

Oracle® Application Server Portal

User's Guide

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Oracle Application Server Portal User's Guide, 10g (9.0.4)

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Glossary

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Send Us Your Comments

Oracle Application Server Portal User's Guide, 10g (9.0.4)

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Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this publication. Your input is an important part of the information used for revision.

- Did you find any errors?
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If you have problems with the software, go to <http://www.oracle.com/forums> and find the appropriate OracleAS Portal forum to which to direct your question. These forums are constantly monitored and you should receive a response shortly. Alternatively, you can contact your local Oracle Support Services.

Preface

This manual describes how to use Oracle Application Server Portal (OracleAS Portal) to build a portal. This includes how to set up and maintain pages groups, create the pages that make up the portal, and create a classification model to make the information in the portal easy for your users to find.

A word about the OracleAS Portal documentation set...

If you've used previous releases of OracleAS Portal, you'll most likely notice that the documentation set is quite different in Release 9.0.4. In the past, most task-related information was available in the online help. Beginning with Release 9.0.4, this information is presented in book form only. Field-level and conceptual help are still available through the online help system and, in future releases, will provide links to step-by-step information in the appropriate manuals.

Intended Audience

This manual is intended primarily for page group administrators and page designers. The manual also includes information that is relevant to end users and content contributors. This information can be used as the starting point for providing documentation for your own end users and contributors. Descriptions of the different user types addressed in the manual are provided below.

Each chapter in the manual is directed towards a particular type of user. To find out which chapters will be of most interest to you, read the following descriptions to determine which type of user you are, then refer to the "[Structure](#)" section to see which chapters we recommend for your user type.

For information about the different privileges in OracleAS Portal and how these affect the tasks you can perform, see [Appendix A, "Page Group Object Privileges"](#).

What Is a Public User?

A public user is any user who can access, but is not logged in to a portal. When users first access a portal, they access it as public users, whether or not they have the ability to log in. A public user can view any page that has been marked as public by the page manager, but cannot edit the content of pages.

What Is an Authorized User?

An authorized user is a user who can log in to a portal. If the user is not logged in, the user is a public user. Authorized users may create pages and styles, as well as edit and delete the objects they have created. Authorized users may also have additional responsibilities (see below) or be granted additional specific privileges on objects created by other users. An authorized user's privileges may vary from object to object.

What Is a Content Contributor? A content contributor is an authorized user who can add content to a page. A contributor is assigned by the page manager. There are two levels of contributor:

- **Manage Content:** Contributors with this privilege on a page can add new items to the page, and edit and delete any item in the page. Contributors with this privilege can also add and remove portlets.
- **Manage Items With Approval:** This privilege is available if approvals and notifications are enabled for the page group. Contributors with this privilege on a page can add items to the page and edit any existing item. However, the additions and changes will not be published in the portal until they are approved. Contributors can track the items waiting for approval by using the My Approval Status portlet.

What Is a Page Designer? A page designer (also known as page manager) is an authorized user with the Manage privilege on a page. A user with this privilege can perform any action on the page and can create sub-pages under the page. The page designer is often responsible for designing the layout (or region configuration) of the page and assigning privileges on the page to other users (for example, to determine who can add content to the page).

The scope of a page designer's control over a page may be limited if the page is based on a template.

What Is a Page Group Administrator? A page group administrator is an authorized user who has full privileges on the structure, style, and content of a page group, and can view, edit, and delete any object in that page group, including pages

and styles marked private. A page group administrator can also assign page group privileges to other users.

When a page group is created, the user who created the page group is automatically assigned as its administrator. This user can edit the page group to assign a different page group administrator if necessary.

Note: A page group administrator cannot create new page groups or users—these are tasks performed by the portal administrator.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

Accessibility of Code Examples in Documentation JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

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Structure

This manual contains three parts, seven chapters, and two appendixes:

Part I, "Interacting with Your Portal"

This part contains the chapters that explain how to view and add content to your portal.

Chapter 1, "Viewing and Customizing Pages"

This chapter shows you how to view pages in your portal and, if you have the appropriate privileges, how to personalize those pages to make them work for you.

This chapter is intended for public users and authorized users with customize privileges on pages.

Chapter 2, "Publishing Content"

This chapter shows you how to publish your files to your portal, making them available to other users.

This chapter is intended for content contributors.

Part II, "Building a Portal"

This part contains the chapters that explain how to build a portal.

Chapter 3, "Planning Your Portal"

This chapter introduces you to the concept of a portal and explains the different types of portals you can build.

This chapter is intended for page group administrators.

Chapter 4, "Working with Page Groups"

This chapter shows you how to create and set up a page group.

This chapter is intended for page group administrators.

Chapter 5, "Working with Content"

This chapter shows you all the different things you can do to the content in your page group to make it easier for your users to find and work with.

This chapter is intended for page group administrators.

Chapter 6, "Creating a Look and Feel"

This chapter shows you how you can control the appearance of your page group.

This chapter is intended for page group administrators.

Chapter 7, "Creating and Designing Pages"

This chapter shows you how to create and design pages for your page group.

This chapter is intended for page designers.

Part III, "Appendixes"

This part contains the appendixes.

Appendix A, "Page Group Object Privileges"

This appendix describes the privileges required to perform various page group related tasks.

Appendix B, "OracleAS Portal Seeded Objects"

This appendix lists the various page group objects that are provided by default when OracleAS Portal is installed.

Glossary

The glossary provides definitions for terms used in this and other OracleAS Portal manuals.

Related Documents

For more information, see the following manuals in the OracleAS Portal documentation set:

- *OracleAS Portal Release Notes*
- *Oracle Application Server Portal Configuration Guide*
- *Oracle Application Server Portal Error Messages Guide*

You may also find the following manuals in the Oracle Application Server documentation set useful:

- *Oracle Application Server 10g Concepts*
- *Oracle HTTP Server Administrator's Guide*
- *Oracle Application Server Web Cache Administrator's Guide*

Conventions

The following conventions are also used in this manual:

Convention	Meaning
<i>italicized text</i>	Italicized type introduces important terms used for the first time.
boldface text	Boldface type is used for emphasis, and to represent the names of items as they appear on your screen.
CAPITALIZED text	Capitalized text indicates procedure names.
< >	Angle brackets enclose user-supplied names.
[]	Brackets enclose optional clauses from which you can choose one or none.
.	Vertical ellipsis points in an example mean that information not directly related to the example has been omitted.

Browser Recommendations

When using OracleAS Portal, we recommend that you use one of the following Web browsers:

- Netscape 4.79
- Microsoft Internet Explorer 5.01 or 5.5 (with Service Pack 1) for Windows NT and Windows 2000
- Microsoft Internet Explorer 6.0 for Windows XP

You may encounter JavaScript errors if you use a browser older than the recommended minimum.

Cache Settings

To ensure that your browser is always displaying valid portal content, please make sure that your browser cache settings are as follows:

In Internet Explorer:

1. From the menu, choose **Tools > Internet Options**.
2. Make sure you are on the **General** tab.
3. In the Temporary Internet File section, click the **Settings** button.
4. In the **Check for newer versions of stored pages** radio group, select **Every visit to the page**.
5. Click **OK**.

6. Click **OK**.

In Netscape:

1. From the menu, choose **Edit > Preferences**.
2. Expand the **Advanced** node.
3. Click **Cache**.
4. In the **Document in cache is compared to document on network** radio group, select **Every time**.
5. Click **OK**.

Image Settings

Please make sure that images are automatically loaded as follows:

In Internet Explorer:

1. From the menu, choose **Tools > Internet Options**.
2. Click the **Advanced** tab.
3. Scroll through the list of options to the **Multimedia** node, and select **Show Pictures**.
4. Click **OK**.

In Netscape:

1. From the menu, choose **Edit > Preferences**.
2. Click **Advanced**.
3. Select the **Automatically load images** check box.
4. Click **OK**.

Sometimes this setting is disabled to increase performance on low bandwidth connections. However, one common problem that occurs when images are not automatically loaded is that once logged out, you cannot login again without closing and reinvoking the browser. Hence, we recommend that this setting is always enabled.

What is OracleAS Portal?

This chapter introduces basic concepts unique to OracleAS Portal and outlines the audiences you will want to consider as you construct your portal.

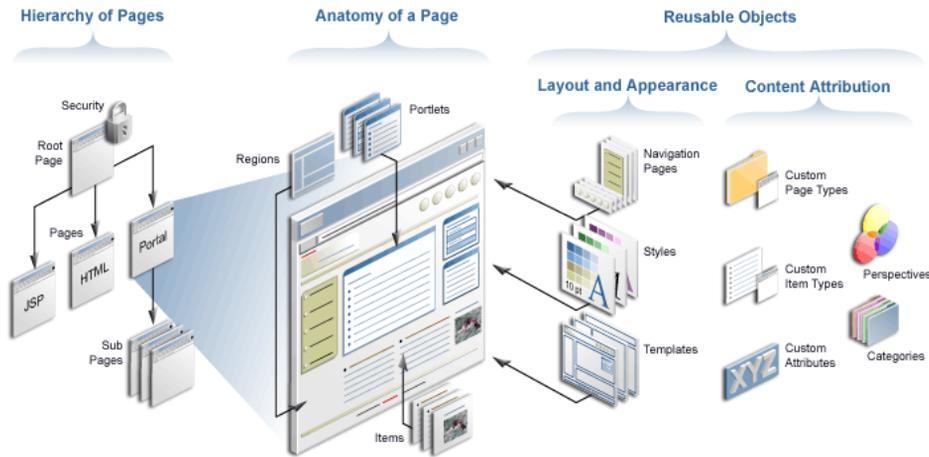
- [What is OracleAS Portal?](#), introduces the OracleAS Portal features you'll need as you ready your portal for use.
- [Who is Your Audience?](#), defines the different user groups typically found at most enterprises. These definitions are becoming increasingly valuable as Oracle continues to evolve and document OracleAS Portal (you'll find that the OracleAS Portal documentation set is based on them), so chances are good that you'll also find them useful as you develop your own portal.

Armed with the knowledge of basic OracleAS Portal terminology as described in this chapter, you'll be much better positioned to take advantage of the wealth of features available to you in this product. And when you're ready, [Chapter 3, "Planning Your Portal"](#) will help you answer some important questions that can help shape and define your portal before you even start clicking.

What is OracleAS Portal?

In order to fully maximize the potential that is OracleAS Portal, you'll need to be familiar with some key concepts and terms. This section introduces these concepts and weaves them together so you'll have a good working knowledge of their importance; however, each concept is treated much more exhaustively elsewhere in this book. Much of what you need to know is depicted in the following diagram:

Anatomy of a Page Group



Let's take this diagram section by section.

Hierarchy of Pages

One of the first things you need to know is that in OracleAS Portal, a portal is a collection of one or more *page groups*. A page group is a hierarchical collection of *pages*. A page is the face of the portal; what the user interacts with to access information and applications. OracleAS Portal pages are flexible enough to contain any HTML content. They can be created and structured declaratively, through browser-based wizards, or defined programatically as Java Server Pages. Information on portal pages is published as either *portlets* or *items*, both of which are described later in this chapter.

A page group is exactly what it sounds like: a group of pages for which common attributes and mechanisms can be established that govern the behavior of the pages it contains. You can construct your entire portal within one page group, or use different page groups as sub-portals targeted at specific communities within your organization. Many vital decisions and configurations are specified at the page group level by the page group administrator (see [Who is Your Audience?](#) for more information on what this role entails).

At the far left of the diagram, notice that the top of the page group is called a *root page*. Every page within a page group is a sub-page of the root page. When you create a page group, a root page is automatically created for you using the same name as the page group itself. Root pages are often used to construct your portal's (or sub-portal's) home page.

