example, Customer, Sales Manager
- Do not use colons, for example, Products: Enter
- Use task-specific labeling whenever possible: Describe the action that the user can perform using the content that can be accessed through the link or tab, for example, Change Asset.
- Choose tab names that can easily be understood even by inexperienced users – try to use the same names that the user would choose.
- Keep tab names short and descriptive, use only one word if possible (a maximum of two words or 30 characters).
- Use upper case, for example, Credit Management.

3.2.15 Workset and Page Properties – MergeIDs

Merge IDs can be used to merge content objects across business packages. For example, if two worksets in different business packages have both the same ID in the MergeID property field and the same workset title, all the content that is assigned to the two worksets (for example, other worksets, pages, iViews) can be merged. This happens when both worksets are assigned to a user's role profile. As soon as the worksets or the roles that contain the workset are assigned to the user, the content of the two worksets is grouped together so that the user sees only one workset instead of two.

Rules
You may use merge IDs only for worksets or pages.
If you use merge IDs, their names must start with the vendor namespace prefix.
You cannot merge vendor content objects and SAP delivered content. Merge IDs for vendor content objects may not use the com.sap.pct namespace prefix.

Recommendation

- Merge IDs are optional, so if you do not intend to merge any of your worksets or pages, leave the MergeID property field blank.

3.2.16 iView Properties

The following criteria affect the iViews developed.

Rules
<p>Single Sign-On: The user must be able to access iViews using third-party applications without having to repeatedly enter authentication information for these applications. For example: Once the user logs on to the SAP Enterprise Portal and enters the authentication information for an iView, if required, the user must be able to access the iView during any subsequent logon to SAP Enterprise Portal without having to enter authentication information again.</p>
<p>Browser Independence: iViews must work with all supported versions of at least one browser type supported by SAP Enterprise Portal. For a list of supported browsers, see the Product Availability Matrix (http://service.sap.com/pam → SAP NetWeaver → Components – All Releases → SAP Enterprise Portal). For example: If the SAP Enterprise Portal supports the browser types Internet Explorer (IE) and Netscape, the iView is tested with all versions of either IE or Netscape that SAP Enterprise Portal supports.</p>
<p>System Name/Data Source: If a system name or data source is required, it must be specified during project registration (see section 3.2.7). All iViews must use the system name or data source name as assigned.</p>
<p>Branding Requirement: The iViews must present data according to the portal style sheet selected. This means, if the SAP Enterprise Portal is personalized to a different theme, the iViews must reflect this change.</p>

3.2.17 Optional Criteria

The following are optional criteria. The developer can choose whether to implement them, but if they are implemented, they are tested during certification.

- **Personalization parameters:**
Provide input validation for user parameters where relevant.
- **National language support:**
iViews can support languages and locations (those supported by SAP Enterprise Portal) other than English.
- **Usage of client framework for each browser version:**
The client framework enables portal components to communicate easily with the client. The client framework defines the basic infrastructure for client-side scripting used by iViews and SAP Enterprise Portal itself.
Several features such as automatic relaxing of the JavaScript Origin Policy, Client Eventing, and Client Data Bag simplify the integration and cooperation of different portal components from different servers.
SAP tests client framework usage cases for multiple iViews provided by the vendor.

www.sap.com/netweaver