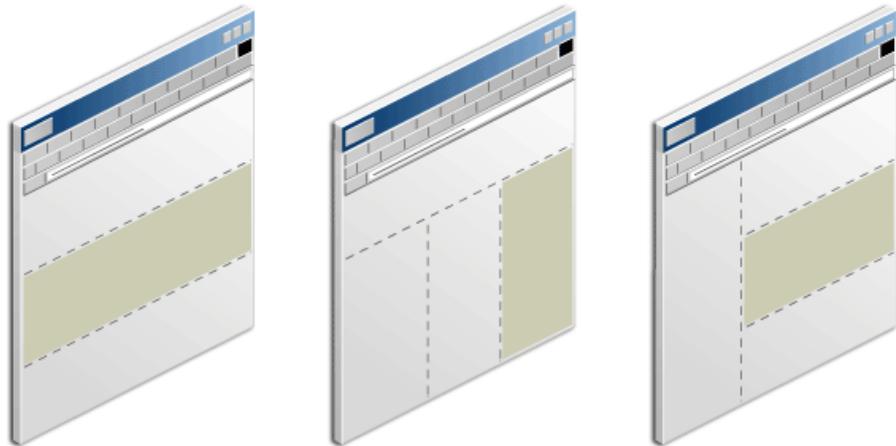
Another important concept to the development of any portal is that of *security*. If you are a page group administrator, you can grant varying levels of access to entire page groups, individual pages, tabs, or even discrete items on a page. You can either make these objects publicly available, or control them through an *access control list*, which states which users and groups can interact with the object and to what extent. You can also grant permission to manipulate the access control list to other users as required.

Anatomy of a Page

In this section of the diagram, three essential concepts are illustrated: regions, portlet, and items.

Every page can be carved up into one or more regions. You accomplish this using tools that are available when editing a page in Layout or Graphical Mode. The following picture shows three pages with varying numbers of regions. It is quite common to use the top region for a banner, one alongside the left for a navigation bar, and perhaps another along the bottom for a footer. In OracleAS Portal, all three of these elements are called navigation pages. (You can use OracleAS Portal to create navigation pages, or have your graphics designer develop JPEGs or GIFs to fulfill this need.) The remaining regions are typically used for page-specific content.

Three Different Region Configurations



Each region has its own set of options that control how the content within it is displayed. For example, you can specify the width of the region relative to the page, whether the region can contain portlets or items (a single region cannot contain

both), and whether to display borders around the portlets in a portlet region. Regions can also include one or more tabs.

Think of a portlet as a reusable building block for easily publishing information and applications. You can instantly deliver new content to thousands of users by simply adding a portlet to the users' view of the portal. All portlets come from a data source registered within OracleAS Portal, called a portlet provider.

The information displayed within portlets comes from a number of sources. Some are as easy to create as checking a box within a wizard; others require knowledge of PL/SQL or Java.

- While creating a page or navigation page, simply check a box in the associated wizard to indicate that you want to publish the page as a portlet. That way, you can re-use the page on other pages, or make the page available for others to use.
- Use OracleAS Portal's wizards to easily create reports, forms, charts, and other types of dynamic components and publish them as portlets. No programming knowledge is required.
- Use your own tools to turn your legacy applications and Web sources into portlets and integrate them through Portal's Application Programming Interfaces (APIs), available in the Portal Developer Kit (PDK).

But you don't have to create your own portlets. Simply by installing OracleAS Portal, you instantly have access to portlets created by a wide range of third-party vendors registered through Oracle's Partner Program. In addition, by subscribing to the OracleAS Portal Developer Services, you can access a number of services and resources available exclusively to the Portal developer community. Not only will you be able to access the development team within Oracle, but you can tap into the greater community of Portal developers who have acquired expertise in working with portlets. And you can publish Portal development knowledge and experience of your own. (If you're responsible for building your own portlets, you'll probably want to consult <http://portalstudio.oracle.com>.)

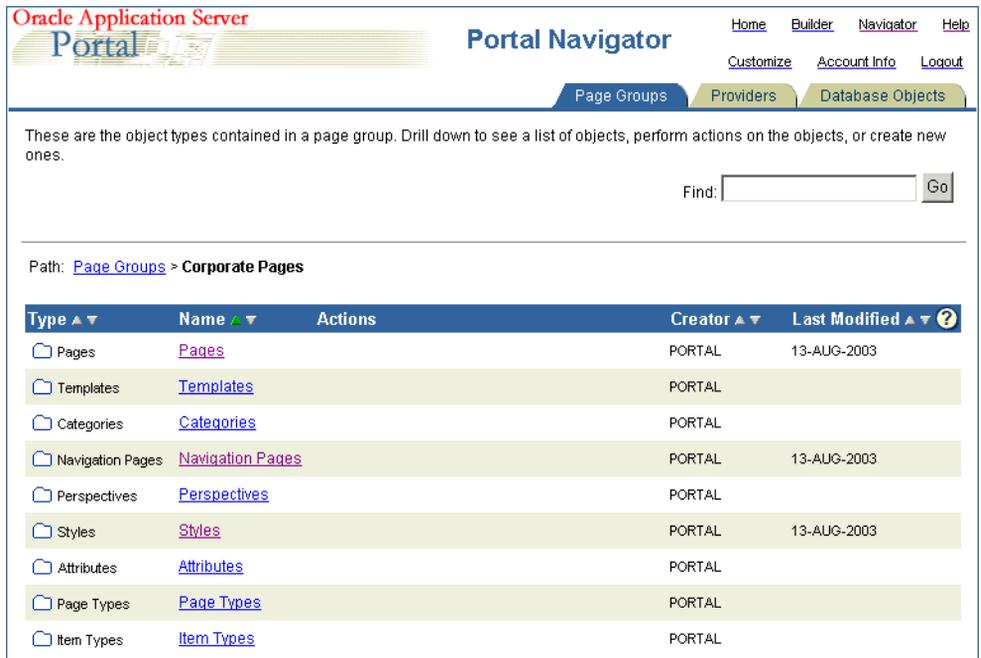
An item is the other basic OracleAS Portal building block. More specifically, an item is an individual piece of content (text, hyperlink, image, and so on) that resides on a page in an item region. There are two types of items: content item types, which display user-managed content such as text, files, images, and URLs; and navigation item types, which are used to provide navigation and to access or execute various portal-specific functions. Items are added to the portal through simple wizards and stored in the Oracle Application Server Metadata Repository for ongoing management and publishing. If you plan to use OracleAS Portal as a content management solution, you'll no doubt rely heavily on the use of items.

Reusable Objects

Reusable objects are created at the page group level and can be used for any page within the page group. For example, you may want to create a consistent color scheme for every page within your portal. (If you want to create objects to use among several different page groups, be sure to create them in the Shared Objects page group.) Even though the graphic doesn't depict it, pages themselves can be considered reusable objects, as any page can be published as a portlet and reused/shared elsewhere in the portal, or in remote portals.

Some objects control how your pages are laid out and how they appear. Others help you organize and classify your information so that others can locate it quickly. The following screen shot depicts the Navigator, which you will use to create and manage all of your reusable objects. The Navigator is an important workspace that you'll use a great deal as you develop your portal.

Page Groups tab in the Navigator



Oracle Application Server Portal Navigator

Home Builder Navigator Help
Customize Account Info Logout

Page Groups Providers Database Objects

These are the object types contained in a page group. Drill down to see a list of objects, perform actions on the objects, or create new ones.

Find: Go

Path: [Page Groups](#) > [Corporate Pages](#)

Type ▲ ▼	Name ▲ ▼	Actions	Creator ▲ ▼	Last Modified ▲ ▼ ?
Pages	Pages		PORTAL	13-AUG-2003
Templates	Templates		PORTAL	
Categories	Categories		PORTAL	
Navigation Pages	Navigation Pages		PORTAL	13-AUG-2003
Perspectives	Perspectives		PORTAL	
Styles	Styles		PORTAL	13-AUG-2003
Attributes	Attributes		PORTAL	
Page Types	Page Types		PORTAL	
Item Types	Item Types		PORTAL	

Each time a page is displayed, it is dynamically assembled and formatted according to the content (portlets and items) and the reusable objects chosen for that page.

Note: Whether or not the page is rebuilt *each* time it is displayed depends on the caching options in place at the time the page request is made.

Layout and Appearance

A template is a type of page from which other pages can inherit layout, style, privileges, and even content, thus enforcing consistency across multiple pages. A page template might include a corporate logo, frequently used links at the top, a navigation bar, and a footer that shows the location of the current page within the page group. When you create a new page, you have the option of selecting a template on which to base it, or to choose no template at all. Styles control the colors, fonts, and backgrounds of pages or regions within pages.

When you use the Create Page wizard, you are asked to supply the navigation page, template, and/or style you want to apply. If you choose not to apply these objects when you create the page, you can always do so later when you edit the page.

Content Attribution

The business of content attribution concerns you much more if you're building a page group that supports collaboration among your users. Collaboration is chiefly supported through OracleAS Portal's content management features, which centers on the use of items. Content attribution refers to the process of associating various attributes with each item and/or page in your portal. These attributes store information about your item or page and/or make it easy to group logically related items and pages together. Attributes also enable advanced metadata searches.

When you add a file to the portal, for example, you use the Add Item Wizard. This wizard prompts you for an item type. The kinds of item types that are exposed through the Add Item Wizard are determined by the page group administrator. Suppose you choose the File item type, which comes with OracleAS Portal by default. The File item type comes with certain default attributes, like File Name, Description, Author, and so on, which you as the publisher of the file are expected to supply in order to complete the publication process. These attributes not only supply information about the file you're adding, but allow you (or others) to later construct custom searches so that you can, say, display all the content published by a given author. (Custom searches are easy to build in OracleAS Portal.)

But suppose the attributes that come with the File item type aren't sufficient for your needs? Suppose you want to add another attribute called Group Name, to identify the group from which the file originated. With OracleAS Portal, you can easily create your own custom attributes using the Create Attribute wizard. At a

minimum, simply identify the Group Name attribute as a Text attribute, add it to the definition of the file item type, and you're done.

You may also want to create *custom item types* specifically for your needs. For example, if you're managing an entertainment portal, you might create a custom item type called Movie Review, which includes custom attributes such as Rating, Reviewer, and Producer. You can even specify which attributes are mandatory and which are optional.

Custom page types operate on the same principle. By default, OracleAS Portal comes with several different page types optimized for use with different types of content. For example, the Standard page type is used to display both portlet and items, and thus is used for the majority of all portal development. Other page types include JSP pages, which display the results of executing a Java Server Page, and URL pages, which allow you to include any Web-accessible page within your portal. However, you may encounter situations where you want to modify the page types already in existence, or require additional page types. For example, you might want to create a Performance Review page for use by your managers, which contains attributes for Rating, Employee Name, Employee Rank, and so on. Like custom items types, it is very easy to create custom page types that are designed to meet your specific requirements.

Categories and perspectives represent a different type of content attribution at the item level. Both are means of classifying your content into discrete groups, to make it easy for users to find. A Human Resources page group might contain categories such as Benefits, Policies, and Payroll. Each time a user adds a piece of content, that content must be assigned to one and only one category (assuming that the Category attribute is exposed for the item type). Users can also search by category and perspective or browse through content that is organized into category and perspective hierarchies.

Perspectives work best when they cut across multiple categories. Because each item can be assigned many perspectives, it's best to reserve them for classifications that take advantage of this strength. In our Human Resources page group, you might choose to make your perspectives reflect the various user groups at the company: Engineers, Design Analysts, Sales Representatives, and so on. It's easy to imagine how the same piece of content, like the company's holiday schedule, would interest all users regardless of their user group. When the user submitted a search based on Engineers, OracleAS Portal would locate all the content tagged with that perspective, irrespective of category. Engineers would see the holiday schedule, as well as all other content from the Benefits, Policies, and Payroll that had been flagged as being of particular interest to that group. Or, on a portal devoted to

travel, the perspectives Inexpensive, Moderate, and Luxury would neatly cut across the categories Lodging, Restaurants, Air Fare, and Rental Cars.

Deciding how to construct all of your attributes is an important part of building your portal taxonomy, and making these decisions should be attended to with care. One of the main benefits of creating a sound attribution model is that it provides you with more flexibility if you choose to publish content dynamically, using the autoquery capability of the custom search portlet. The autoquery feature is extremely powerful, and effective use of it gives you tremendous control over how and where you manage and publish content within your portal. In fact, in many cases it is best to manage content in one area or page group and publish it dynamically throughout the portal. See [Section 3.2, "Making Key Decisions"](#) for more information.

Who is Your Audience?

Keeping your audience firmly in mind as you design and implement your portal is key to creating something that will be truly useful. In working with various companies and moderating our own development process, we've identified six fundamental user groups that you are likely to have in your midst:

- **Viewer** - Consumes information; does not publish it. Requires little, if any, OracleAS Portal-specific knowledge or skills. Must know how to search to find desired information; may need to know how to customize the display to hide or reveal content.

[Chapter 1, "Viewing and Customizing Pages"](#) contains information that will be of use to the viewers of your portal. You may want to give a copy of this chapter to your users; however, it may be more practical for you to use it as an information source as you prepare your own tutorials and how-to guides. That way, you can illustrate OracleAS Portal concepts with concrete examples taken from your own portal, thus solidifying the association in users' minds.

- **Content Contributor** - Publishes items to a portal page. Needs to know how to add and edit items; depending on privileges, may also need to know how to manage them.

[Chapter 2, "Publishing Content"](#) contains information that will be of use to those who will contribute content to your portal. You may want to use the material in this chapter as the basis for creating or augmenting your own user's guide, based on real-life examples from your portal.

- **Page Designer/Builder** - Creates pages, usually for others to populate with content. Extends pages with simple wizard-created components; feeds portlet

requirements to Developers. Provides access to pages to appropriate users and user groups. May set up some reusable components (navigation pages, styles, templates, and so on).

[Chapter 7, "Creating and Designing Pages"](#), in particular, contains information targeted to the page designers/builders at your site.

- Page Group Administrator - Responsible for deciding how to implement the portal: whether to use one page group or many, deciding how deeply to nest pages, and so on; determining the need for and creating custom item and page types; creating categories and perspectives; establishing workflow processes; policing the content contribution effort; feeding requirements to page designers. To maintain consistency, may have complete or partial control over developing reusable objects (navigation pages, styles, templates, and so on.)

Although much of the material in this book is geared toward the page group administrator, [Chapter 3, "Planning Your Portal"](#) is of particular significance. If you're a page group administrator, be sure to read this chapter before you begin creating your portal.

- Portal Administrator - Installs and configures OracleAS Portal and its subsystems. Sets up users and user groups; monitors performance and maintains acceptable levels; manages the Portlet Repository; performs upgrades and adds software patches; registers portlet providers.

Portal administrators should refer to the *Oracle Application Server Portal Configuration Guide*. The tasks in this User's Guide assume that all necessary configuration activities have already been completed.

- Developer - Builds components and/or portlets for others to include on their pages. Relies heavily on the APIs to extend the capabilities of OracleAS Portal; may frequently consult the Knowledge Exchange or the forums for advice or inspiration.

Developers will find <http://portalstudio.oracle.com> to be a valuable source of information.

Part I

Interacting with Your Portal

Part I contains the following chapters:

- [Chapter 1, "Viewing and Customizing Pages"](#)
- [Chapter 2, "Publishing Content"](#)

Viewing and Customizing Pages

This chapter contains information that public users and users with customize privileges need to know. It includes the following main sections:

- [Viewing Pages](#)
- [Finding Information in Your Portal](#)
- [Customizing Pages](#)
- [Subscribing to a Page or Item](#)

1.1 Viewing Pages

This section contains information on how to display pages and describes other actions available while viewing pages. To perform the actions described here you must be logged in to OracleAS Portal:

- [Logging in to OracleAS Portal](#)
- [Displaying a Page](#)
- [Viewing Information About a Page](#)
- [Choosing your Home Page](#)
- [Changing Your Password](#)
- [Choosing a Default Page Style](#)
- [Viewing Translated Files](#)

1.1.1 Logging in to OracleAS Portal

Your page may display a Login link (or icon) or the Login portlet. To login to OracleAS Portal, either:

- Click the Login link (or icon) and then enter your user name and password.
- Use the Login portlet to enter your user name and password.

If you do not know your user name or password, contact your portal administrator.

1.1.2 Displaying a Page

If you are logged in to OracleAS Portal, you can view any page on which you have been granted at least View privileges. If you are not logged into OracleAS Portal, you can only view pages that are available to public users.

When you display a page, you only see the content that you are authorized to see.

Displaying a Page

To display a page:

1. In the Address or Location field of your browser, enter the URL for the page. The URL will look something like the following:

```
http://portalmachine:1000/myportal/url/page/mypage
```
2. If you do not know the URL of the page, you might be able to access the page using navigation tools on your home page.

If you do not see the page that you want to display, you probably don't have appropriate access privileges on the page.

Refreshing a Page

If your page contains a Refresh link, click the link to regenerate the page from the database and view the most up to date version of the page.

Note: Page designers with at least Manage Content/Manage Items With Approval privileges on a page can add Refresh links. See [Section 6.3.4.6, "Adding a Portal Smart Link Item"](#).

Viewing New Items on a Page

If a New icon is displayed besides any item on a page, click New to display a list of all newly created items in the page group.

1.1.3 Viewing Information About a Page

Viewing a property sheet is a convenient and quick way to display page properties or item attributes. You can access the property sheet for information purposes or to troubleshoot a problem.

You must be logged on with the appropriate page or item level privileges to see the property sheet icon.

Note: If your page does not contain these icons, your page designer has not included the Property Sheet attribute in the page region. See [Section 7.5.2.10, "Changing the Attributes Displayed in a Region"](#) and [Section 6.3.4.6, "Adding a Portal Smart Link Item"](#).

Page Property Sheets

Your page designer controls the appearance of the page property sheet link. [Figure 1-1](#) shows an example of a page property sheet:

Figure 1–1 Example of a Page Property Sheet

Required Properties	
Name:	MRKTDATA
URL:	http://webdbvr1.us.oracle.com:5000/pls/ptl_
Page Type:	Container
Display Name:	Marketing Data
Description:	This page summarizes the latest data...
Category:	General
Publish as Portlet:	Yes
Optional Properties	
Item Versioning:	Simple
Contact E-mail:	contact@oracle.com
Page Quota:	<None>
Page Caching Disabled:	
Status:	
Perspectives:	<None>

Item Property Sheets

You can display an item property sheet by clicking the Property Sheet icon next to an item on a page. An item property sheet provides a quick way to view an item's attributes.

Note: Your page may also display other item attribute icons, such as the **New Items** icon and the **Recently Updated Items** icon.

Figure 1–2 shows an example of an item property sheet.

Figure 1–2 Example of an Item Property Sheet

Properties	
Created:	26-FEB-03
Last Modified:	26-FEB-03
Item Link:	http://mycompany.oracle.com:5001/pls/portal/url/IT
File Name:	TCDB.PPT
Display Name:	Company Presentation
Category:	General
Description:	Company overview presentation in PPT format
Publish Date:	26-FEB-03
Expiration Period:	Never Expires
Perspectives::	<None>
Image:	<None>
Image Alignment:	bottom
Basic Search Keywords:	Presentation
Author:	Rosie
Checked out by:	<None>
Display Option:	Link That Displays Item In Full Browser Window

Close

1.1.3.1 Understanding Page and Item URLs

A direct access URL is an easy to read URL that you can use to access or bookmark a specific OracleAS Portal object (e.g., a page, category, perspective, item, or document).

Direct access URLs are typically shorter and more traditional in appearance since the URL contains the object type and name, rather than parameters. For example, if you navigate to a page and look in your browser's Location field it will look something like:

```
http://mymachine.mycompany.com:5000/portal/page?_pageid=93,38903&_dad=portal&_schema=PORTAL
```

This is a rather complicated URL to pass on to other users and this is why the page's direct access URL is often used instead:

```
http://mymachine.mycompany.com:5000/pls/portal/url/page/myportal/mypage
```

Direct Access URLs for Pages

For example, you may be given this URL to access a page called mypage at the top level of the myportal page group:

```
http://mymachine.mycompany.com:5000/pls/portal/url/page/myportal/mypage
```

Or this URL to access a tab called mytab1 on the mytab tab, on the mypage page:

```
http://mymachine.mycompany.com:5000/pls/portal/url/page/myportal/mypage/mytab/mytab1
```

In both cases, url indicates that the URL is a direct access URL to a page (this is the path alias specified in the DAD).

Direct Access URLs for Documents

For example, you may be given this URL to access a document called mydocument.txt that is on the mypage page of the myportal page group:

```
http://mymachine.mycompany.com:5000/pls/portal/docs/page/myportal/mypage/mydocument.txt
```

docs indicates that the URL is a direct access URL to a document (this is the document path specified in the DAD). docs is the default document path, but your portal administrator could have changed it to something else.

It is important to note that direct access URLs for documents are based on the document file name. So, if the file name changes, any links that use the old file name will no longer work. To solve this issue, durable item URLs are sometimes used instead.

Durable URLs for Items

Document names are much more likely to change than page or category names, and this can lead to broken links. To prevent broken links, durable URLs are often used in item links. A durable URL uses the item's globally unique id (GUID) to identify it and an item's GUID does not change.

A durable link is formed as follows:

```
http://<hostname>:<portnumber>/pls/<dad>/url/ITEM/<GUID>
```

For example, if the GUID of the mydocument text item is A47D41ECA23648A9E030007F0100118A, the durable link URL is:

`http://mymachine.mycompany.com:5000/pls/portal/url/ITEM/A47D41ECA23648A9E030007F0100118A`

The durable link for an item is displayed in its property sheet. See [Figure 1-2](#).

1.1.4 Choosing your Home Page

Your home page is the first page displayed when you login to OracleAS Portal, or when you click the Home link or icon. If your page contains an Account Info link you can choose your own home page.

Changing Your Home Page

To change your home page:

1. Click **Account Info**.
2. Next to the **Default Home Page** field, click the **List** icon to see a list of pages from which to choose.

You cannot enter a value in this field, you must select one from the pop-up list.

3. Click **Return Object** next to the page you want to make your home page.
4. Click **OK**.

Note: Click **Reset** to remove this setting.

Tip: To check that you set your home page correctly, log out of OracleAS Portal and log back in again. When you log back in, you should be taken to the page that you specified as your home page.

Changing Your Mobile Home Page

If mobile support is enabled, you can specify the home page displayed when you access OracleAS Portal from a mobile device.

To change your mobile home page:

1. Click **Account Info**.
2. Next to the **Default Mobile Home Page** field, click the **List** icon to see a list of pages from which to choose.

You cannot enter a value in this field, you must select one from the list provided. All the pages displayed in this list are mobile pages.

Note: If you do not see the **Default Mobile Home Page** field, mobile page design is not enabled for the portal.

3. Click **Return Object** next to the page you want to make your home page when you access OracleAS Portal from a mobile device.
4. Click **OK**.

Note: Click **Reset** to remove this setting.

1.1.5 Changing Your Password

For security purposes, your password is set to expire after a certain number of days, as specified by the Single Sign-On Server administrator. As the expiration date of your password approaches, you will be prompted to change it.

If you think someone may know your password, change it immediately.

If you forget your password, ask the Single Sign-On Server administrator to reset it for you.

Note: Changing your password here affects all the Single Sign-On applications you access, not just OracleAS Portal.

If you do not change your password before its expiration date, you will not be able to log on until the Single Sign-On Server administrator resets it for you.

To change your password:

1. Click **Account Info**.
2. In the top right corner of the Edit Account Information page, click **Change Password**.
3. In the **Old Password** field, enter the password that you currently use to log on.
4. In the **New Password** field, enter your new password. Enter the same password in the **Confirm New Password** field to confirm that you entered it correctly.

Note: Choose a password that you can remember, but is not obvious to others.

There may be restrictions on what you can use as a password. For example, passwords may be restricted to a minimum number of characters. If you are having difficulty changing your password, contact your Single Sign-On Server or portal administrator.

5. Click **OK** to return to the Edit Account Information page.
6. Click **OK** to return to your home page.

The next time you log on, use your new password.

1.1.6 Choosing a Default Page Style

If your page contains an Account Info link you can specify a default page style of your choice.

When a page is created, the page designer has the option of imposing a page style or allowing individual users to supply their own. See [Section 7.4.1, "Applying a Style to a Page"](#). When you display a page that allows for individual page styles, the page style you select through Account Info is applied.

To change your default page style:

1. Click **Account Info**.
2. Choose the **Default Style** from the list.
3. Click **OK**.

If you do not specify a default style, the style of your default group is used instead. If you do not have a default group, or the group default style is also not set, the system default style is used.

1.1.7 Viewing Translated Files

To view files in a particular language, you must either have logged on to OracleAS Portal in the appropriate language, or set the language using the Set Language portlet.

All content that is translated into the selected language is displayed on the page. Any content that has not been translated into the chosen language is displayed in

the default language (that is, the language in which the page group was originally created).

1.2 Finding Information in Your Portal

This section contains information on how to find information in OracleAS Portal.

- [Searching Content](#)
- [Interpreting Search Results](#)
- [Saving and Reusing Searches](#)

1.2.1 Searching Content

OracleAS Portal provides a basic search facility for performing simple searches and offers an advanced search option for performing more complex searches. Both can be used to find items, pages, categories or perspectives in OracleAS Portal. For more details, see:

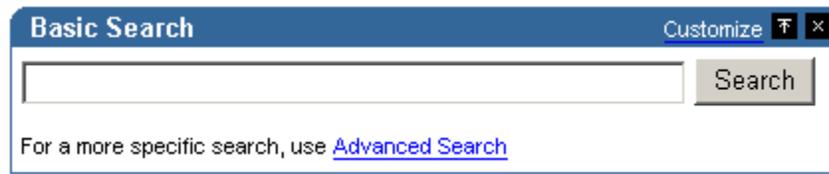
- [Performing a Basic Search](#)
- [Performing an Advanced Search](#)

If Oracle Text is enabled in OracleAS Portal, all text attributes and the actual content of documents and URLs are searched. If Oracle Text is disabled, the following metadata is searched: item attributes (Display Name, Description, Keywords and Author), page attributes (Display Name, Description and Keywords) and category/perspective attributes (Display Name and Description).

For more information on how to enable/disable Oracle Text, see the *Oracle Application Server Portal Configuration Guide (Configuring the Search Feature)* on the Portal Center section of the Oracle Technology Network (<http://portalcenter.oracle.com>).

1.2.1.1 Performing a Basic Search

If your page contains a Basic Search portlet you can search one or more selected page groups for items, pages, categories, and perspectives that contain specific words. [Figure 1–3](#) shows an example of the Basic Search portlet:

Figure 1–3 Basic Search Portlet

Alternatively, your page may contain a Basic Search box. This can also be used to search in one or all page groups for content that contains specific words. [Figure 1–4](#) shows an example of the Basic Search box:

Figure 1–4 Basic Search Box

To perform a basic search:

1. Enter the words that you want to search for

Basic search finds content that contains the specified words. For example, if you enter: weights aerobics

A basic search finds content that contains the word weights and the word aerobics.
2. Choose which page groups are searched:
 - Basic Search portlet - In the **Search In Page Groups** field, select one or more page groups in which to search. If this field does not display, all page groups are searched.
 - Basic Search Box item - The page groups to be searched are pre-selected. You can only change this if you have the privileges to edit the Basic Search Box item.
3. Click **Search**.

Here are some notes and tips to consider when searching:

- Searches are not case-sensitive.

- To search for multiple words, separate each word with a space, for example: `weights aerobics`. Content containing the word `weights` and the word `aerobics` is returned.
- To search for a phrase, enclose the phrase in single quotes, for example: `'weight lifting'`
- The `%` character is interpreted literally, so do not include it as a wildcard.
- **If Oracle Text is disabled** and you enter `100%` as your search term, content containing the text `100%` is returned, not `1000` or `10000`. Wildcards are automatically added to the beginning and end of your search term, so searching for `100` automatically returns content that contains `1000` and `10000`.
- **If Oracle Text is installed and enabled**, the stem operator is used to search for words that have the same linguistic root as the specified word. For example, if you specified the word `lift`, content containing the words `lift`, `lifting`, or `lifted` is returned.
- If you want more advanced search features, click the **Advanced Search** link (if there is one).

1.2.1.2 Performing an Advanced Search

Use the Advanced Search portlet to:

- Find content that contains all (or any) of the specified words.
- Search across one or more selected page groups.
- Restrict the search to a particular page, category, perspective, item type, or attribute.
- If you have Oracle Text installed and enabled, you can also use advanced search to perform near, like, soundex, and fuzzy searches. You can also search across one or more selected perspectives.

[Figure 1–5](#) shows an example of the Advanced Search portlet:

Figure 1–5 Advanced Search Portlet (Oracle Text enabled)

Advanced Search Customize

Search

Find results that contain all of the terms

Search In

Page Groups

Page Include Sub-pages

Filter By

Match All Of The Following Match Any Of The Following

Perspective Match All Include Sub-perspectives

Category Equals All

For advice on how to search, read the [Search Tips](#)

You may access the advanced search in several ways, such as:

- Clicking the **Advanced Search** link on a page or Basic Search portlet.
- Displaying a page containing an Advanced Search portlet.

To perform an advanced search:

1. Enter the words that you want to search for.
2. Choose a search operator, i.e., **Find results that:**
 - **contain all of the terms** returns content containing all of the specified words. For example, if you enter the search term `weights aerobics`, content containing the words `weights` **and** `aerobics` is returned.
 - **contain any of the terms** returns content containing any of the specified words. For example, if you enter the search term `weights aerobics`, content containing the words `weights` **or** `aerobics` is returned.

The behavior of the operators **contain all of the terms** and **contain any of the terms** depends on Oracle Text. If Oracle Text is **disabled** and you enter `100%` as your search term, content containing the text `100%` is returned, not `1000` or `10000`. Wildcards are automatically added to the beginning and end

of your search term, so searching for 100 automatically returns content that contains 1000 and 10000.

If Oracle Text is **installed** and **enabled**, the stem operator is used to search for words that have the same linguistic root as the specified word. For example, if you specified the word `lift`, content containing the words `lift`, `lifting`, or `lifted` is returned

- **contain these terms exactly** returns content containing any of the specified words. This operator is available only if Oracle Text is disabled.
- **partially match all of the terms (%term%)** performs a partial match search of **all** of the words specified. e.g., if you enter `100` it returns results such as `10000` and `1100BC`. This operator is available only if Oracle Text is installed and enabled.
- **partially match any of the terms (%term%)** performs a partial match search of **any** of the words specified, e.g., if you enter `age 100` it returns results such as `10000`, `1100BC`, and `stage`. This operator is available only if Oracle Text is installed and enabled.
- **contains these terms located close to each other** searches for **two** terms and returns a score based on the proximity of the specified words in the content. A higher score is returned for content with the specified words closer together and a lower score is returned for words farther apart. This operator is available only if Oracle Text is installed and enabled.
- **sounds like all of the terms** searches for content containing words that sound similar to all the specified terms. This allows comparison of words that are spelled differently, but sound alike in English. This operator is available only if Oracle Text is installed and enabled.
- **sounds like any of the terms** searches for content containing words that sound similar to any of the specified words. This allows comparison of words that are spelled differently, but sound alike in English. This operator is available only if Oracle Text is installed and enabled.
- **are spelled like all of the terms** searches for content containing words that are spelled similarly to all the specified words. This is helpful for finding more accurate results when there are frequent misspellings in the content. This operator is available only if Oracle Text is installed and enabled.
- **are spelled like any of the terms** searches for content containing words that are spelled similarly to any of the specified words. This is helpful for finding more accurate results when there are frequent misspellings in the

content. This operator is available only if Oracle Text is installed and enabled.

3. In the **Search In** field, select one or more **Page Groups** in which to search.

If this field does not display and providing that you do not restrict your search to one or more pages (see below), all page groups are searched.

4. Select the **Page** in which you want to search.

Select **Include Sub-pages** if you also want to search in pages beneath the page you specified.

Note that searches can be restricted to one or more page groups **or** pages. When a page is selected, the Page Groups option is ignored.

5. In **Filter By**, click:

- **Match All Of The Following** to search for content that matches **all** the attribute search criteria, for example content that contains that word `aerobics` in its title and was added after `10-OCT-03`.
- **Match Any Of The Following** to search for content that matches **any** of the attribute search criteria, for example content that contains the word `aerobics` in its title or was added after `10-OCT-03`.

6. From the **Perspective** and **Category** lists, choose the perspectives and categories in which you want to search.

- These lists show only the categories and perspectives relevant to the page group chosen in the **Page Group** list. If a single page group is selected, categories and perspectives of that page group and the Shared Objects page group are displayed. If multiple page groups are selected, only categories and perspectives in the Shared Objects page group are displayed.
- These lists may not be labeled **Perspective** and **Category** if the page group administrator has changed the labels.
- If Oracle Text is enabled you can choose more than one perspective. You can perform a search that **Matches All** or **Matches Any** of the perspectives you select and if you choose **Include Sub-perspectives** you can extend your search to perspectives beneath the perspectives you have chosen.

7. You can also restrict your search to specific attributes of pages and items. For example, if you know that the item you want to find contains the word `aerobics` in its title, or that it was added some time after `10-OCT-03`, you can search for those particular attributes.

- a. Click **More Attributes** to specify additional attribute search criteria.
 - b. In the first field, click the List icon to select the attribute name, for example `Title` or `Creation Date`.
 - c. In the second field, choose the search operator, for example **Contains All, Equals or Greater than**.
 - d. In the third field, enter the words that you want to search for, for example `aerobics` or `10-OCT-03`. You can also enter expressions in this field, including `#USER#` (for the current user) and `#TODAY#` (for today's date).
 - e. Click **More Attributes** if you want to specify search criteria for another attribute.
8. Click Search.

1.2.2 Interpreting Search Results

The Search Results Page can display items, pages, categories, or perspectives that meet your search criteria. It will not display:

- Items you are not authorized to view
- Items that have expired
- Items that are not yet published.

[Figure 1–6](#) shows how search results are displayed.

Figure 1–6 Example of Search Results Page

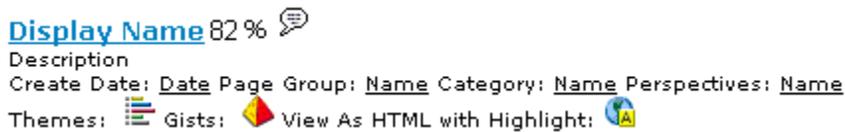
- **Items:** Click the Items tab to display a list of the items that meet your search criteria. Click the item display name to display the item itself. Portal Smart Links are excluded from the search results.
- **Pages:** Click the Pages tab to display a list of the pages that meet your search criteria. Click a page name to display that page.
- **Categories:** Click the Categories tab to display a list of the categories that meet your search criteria. Click a category display name to list the items associated with that category.
- **Perspectives:** Click the Perspectives tab to display a list of the perspectives that meet your search criteria. Click a perspective display name to list the items associated with that perspective.

If you are searching in a single page group, a Bulk Action link can be displayed to allow you to perform actions on multiple search results simultaneously. For more information on displaying the Bulk Action link, for Custom Search portlets only, see [Section 7.7.3.3, "The Custom Search Form"](#). This link is not displayed for searches on the Shared Objects page group.

Search Result Content

The default content and layout of an item returned within search results is shown in [Figure 1–7](#).

Figure 1–7 Search Result Information



To display the item, click the display name. To display information about the item, click the property sheet icon.



If Oracle Text is installed and enabled, you may see the following displayed with your search results.

- Your page designer determines which icons are displayed, see [Section 7.5.2.10, "Changing the Attributes Displayed in a Region"](#).
- Your portal administrator determines whether gists and themes are generated for each item returned by the search, see the *Oracle Application Server Portal Configuration Guide* (Configuring the Search Feature) on the Portal Center section of the Oracle Technology Network (<http://portalcenter.oracle.com>).

nn%

Displays the Oracle Text relevancy score, rating how each result matches the search words.



Click to display an HTML version of any file item.



Click to display an HTML version of any file item with the search words highlighted.



Click to display an item summary generated by Oracle Text, also called the item's gists.



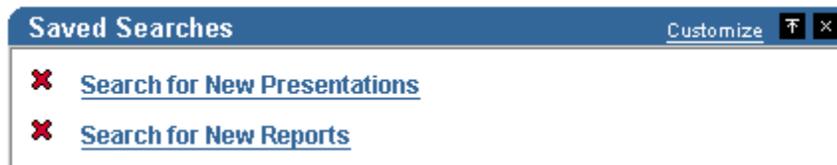
Click to display the nouns and verbs appearing most often within the item, also called the item's themes.

1.2.3 Saving and Reusing Searches

When you save a search, you save all the search criteria under a single name. This allows you to repeat the search at a later time, by choosing the saved search name rather than re-entering the criteria manually.

Saved searches are displayed in the Saved Searches portlet as shown in [Figure 1–8](#) below.

Figure 1–8 *Saved Searches Portlet*



If you can not see the Saved Searches portlet and you have the appropriate privileges, add the portlet to a page. See [Section 1.3.1, "Adding a Portlet to a Page"](#). If you do not have the privileges to add the portlet to a page, ask your page designer to add it for you.

You **must** be logged in to OracleAS Portal to save a search and see the Saved Searches portlet.

Saving a Search

To save search results:

1. Perform your search.
2. On the search results page, click the **Save Search** link.

"Save search" is the default text for this link. If the search results page has been customized, the link text may be different, or may not be displayed at all.

If you are not logged in you **will not** see the Save Search link.

3. In the **Display Name** field, enter a name under which to save the search criteria.
4. Click **OK**.

The name assigned to this search is displayed in the Saved Searches portlet. To re-submit the search, click the search name.

Adding a List of Saved Searches to a Page

If you save one or more searches, you can access them from your home page, or from any page, as long as you have the authority to add the Saved Searches portlet to that page.

To add a list of saved searches to a page:

1. At the top of the page, click **Customize**.
2. In the region where you want to add your saved searches, click the Add Portlet icon.
3. Click **Portal Content Tools** in the Portlet Repository.
4. Click **Saved Searches**.
Saved Searches is now included in the **Selected Portlets** list.
5. Click **OK**.
6. Click **Close** to return to the page.
7. In the Saved Searches portlet header, click **Customize**.
8. Change the name of the portlet, if desired, in the **Display Name** field and set other options if required.
9. Click **OK**.

Reusing a Saved Search

When you save a search, you save all the search criteria under a single name. This allows you to repeat the search quickly, by choosing the saved search name rather than re-entering the criteria manually.

You must be logged in to OracleAS Portal to re-use a saved search.

To reuse a saved search:

1. In the Saved Searches portlet, a list of saved searches are displayed.
2. Click the name of the search you want to perform.

If you can not see the Saved Searches portlet, add it to a page. If you do not have the privileges to add the Saved Searches portlet to a page, ask your page designer to add it for you.

1.3 Customizing Pages

You can customize a page, i.e. make changes to a page that are visible only to you. This section describes the customize options that are available and [Table 1-1](#) outlines the privileges required to perform these page customizations:

- [Adding a Portlet to a Page](#)
- [Rearranging Portlets in a Page Region](#)
- [Moving Portlets to Different Regions/Tabs](#)
- [Hiding a Portlet on a Page](#)
- [Deleting a Portlet From a Page](#)
- [Rearranging the Order of Tabs in a Region](#)
- [Hiding a Tab on a Page](#)
- [Applying a New Style to a Page](#)
- [Customizing a Page Parameter](#)
- [Removing Your Page Customizations](#)

Note that you cannot customize the items on a page.

Table 1-1 *Customize Page Privileges*

Privilege	Description
Customize Portlets (Full)	<p>If you have the Full Customize Portlets privilege you can change the style of the page, add portlets to the page, and delete, move, hide, or show any portlet on the page.</p> <p>Notes:</p> <ul style="list-style-type: none"> ■ These changes are visible only to you. For example, if you delete a portlet from a page, other users will still be able to see that portlet on the page. Likewise, if you add a portlet to a page, other users will not see it. ■ To change the style of a page, the page group option Allow Privileged Users To Customize Page Style must be set.

Table 1–1 Customize Page Privileges

Privilege	Description
Customize Portlets (Add-Only)	<p>If you have the Add-Only Customize Portlets privilege you can change the style of the page, add portlets to the page, and remove, hide, or show the portlets that are added.</p> <p>Notes:</p> <ul style="list-style-type: none">■ These changes are visible only to you. For example, if you add a portlet to a page, only users will not see it.■ To change the style of a page, the page group option Allow Privileged Users To Customize Page Style must be set.
Customize Portlets (Hide-Show)	<p>If you have the Hide-Show Customize Portlets privilege you can change the style of the page, and hide, show, or rearrange any portlet on the page.</p> <p>Notes:</p> <ul style="list-style-type: none">■ These changes are visible only to you. For example, if you hide a portlet on a page, other users will still be able to see it.■ To change the style of a page, the page group option Allow Privileged Users To Customize Page Style must be set.

Table 1–1 Customize Page Privileges

Privilege	Description
Customization (Style)	<p>A user with the Style Customization privilege can apply a different style to the page.</p> <p>Notes:</p> <ul style="list-style-type: none"> ■ These changes are visible only to the user who made them. For example, if a user with the Style Customization privilege applies a different style to a page, other users will still see the page with the fonts and colors of the original style. ■ For a user with this privilege to change the style of a page, the Allow Privileged Users To Customize Page Style option must be selected at the page group level. When this option is selected, users with this privilege on a page can apply a different style when customizing the page. ■ If a page is based on a template, users with this privilege may not be able to control the style of the page. The template level option, Enable Pages To Use Different Style, controls whether page designers can specify different style settings for the page. This option must be selected, otherwise, the page's style settings cannot be changed by users with this privilege. ■ This privilege is not available for mobile pages.
View	<p>A user with the View privilege can view the content of the page, but cannot add, remove, show, or hide any of that content.</p>

1.3.1 Adding a Portlet to a Page

You can add portlets to your version of the page. Each region on a page may contain one or more portlets.

To add a portlet to a page:

1. Navigate to the page on which you want to add a portlet
2. Click **Customize**.
3. Click the **Add Portlets** icon in the region in which you want to add a portlet.

Note: If the region already includes items, the **Add Portlets** icon is not available as you cannot add portlets to the region.

4. In the Portlet Repository, locate the portlet that you want to add. If you know the name of the portlet, enter it in the **Search** field and click **Go**.

OracleAS Portal provides a number of built-in portlets for you to use. See [Section B.5, "Built-in Portlets"](#). If you have the appropriate privileges to access a portlet, it is displayed.

5. (Optional) To check what a portlet looks like before adding it to your page, click the **Preview** icon next to the name of the portlet. The Preview feature is not available for all portlets.
6. To add a portlet to your page, click the portlet name. Multiple selects are not supported.

The order of the portlets in **Selected Portlets** reflects the order in which they appear on the page. To change the order of the portlets, highlight the portlet name and use the arrows to specify the new order.

7. Click **OK**.

1.3.2 Rearranging Portlets in a Page Region

You can change the order in which portlets are displayed in a page region.

To rearrange portlets:

1. Navigate to the page that includes the portlet.
2. Click **Customize** to switch to customize mode.
3. In the region that contains the portlets that you want to rearrange, click the **Arrange Portlets** icon.
4. In the **Arrange Portlets** list, select a portlet and use the arrows to reorder it in relation to the other portlets in the list. Repeat this step for other portlets that you want to rearrange.
5. Click **OK**.
6. Click **Close** to display your customized page.

1.3.3 Moving Portlets to Different Regions/Tabs

You can move portlets to another region or tab on the same page.

To move a portlet:

1. Navigate to the page that includes the portlet.

2. Click **Customize** to switch to customize mode.
3. Select the checkbox for the portlet you wish to move.

Note: You can move several portlets to another region in a single operation by selecting the check boxes next to the portlets that you want to move.

4. Click **Move**.
5. Select a region for the portlet to move to. You can choose a region on a different tab.
6. Click **Move Portlet**.

1.3.4 Hiding a Portlet on a Page

If your page contains a portlet that you are not currently interested in viewing, you can hide it. If you need the portlet at a later date, you can restore it. This feature is useful if you do not have the appropriate privileges to delete portlets.

To hide a portlet:

1. Navigate to the page that includes the portlet.
2. Click **Customize** to switch to customize mode.
3. Select the checkbox for all the portlets you wish to hide.
4. Click **Hide**.

Note that the selected portlets are now greyed. To show a hidden portlet in the future, select the portlet and click **Show**.

5. Click **Close** to display your customized page.

1.3.5 Deleting a Portlet From a Page

You can delete a portlet from your view of a page. The actual portlet is not deleted from the Portlet Repository, so you can add the portlet back later if you wish.

If you think that you may need the portlet in the future, consider hiding the portlet instead.

To delete a portlet:

1. Navigate to the page that includes the portlet.
2. Click **Customize** to switch to customize mode.
3. Select the checkbox for the portlet you wish to delete.
4. Click **Delete**.
5. Click **Yes** to confirm and then **Close** to display your customized page.

1.3.6 Rearranging the Order of Tabs in a Region

To change the order of tabs in a region:

1. Navigate to the page that includes the tabs.
2. Click **Customize** to switch to customize mode.
3. Click the **Arrange Tabs** icon in the relevant region.
4. In the **Arrange Tabs** list, select a tab and use the arrows to change the tab order.
5. Repeat step 4 to rearrange another tab.
6. Click **OK**.
7. Click **Close** to display your customized page.

1.3.7 Hiding a Tab on a Page

To hide a tab on a page:

1. Navigate to the page that includes the tabs.
2. Click **Customize** to switch to customize mode.
3. Select the checkbox for all the tabs you wish to hide.
4. Click **Hide**.

Note that the selected tabs are now greyed. To show a hidden tab in the future, select the tab and click **Show**.

5. Click **Close** to display your customized page.

1.3.8 Applying a New Style to a Page

The style you apply to a page governs the colors and fonts used by the page and all the tabs, portlets, and items displayed within it. If you want to use different colors and fonts, you can apply a different style to the page.

You can not apply a different style to the page:

- If the page is based on a page template and that template does not allow pages to use a different style.
- If your page group administrator has disabled the setting **Allow Privileged Users to Customize Page Style**.

To apply a new style to a page:

1. Navigate to the page that requires style changes.
2. Click **Customize** to switch to customize mode.
3. Click the **Style** tab.
4. The **Current Style** field shows which style is currently applied to the page. The Preview section includes a preview of the current style's settings. To apply a different style to the page, choose the style you want to use in the **Choose Style** list. When you choose a new style, the preview is refreshed to show this style's settings.

The **Choose Style** list includes all the public styles in this page group and the Shared Objects page group, as well as any styles that you have created in this page group for your own use. The **<Use Users Default Style>** option sets the page style to whatever style you specified as your default. See [Section 1.1.6, "Choosing a Default Page Style"](#).

5. In the Preview section, click each of the radio buttons to check that colors and fonts used in the style meet your requirements.
6. Click **OK**.

1.3.9 Customizing a Page Parameter

Page parameters are used to pass values to a page. If customizable parameters are defined for a page you can change the information displayed on the page to suit your needs. For example, a page has a Ticker parameter and it displays several stock-related portlets which have parameters for Ticker. You can customize this page to display different stock information, by changing the stock Ticker parameter.

To customize a page parameter:

1. Display the appropriate page.
2. Click **Customize** to switch to customize mode.

3. Click the **Parameters** tab (available only if the page has customizable parameters).

For more information, see [Section 7.11.3, "Adding a Parameter to a Page"](#).

4. In the **Value** field, enter the value you want to use for a parameter.

Changing the value of a parameter may change the information displayed in portlets on the page.

5. Click **OK** to return to the page.

1.3.10 Removing Your Page Customizations

To remove page customizations:

1. Display the appropriate page.
2. Click **Customize** to switch to customize mode.
3. Do one of the following:
 - Click **Remove My Page Customizations** to restore the page to its original settings. For example, this removes any portlets or tabs added to the page. It also restores any portlet or tab that was deleted. All customizations are removed, no matter how long ago they were made.
 - Click **Remove My Tab Customizations** to remove any changes made to the currently active tab. For example, this removes any portlets or sub-tabs that were added to the tab through user customization. (Base portlets, those that were included on the tab prior to customization, are restored, if they were moved from the tab.) All customizations are removed, no matter how long ago they were made.

Note: If you cannot perform actions on certain areas (or regions) of the page, the **Enable Users To Include Content In This Region** option for the region may not be selected. Contact your page designer for more information. See also [Chapter 7.5.2, "Configuring Region Display Options"](#).

1.4 Subscribing to a Page or Item

If your page contains a Subscribe link and you subscribe to the page, you are notified whenever that page is updated. Similarly, if Subscribe icons are displayed next to items on a page you can be notified whenever the items are updated.

To subscribe to pages or items you must be logged on to OracleAS Portal. To view information about subscribed pages or items you must have access to a page containing the My Notifications portlet.

This section provides the following information:

- [Subscribing to a Page](#)
- [Subscribing to an Item](#)
- [Customizing the My Notifications Portlet to Show Your Subscriptions](#)

For more information on approvals and notifications, see [Section 7.9, "Setting Up an Approval Chain"](#).

1.4.1 Subscribing to a Page

To subscribe to a page:

1. Navigate to the page to which you want to subscribe.
2. Click the **Subscribe** link.

Now you will be notified whenever the page is updated. You can check for notifications using the My Notifications portlet. Subscribing to a page automatically subscribes you to every item on that page.

The default label for the **Subscribe** link is **Subscribe**, however, the page designer may have given it a different label, or decided to use an icon instead. If you are not sure what to click to subscribe to the page, contact the page designer.

1.4.2 Subscribing to an Item

To subscribe to an item:

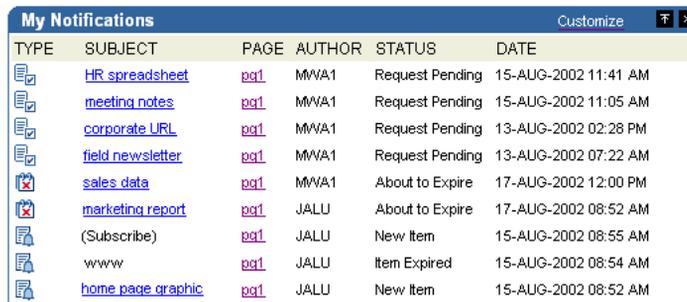
1. Navigate to the page containing the items to which you want to subscribe.
2. Click the **Subscribe** icon next to the item.

Now you will be notified whenever the item is updated.

Subscribe icons are displayed if they have been added to the page region. If no Subscribe icons are available, contact the page designer.

1.4.3 Customizing the My Notifications Portlet to Show Your Subscriptions

If you have the appropriate privileges, you can customize the My Notifications portlet to display information about items and pages to which you subscribe.

Figure 1–9 My Notification Portlet Example


My Notifications						Customize
TYPE	SUBJECT	PAGE	AUTHOR	STATUS	DATE	
	HR spreadsheet	pg1	MWA1	Request Pending	15-AUG-2002 11:41 AM	
	meeting notes	pg1	MWA1	Request Pending	15-AUG-2002 11:05 AM	
	corporate URL	pg1	MWA1	Request Pending	13-AUG-2002 02:28 PM	
	field newsletter	pg1	MWA1	Request Pending	13-AUG-2002 07:22 AM	
	sales data	pg1	MWA1	About to Expire	17-AUG-2002 12:00 PM	
	marketing report	pg1	JALU	About to Expire	17-AUG-2002 08:52 AM	
	(Subscribe)	pg1	JALU	New Item	15-AUG-2002 08:55 AM	
	www	pg1	JALU	Item Expired	15-AUG-2002 08:54 AM	
	home page graphic	pg1	JALU	New Item	15-AUG-2002 08:52 AM	

If the notification item subject includes parentheses, such as "(Account Info)", the item is a Portal Smart Link.

To customize the My Notifications Portlet:

1. In the My Notifications portlet header, click **Customize**.
2. In the **Display Name** field, enter the name that you want to appear in the portlet header. The default is My Notifications.
3. Choose whether to **Show All Notification Items** in the portlet, or to **Limit the List** to a specified number of notifications. The default is 10.

There is no maximum limit but you may start to experience performance issues if the number of notifications displayed in your portlet is too large.

4. Choose **Show Subscription Notifications**.

The My Notifications portlet shown in [Figure 1–9](#) is set up to show all three types of notifications, i.e. Subscription, Expiry and Approval.

5. Select whether to **Display Notification Type Icons** for notifications listed in the portlet.

When the My Notifications portlet is set up to show more than one type of notification (i.e. Subscription, Expiry, Approval) the Type icons can help you distinguish between these different types.

6. Select whether to **Display Notification Status** for notifications listed in the portlet. The subscription status values include:

Table 1–2 Subscription Notification Status Values

Status	Description
Item Deleted	An item to which you subscribe was deleted.
Item Expired	An item to which you subscribe has expired.
Item Updated	An item was updated to which you subscribe. Note that updates include actual changes to items (for example, additional text added to a file), and also changes in item versioning. If you set an item to be the current version, this is considered an item update for subscriptions.
New Item	A new item was added to a page to which you subscribe.
New Page	A new sub-page was added to a page to which you subscribe. Note that notifications are not sent for updates to a sub-page.
New Portlet	A new portlet was added to a page to which you subscribe.
New Tab	A new tab was added to a page to which you subscribe.
New Version	An item to which you subscribe has a new version.

A subscription notification always links to the current version of the item.

- If you update an existing item, or set an existing version to be the current version, the notification status is "Item Updated".
- If you add an item as a new version and as the current version, the notification status is "New Version".
- If you add an item as a new version, but not the current version, and you update it, this will not initiate a subscription notification.

7. Click **Apply**.
8. Choose whether to display subscription notification items from all page groups in the portlet, or to limit the list to a specified page group(s). Click the **Browse Page Groups** icon to select a page group.
9. Specify a time limit for the subscriptions displayed in the portlet. The default setting is 24 hours.
Subscriptions older than the specified time limit are not displayed.
10. Specify a cache time period. The default is 60 minutes.

This setting determines how frequently subscriptions in the cache are updated. If portal content changes frequently and real time updates are critical, choose a low value, e.g. 10 minutes. If portal content is fairly static a longer cache time may be sufficient, e.g. if you specify 360 minutes, the cache is updated once every 360 minutes.

In addition, the cache is refreshed automatically for certain events, such as when you subscribe to an object.

11. Click **OK**.

Publishing Content

This chapter contains information that a content contributor, who is mainly adding files to a page, needs to know. It includes the following main sections:

- [Working with Items](#)
- [Using Version Control](#)
- [Protecting Your Content](#)
- [Working With Approvals](#)
- [Publishing Files Using a WebDAV Client](#)
- [Publishing Translated Files](#)

Intended Audience

The contents of this chapter are intended for users who are logged on as an authorized user with the appropriate page or item privileges to add items, i.e. the Manage Content privilege. If a particular task requires different privileges, the required privileges will be listed before the steps of that task.

2.1 Working with Items

You add content to a page by adding items. To add files (such as documents) you add items with a file-based item type.

There are other types of items that can be added to a page. Your page group administrator determines which item types are available to you, when they set up the page group.

OracleAS Portal provides many item-related features which support document collaboration among different users and groups. The main item features include the following:

- **Versioning** - When item versioning is enabled, previous versions of an item are retained instead of being overwritten when the item is edited. This means that you can have a record of all the changes made to an item and can revert to a previous version if necessary. See [Section 2.2, "Using Version Control"](#).
- **Item level security** - OracleAS Portal includes item level security which lets you choose which specific users or groups are able to access the item. See [Section 2.3, "Protecting Your Content"](#).
- **Document control** - With document control, groups of users can edit items using a check in and check out process. This feature restricts a user from editing the item while it is being edited or checked out by another user. See [Section 2.1.10.4, "Using Item Check Out/Check In"](#).
- **Publishing dates** - When an item includes the Publish Date attribute, you can add an item to a page anytime yet have it displayed in View mode to other users, only on a specified date in the future. See [Section 2.1.10.2, "Setting a Publish Date for an Item"](#).
- **Expiry dates** - When an item includes the Expiration Period attribute, you can specify how long an item should be displayed on a page. See [Section 2.1.10.3, "Setting Expiration Details for an Item"](#).
- **Approvals** - The "Manage Items With Approval" page privilege allows you to add items that must first be approved before they are displayed to other users in View mode. See [Section 2.4, "Working With Approvals"](#).

2.1.1 Displaying a Page in Edit Mode

If you are logged in to OracleAS Portal and you have at least Manage Content privileges on the page, you can display a page in Edit mode. In Edit mode you can make changes to the page content that is visible to all users.

If you want your changes to be visible to yourself only, customize the page instead. See [Section 1.3, "Customizing Pages"](#).

To display a page in Edit mode:

1. Navigate to the page.

Note: If you do not see the page that you want to work with, you may not have the appropriate page access privileges. See your page group administrator to gain access.

2. Click **Edit** to switch to edit mode.

Edit is the default name for this link. Your page designer may have given this a different name.

2.1.2 Displaying a Page Portlet in Edit Mode

You may find that page content is exposed to you through page portlets. In this case, it may still be possible to edit the content by switching to Edit mode within the portlet itself. If you have this capability, you will see an Edit link in the portlet header as show in [Figure 2–1](#).

Figure 2–1 The Edit Link in a Page Portlet

The screenshot shows a user interface titled "My Page". At the top right, there is a red circular button labeled "Edit". Below the title bar, there are several portlets:

- Favorites:** Includes a "Customize" link and a list of items: "Oracle" and "Oracle Technology Network".
- External Applications:** Includes a "Customize" link and a message: "No external applications have been selected for display. To select applications to display, click 'Customize'".
- My Notifications:** Includes a "Customize" link and a table with columns: SUBJECT, PAGE, AUTHOR, STATUS, DATE. Below the table, it says "No Notifications Available".
- My Approval Status:** Includes a "Customize" link and a table with columns: SUBJECT, STATUS, PAGE, DATE. Below the table, it says "No Notifications Available".

To the right of these portlets, there is a section titled "This Is Your Personal Page" with the following text:

Your personal page provides you with a flexible, highly useful area within your portal where you can store and share content that's important to you. As the owner of your personal page, you can perform almost any page-related task.

To add content to your personal page, first click the Edit link. You can then [add items](#) and [portlets](#) to the page. To remove the text block you're currently reading: 1) Click Edit, 2) Click the Actions icons, 3) Select Hide or Delete, then 4) Click OK.

You can keep files, links, and other items for your personal use, or choose to share this information by [displaying your personal page to public users](#). Or you can choose to share your personal page only with [specific users or groups](#). If your personal page contains both private and public content, consider [creating sub-pages](#) to secure private content.

By default, your personal page uses a page template to control the layout. If you want to change the layout by [adding](#) or [removing regions](#), simply [detach the page from the page template](#)

For more information about editing your personal page, and pages in general, click the Help link.

To switch to Edit mode, simply click the Edit link. Although the complete range of editing tools is not available in the page portlet Edit mode, all the tools necessary for publishing content are accessible in this mode (see [Figure 2-2](#)).

Figure 2-2 A Page Portlet in Edit Mode



The page portlet offers a simplified edit mode that may be more suitable for some content contributors than the full page edit mode. The Edit Defaults customization of the page portlet (see [Figure 2-3](#)) allows the page designer to select the regions that are displayed in the page portlet, and to hide or show the Edit link. The page designer can select the subset of regions that contains the content that needs to be published, while hiding regions such as navigation bars, banners and other page

decoration that would typically not be relevant when the page is published as a portlet.

Figure 2–3 Page Portlet Edit Defaults Page

Page Portlet Settings

Use the Page Regions check boxes to select one or more regions to display in the portlet. If you clicked Customize on the portlet banner, you are the only one who will see the selections you make. If you clicked Edit Defaults, the selections you make will be visible to everyone who sees this page.

Display Name

Page Regions Display All Regions
 Display Selected Regions

<input type="checkbox"/>		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>		

Display Edit Link

Note: The Edit link appears only to users who are authorized to edit content on the page portlet (i.e., users who have the Manage Items With Approval privilege or higher on the page that is published as a portlet).

2.1.3 Adding Items to a Page

This section describes how to add some of the most common item types to your pages:

- [Adding a File or Document](#)
- [Adding Text to a Page](#)
- [Adding a URL Link to a Page](#)

In addition to these, you may often want to add images to pages. See [Section 7.6.1.1, "Adding Items"](#).

2.1.3.1 Adding a File or Document

You can upload and store files and documents in OracleAS Portal, such as HTML files, Microsoft Word documents, and spreadsheets. End users can then click the file or document on the page to view its content or download it to their computer.

To add a file or document:

1. Display the page on which you want to add the item.
2. Click **Edit**.
3. Click the **Add Item** icon in the region in which you want to add the item.

Note: If the add item icon does not display next to the region, the region may be a portlet region (and may contain portlets). You can only add items to an item region.

To add a subitem for an existing item, click the **Actions** icon next to that item and then choose **Add a subitem**.

4. From the **Content Item Types** list, choose a file-based item type, e.g. File or Simple File.

If the item type you are looking for does not appear in the list, contact your page group administrator. Your administrator sets up which item types to display here.

5. Click **Next**.
6. In the **File Name** field, enter or browse to the location of the file you want to display when the end user clicks the item's link.
7. In the **Display Name** field, enter the item's link text. This is what end users will click to view the item.
8. Specify other item attributes, as required.

It is important to enter descriptive item attributes, as the details entered here will help other users find your content and allow them to determine whether the item is of interest. See [Section 2.1.10, "Setting Item Attributes"](#).

The range of item attributes available, such as Author, Description, Image, New Item Indicator, etc. are determined by your page group administrator.

9. Click **Finish** to save your changes and return to the page.

2.1.3.2 Adding Text to a Page

You can add up to 32 KB of plain text, or embedded HTML, to a text-based item on a page. For example, you can use text items for:

- Browser Based Authoring, textual content, including HTML, can be added directly to portal pages by authoring the content in text items. If you are unfamiliar with HTML, you can use the embedded WYSIWYG rich text editor provided. Alternatively, you can enter HTML tags to format the content.
- In Place Display, text item content can be displayed directly on a portal page, rather than displaying a link to the content. This is useful when you want to add headings, announcements, news summaries, product descriptions, etc. to portal pages.

To add text:

1. Display the page on which you want to add the item.
2. Click **Edit**.
3. Click the **Add Item** icon in the region in which you want to add the item.

Note: If the add item icon does not display next to the region, the region may be a portlet region (and may contain portlets). In this case, you cannot add items to this region.

To add a subitem for an existing text item, click the **Actions** icon next to that item and then choose **Add a subitem**.

4. From the **Content Item Types** list, choose a text-based item type, e.g. Text or Simple Text.

If the item type you are looking for does not appear in the list, contact your page group administrator. Your administrator sets up which item types to display here.

5. Click **Next**.
6. In the **Text** field, enter the text you want to display.

If you are using Internet Explorer, a WYSIWYG editor may be available to enter text. See [Section 5.6.5, "Disabling the Rich Text Editor for Internet Explorer"](#).

- The text size is limited to 32 KB. Note that HTML tags within the text increase the size of the text item. If the text is larger than 32 KB, create another text item, or add the text as a file item.
- To display the current user's name in this item, you can enter the following in the Text field:
 - #USER#, for the user's name
 - #USER.FULLNAME#, for the user's full name
- If you want to include a link to another item or page in the portal, you can use a relative direct access URL. Using a relative URL means that the link will not break if the portal is moved to a different machine. For example, a relative URL to a page would look something like the following:

```
url/page/myportal/mypage
```

A relative URL to an item might look something like the following:

```
url/item/A47D41ECA23648A9E030007F0100118A
```

For more information about direct access URLs, see [Section 1.1.3.1, "Understanding Page and Item URLs"](#).

7. In the **Display Name** field, enter the item's link text. Users click this to view the text.
8. Specify other item attributes, as required.

It is important to enter descriptive item attributes as the details entered here will help other users find your content and allow them to determine whether the item is of interest. See [Section 2.1.10, "Setting Item Attributes"](#).

The range of item attributes available, such as Author, Description, Image, New Item Indicator, etc. are determined by your administrator.

9. Click **Finish** to save your changes and return to the page.

2.1.3.3 Adding a URL Link to a Page

You can add a link to another Web page, Web site, or document URL, either internal or external to the page group. To do this, you add a URL item to the page.

You can also add a URL link that links directly to an item in OracleAS Portal, by entering the direct access URL. See [Section 1.1.3.1, "Understanding Page and Item URLs"](#).

To add a link to a URL:

1. Display the page on which you want to add the URL item.
2. Click **Edit**.
3. Click the **Add Item** icon in the region in which you want to add the item.

Note: If the add item icon does not display next to the region, the region may be a portlet region (and may contain portlets). In this case, you cannot add items to this region.

To add a subitem for an existing URL item, click the **Actions** icon next to that item and then choose **Add a subitem**.

4. From the **Content Item Types** list, choose URL.

If the item type you are looking for does not appear in the list, contact your page group administrator. Your administrator sets up which item types to display here.

5. Click **Next**.
6. In the **URL** field, enter the URL address or HTML page that this item will be linked to.
 - If you want to add an e-mail link, enter the appropriate HTML code containing the person's e-mail address. For example, remove "http://" in the URL field and enter `mailto:user@company.com`.
 - If you want to link to another item or page in the portal, you can use a relative direct access URL. Using a relative URL means that the link will not break if the portal is moved to a different machine. For example, a relative URL to a page would look something like the following:

```
url/page/myportal/mypage
```

A relative URL to an item might look something like the following:

```
url/item/A47D41ECA23648A9E030007F0100118A
```

For more information about direct access URLs, see [Section 1.1.3.1, "Understanding Page and Item URLs"](#).

7. In the **Display Name** field, enter the item's link text. This is what end users will click to view the item.
8. Specify other item attributes, as required.

It is important to enter descriptive item attributes as the details entered here will help other users find your content and allow them to determine whether the item is of interest. See [Section 2.1.10, "Setting Item Attributes"](#).

The range of item attributes available, such as Author, Description, New Item Indicator, etc. are determined by your administrator.

9. Click **Finish** to save your changes and return to the page.

OracleAS Portal's direct access URL feature lets you share fully-formed URLs or relative URLs with other users so that they can quickly access OracleAS Portal objects such as pages, categories, perspectives, and documents. See [Section 1.1.3.1, "Understanding Page and Item URLs"](#).

If you, or other users have difficulty accessing URL items, ask your portal administrator to check that the proxy server for OracleAS Portal is set up correctly.

2.1.4 Hiding an Item

In some situations, you may want to hide an item from public and authorized users in View mode. For example, you may want to continue working on an item before you make it available to other users. If you hide an item, users are not able to see the item in View mode, however, you (and other users) can still access it in Edit mode.

If an item is not hidden, the item is displayed in View mode to all users who can access the page including public users (if the page is enabled to display to public users).

To hide an item:

1. Display the page containing the item you want to hide.
2. Click **Edit**.
3. Locate the item that you want to hide and click the **Actions** icon beside the item.
4. Click **Hide**.

If you copy a hidden item, the copied item is also hidden.

If you want your item to become available on a particular day and the Publish Date attribute is available, consider using this attribute rather than hiding the item.

When you set the Publish Date attribute to a future date, the item is hidden until the date you specify. See [Section 2.1.10.2, "Setting a Publish Date for an Item"](#).

2.1.5 Rearranging the Order of Items

You can change the order in which items are displayed in a region.

If items in a region are sorted by title or size, you cannot rearrange them and the Arrange Items icon is not displayed in the region toolbar. To rearrange these items, the page designer or a user with the appropriate privileges must edit the region's properties and select "Default" as the Sort By option.

To change the order of items:

1. Display the page containing the items you want to rearrange.
2. Click **Edit**.
3. In the region that contains the items that you want to rearrange, click the **Arrange Items** icon.
4. In the **Arrange Items** list, select an item and use the arrows to reorder it in relation to the other items in the list. Repeat this step for other items you want to rearrange.
5. When you are done, click **OK**.

2.1.6 Moving Items

You can move items to another page or to another region on the same page. To move an item to another page, you must have the appropriate privileges on both the page you are moving the item from and the page you are moving the item to.

Any sub-items associated with the item being moved are also moved to the new location.

Note: You can not move items to a region that contains portlets.

Moving a Single Item

To move an item:

1. Display the page containing the item to be moved.
2. Click **Edit**.
3. Locate the item that you want to move and click the **Actions** icon beside the item.
4. Choose whether to move the item to another page or to another region on the same page.
 - If you choose to move the item to another page, select the page to which you want to move the item, and click **Move Here**. Click **Move** to move the item.
 - If you choose to move the item to another region on the same page, select the region to which you want to move the item, and click **Move**.

Moving Multiple Items

To move multiple items:

1. Display the page containing items to be moved.
2. Click **Edit**.
3. Click the **List** editing view.
4. Select one or more items to move.
5. Click the **Browse Pages** icon and choose a destination Page.
6. Select **Move To**.
7. Use the radio buttons to select a new region for the item, and click **Move**.

2.1.7 Copying Items

You can create a new item by copying an existing item and editing its attributes. You can make multiple copies of an item and add the copies to various pages.

You must have the appropriate privileges on both the page from which you are copying the item, and the page to which you are copying the item.

When you copy an item, all of its translations are also copied.

Copying a Single Item

To copy an item:

1. Display the page that includes the item you want to copy.

2. Click **Edit**.
3. Locate the item you want to copy and click the **Actions** icon beside the item.
4. Click **Copy**.
5. Select the page to which you want to copy the item, and click **Copy Here**.
6. Use the radio buttons to select a new region for the item, and click **Copy**.

Copying Multiple Items

To copy multiple items:

1. Display the page that includes items you want to copy.
2. Click **Edit**.
3. Click the **List** editing view.
4. Select one or more items to copy.
5. Click the **Browse Pages** icon and choose a destination Page.
6. Select **Copy To**.
7. Use the radio buttons to select a new region for the item, and click **Copy**.

2.1.8 Deleting Items

When you delete an item on a page, the item is removed from the page and permanently removed from OracleAS Portal.

In some cases, deleted items may be restored. Check with your page group administrator before deleting items to see if the restore option (Retain Deleted Items' is available. See [Section 2.1.9, "Restoring a Deleted Item"](#).

Note: If you delete an item that has sub-items, all of the item's sub-items are also deleted.

Deleting a Single Item

To delete an item:

1. Display the page containing the item to be deleted.
2. Click **Edit**.
3. Locate the item you want to delete and click the **Actions** icon beside the item.

4. Click **Delete**.
5. Click **Yes** to confirm.

Deleting Multiple Items

To delete multiple items:

1. Display the page containing the items to be deleted.
2. Click **Edit**.
3. Click the **List** editing view.
4. Select one or more items to delete.
5. Select **Delete**.
6. Click **OK** to confirm.

2.1.9 Restoring a Deleted Item

Your page group can be set up to retain deleted items in Edit mode and allow such items to be restored. If the restore option is not available, check with your page group administrator.

To restore a deleted item:

1. Display the page that contains the deleted item.
2. Click **Edit**.
3. Locate the item that you want to restore and click the **Actions** icon next to the item.
4. Click **Undelete**.

2.1.10 Setting Item Attributes

Item attributes are used to store information about the item (item metadata) such as the associated category, description, or perspectives. The range of attributes available for an item are determined by your page group administrator. See [Section B.2, "Base Attributes"](#) for a list of all the built-in attributes. In addition to these, page group administrators can create their own attributes for storing extra information.

To view/change item attribute settings, click the Edit icon displayed next to the item. Some of the more common item attributes are described in the following sections:

- [Classifying the Content of an Item](#)
- [Setting a Publish Date for an Item](#)
- [Setting Expiration Details for an Item](#)
- [Using Item Check Out/Check In](#)

2.1.10.1 Classifying the Content of an Item

When you add items to a page it is important to classify their content. This is useful as the details entered here will help other users find your content and allow them to determine whether the item is of interest.

For example you can assign each item to a category, perspective(s) and assign keywords that describe the content, or purpose of the item.

The range of item attributes available, such as Author, Description, Image, New Item Indicator, etc. are determined by your page group administrator. Some of the most common item attributes are described in the following sections:

Changing the Category of an Item

An item may be assigned to a category. At any time, you can change an existing item's category.

To change the category of an item:

1. Display the page containing items for classification.
2. Click the **Edit** link.
3. Click the **Edit** icon beside the item that includes the category that you want to change.
4. Choose another category from the **Category** list.
5. Click **OK**.

Changing the Perspectives of an Item

An item may be assigned to one or more perspectives. Perspectives describe the audience or interest area for the item. At any time you can change the perspective(s) of an existing item. Unlike categories, you can choose more than one perspective for

an item. For example, a sales report might belong to both the Sales Representative and Marketing Manager perspectives.

To change the perspectives of an item:

1. Display the page containing items for classification.
2. Click the **Edit** link.
3. Click the **Edit** icon beside the item that includes the perspective that you want to change.
4. Use the left and right arrow icons to move a perspective from the **Available Perspectives** to the **Displayed Perspectives** list.

You can select multiple perspectives by holding the Ctrl key while clicking each perspective.

5. Use the appropriate up and down arrows to determine the order in which the perspectives are to be displayed.
6. Click **OK**.

Changing the Search Keywords for an Item

An item can be assigned one or more keywords that describe the content, or purpose of the item. When a user performs a search, the user's search criteria is compared to the keywords in items and pages to find a match.

To change search keywords for an item:

1. Display the page containing items for classification.
2. Click the **Edit** link.
3. Click the **Edit** icon beside the item that includes the keywords that you want to change.
4. In the **Basic Search Keywords** field, add or change one or more keywords that accurately describe this item.
5. Click **OK**.

2.1.10.2 Setting a Publish Date for an Item

You can add items to a page in advance, but display it in View mode to other users, on a specified date in the future. For example, you could add a file item for a document that discusses next month's Sales Targets and set the future publish date.

To set publish date details for an item:

1. Display the page containing the item.
2. Click **Edit**.
3. Locate the item that you want to publish at a future date and click the **Edit** icon beside the item.
4. In the **Publish Date** field, enter the exact date and time on which this item is displayed in View mode. For example, the format for the US language is DD-MON-YYYY HH12:MI PM.
5. Click **OK**.

2.1.10.3 Setting Expiration Details for an Item

You can set an expiration period for an item so that the item automatically expires at the specified time, or you can expire an item instantly.

In some cases, expired items may be restored after the expiration period. Check with your page group administrator if the restore option is not available. See [Section 2.1.9, "Restoring a Deleted Item"](#).

Note: If there are multiple versions of an item, all versions expire when the expiration period is reached.

Setting Expiration Details for an Item

To set expiration details for an item:

1. Display the page containing the item.
2. Click the **Edit** link.
3. Locate the item that you want to expire and click the **Edit** icon beside the item.
4. In the **Expiration Period** section, choose whether this item is always available, available only for a specified number of days, or if it expires on a certain date and time. For example, the format for the US language is DD-MON-YYYY HH12:MI PM.
5. Click **OK**.

Expiring Multiple Items

To expire more than one item:

1. Display the page containing the items.

2. Click **Edit**.
3. Click the **List** editing view.
4. Select the items that you want to expire and then select **Expire** from the list of actions.
5. Click **Go**.

Expiring an Item Instantly

This feature is useful if the Expiration Period attribute is not available.

To expire an item instantly:

1. Display the page containing the item.
2. Click **Edit**.
3. Locate the item that you want to expire and click the **Actions** icon beside the item.
4. Click **Expire**.

Restoring an Expired Item

Your page group can be set up to display expired items in Edit mode and allow such items to be restored. If the restore option is not available, check with your page group administrator.

To restore an expired item:

1. Display the page containing the expired item.
2. Click the **Edit** link.
3. Locate the item that you want to restore and click the **Actions** icon beside the item.
4. Click **Un-Expire**.

You can un-expire multiple items in List editing view.

2.1.10.4 Using Item Check Out/Check In

Item checkout provides document control for items that are managed by multiple users. When a user checks out an item, the item is "locked" and other users cannot edit the item. Other users can only view the item, not modify it. With the appropriate privileges, users can copy checked-out items.

After the user checks in the item another user can check out the item and edit it. This prevents users from overwriting each other's changes.

Note: If an item is submitted for approval, the item is automatically checked out so that other users cannot edit it. The item is not checked back in until it is approved or rejected. See [Section 2.4, "Working With Approvals"](#).

Enabling Item Check Out/Check In

To enable item check out/check in:

1. Display the page containing your items.
2. Click the **Edit** link.
3. Locate the item for which you want to enable check out/check in and click the **Edit** icon beside the item.
4. Select **Enable Item Check-Out**.

Contact your page group administrator if this attribute is not available.

5. Click **OK**.

Checking Out an Item

To check out an item:

1. Display the page containing your items.
2. Click the **Edit** link.
3. Locate the item that you want to check out and click the **Actions** icon beside the item.
4. Click **Check Out**.

The item is now checked out. Other users cannot edit the item.

While you have an item checked out, you can edit the item by clicking the Edit icon next to item. You can also perform many actions on the item, such as hide, move, copy, and expire. Click the **Actions** icon beside the item to see the list of actions.

When you have finished working with the item, remember to check in the item so it is available to the other users.

Note: If you copy an item when it is checked out, the new copied item is checked in.

Checking In an Item

To check in an item:

1. Display the page containing your items.
2. Click **Edit**.
3. Locate the item that you want to check in and click the **Actions** icon beside the item.
4. Click **Check In**.

Only the user who checked out the item can check in the item.

5. If necessary, upload a new version for the item to be checked-in. Click the **Edit** icon besides the item, use the File Name Browse button to locate the new version and then click **OK**.
6. Click the **Actions** icon beside the item.
7. Click **Check In**.

The item is now available for other users to edit.

2.2 Using Version Control

Item versioning allows multiple versions of an item to simultaneously exist in the Oracle database. This feature is useful for tracking document changes from one version to the next or for reverting to a previous version if necessary.

OracleAS Portal provides item version control for page groups and individual pages. See [Section 5.6.2, "Setting the Item Versioning Level for a Page Group"](#) and [Section 7.8.8, "Setting the Item Versioning Level for a Page"](#). When version control is enabled for items on a page, you can change the version control settings for individual items.

Changing Version Control Options for an Item

To change version control options for an item:

1. Display the appropriate page.
2. Click **Edit**.

3. Locate the item that requires version control option changes and click the **Edit** icon beside the item.
4. In the **Item Version Control** radio group, select the item version control option you want to apply to this item.
 - Simple
 - Add Item As New version, but not as Current Version
 - Add Item As New and Current Version
 - Overwrite Current Version

For the first two options, OracleAS Portal maintains a record of the item's previous versions.
 - Audit
 - Add Item As New version, but not as Current Version
 - Add Item As New and Current Version

For both of these options, OracleAS Portal maintains a record of the item's previous versions.
5. Click **OK**.

Changing the current version of an item

To change the current version of an item:

Once you have multiple versions of an item, you may want to change which version of the item is displayed to users, or is the "current" version.

1. Display the appropriate page.
2. Click **Edit**.
3. Locate the item that requires version changes and click the **Actions** icon beside the item.
4. Click **Versions**.
5. Select the version that you would like for the current version, and click **OK**.

The selected version of the item is now displayed to users. All other versions are maintained in the database, and are available if you want to choose another version as the current version in the future.

2.3 Protecting Your Content

If item level security is enabled on your page you can grant access privileges to individual items.

Note: Item level security is a mechanism which allows controlled and granular access to specific items in a page. See [Section 7.12, "Protecting Your Content"](#)

As a content contributor, when you add a new item to a page, you can decide if you want to make the item accessible to certain users or groups. Users or groups who are not on the item's access control list are not able to view or edit the item.

Note: You must be logged on as an authorized user with the Manage Item or higher privileges on the item. Only the item creator or owner can grant access privileges to a specific item.

Table 2–1 *Item Privileges*

Item Privileges	Description
Manage	A user with the Manage privilege can view the item, edit the item, delete the item, and grant privileges on the item. Note that the Manage privilege does not allow a user to add sub-items under the item. Only users with the Manage Items With Approval or higher privileges on the page can add sub-items.
Edit	A user with the Edit privilege can view the item, edit the item, and delete the item.
View	A user with the View privilege can view the item only

Granting Access Privileges on an Item

To grant access privileges on an item:

1. Display the appropriate page.
2. Click **Edit**.
3. Locate the item for which you want to grant access and click the Edit icon beside the item.

4. Click the **Access** tab.
5. In the **Item Level Security** section, select **Define Item Level Access Privileges**.

Note: If you select Inherit Parent Page Access Privileges, the item has the same access privileges as those set for the parent page.

If the item has multiple versions, this setting is applied to all versions of the item, not just the one that you are editing.

6. Click **Apply**.

Note: The Access tab now includes two new sections: Grant Access and Change Access.

7. In the Grant Access section, enter the name of the user or group to which you want to assign privileges. If you do not know the name of the user or group, click the **Browse Users** icon to display a list of existing users or the **Browse Groups** icon to display a list of existing groups from which to choose.

Note: Adding a group instead of a user saves you time if you want to grant the same access privileges to multiple users. If you do not see the group name in the access list, you can create a group.

When item level security is enabled, an item creator can grant the Manage Item privilege to more than one user. However, page group administrators, page owners, and authorized users with the Manage Items privilege have the highest level privilege on all items in the page. They cannot have their privilege superseded by an item level privilege.

8. Beside each user name, choose which item level privileges you want to grant to each user or group from the drop down list of Privileges.
9. Click **Add** to see the user or group reflected in the Change Access section
10. In the Change Access section, you can choose a different item level privilege, or revoke item privileges from users or groups.
11. Repeat steps 7-10 for each user or group you want to add to the item access list.

12. When you are done, click **OK**.

Note: If a user is a member of two different groups with different privileges on the same item, the user is granted a combination of these privileges. For example, if you have Manage Template privileges from one group and Manage Style privileges on another you can manage both templates and styles for an item.

To revoke the user or group's access, click the Delete icon next to the **Grantee Name**.

Because Oracle Internet Directory (OID) can include multiple directory containers that use the same group names, the distinguished name (DN) is displayed next to any group that does not belong to the local OracleAS Portal instance.

Item level security cannot be disabled for items in the Portlet Repository page group.

2.4 Working With Approvals

This section contains the following sub-sections:

- [Submitting Content for Approval](#)
- [Approving or Rejecting Content](#)

2.4.1 Submitting Content for Approval

OracleAS Portal includes a special privilege "Manage Items with Approval". If you have this privileges on a page you can add items to the page but the items do not become visible to other users until they have been approved. The users responsible for approving the items are specified in the page or page group's approval process. See [Section 7.9, "Setting Up an Approval Chain"](#) for more information.

For example, if all product whitepapers must be reviewed by your legal department before they are published you may have an approval process set up that includes the legal department as one of the required approvers.

2.4.1.1 Using the Pending Items Preview Mode

Use the Pending Items Preview mode to preview your items that are pending approval directly on the page.

Figure 2–4 The Pending Items Preview Mode

You can access this mode by clicking Pending Items: Preview when editing a page.

New items are displayed with the status Pending and such items are not displayed in other page editing modes (such as Graphical or Layout, only in Pending Items Preview mode).

Updated items are displayed with the status Update Pending. This mode displays the updated item, whereas other editing modes display the existing item.

Essentially, this mode provides a way to view new or updated items which require approval before they are published to a wide audience.

Resubmitting Rejected Items

If your item is rejected, you can edit the item and then resubmit it for approval. Click the Edit icon, next to the rejected item to make your changes. After you edit the item, it will be resubmitted for approval.

Deleting and Un-deleting Rejected Items

You can delete rejected items if you wish. To do this, click the Actions icon next to the item and click Delete.

Additionally, you can un-delete a rejected item that was deleted by clicking the Actions icon next to the item and then Undelete. If you do this, the item returns to a rejected status.

2.4.1.2 Customizing the My Approval Status Portlet

You can track the progress of your item approvals using the Approval Status portlet. In the portlet, click the subject to view the item, click the status to view the approval history, and click the page name to view the page that includes the item.

Figure 2–5 The My Approval Status Portlet

My Approval Status				Customize
SUBJECT	STATUS	PAGE	DATE	
Marketing report for September	APPROVED	PAGE/PG3/	30-NOV-2001	
Marketing report for August	REJECTED	PAGE/PG3/	30-NOV-2001	
Marketing report for July	APPROVED	PAGE/PG3/	30-NOV-2001	

If you have the appropriate privileges on the page, you can customize the title of the My Approval Status portlet and the way status information is displayed. To do this, click the Customize link and set the options as required.

2.4.2 Approving or Rejecting Content

After a user with the Manage Items With Approvals privilege adds or modifies an item, approvers in the approval process receive a message in the My Notifications portlet indicating that an item requires an approval.

Approval notifications are sent to the list of approvers identified in an approval process step. An approver may respond to the notification by approving or rejecting the item in question.

2.4.2.1 Customizing the My Notifications Portlet

You can customize the My Notifications portlet.

Figure 2–6 The My Notifications Portlet

My Notifications						Customize
TYPE	SUBJECT	PAGE	AUTHOR	STATUS	DATE	
	HR spreadsheet	pg1	MVA1	Request Pending	15-AUG-2002 11:41 AM	
	meeting notes	pg1	MVA1	Request Pending	15-AUG-2002 11:05 AM	
	corporate URL	pg1	MVA1	Request Pending	13-AUG-2002 02:28 PM	
	field newsletter	pg1	MVA1	Request Pending	13-AUG-2002 07:22 AM	
	sales data	pg1	MVA1	About to Expire	17-AUG-2002 12:00 PM	
	marketing report	pg1	JALU	About to Expire	17-AUG-2002 08:52 AM	
	(Subscribe)	pg1	JALU	New Item	15-AUG-2002 08:55 AM	
	www	pg1	JALU	Item Expired	15-AUG-2002 08:54 AM	
	home page graphic	pg1	JALU	New Item	15-AUG-2002 08:52 AM	

To customize the My Notifications portlet:

1. Edit the page to that contains the My Notifications portlet.
2. Click the **Customize** link.
3. In the **Display Name** field, enter a different title for the portlet if required. For example, if the portlet will be used only to display approval notifications, you might change the display name to Items Requiring My Approval.
4. In the **Display Limit** radio group, select whether to display all notifications or limit the portlet to display only a specified number of notifications.
5. Make sure the **Show Approval Notifications** check box is selected.

The portlet can also display expiry and subscription notifications.

6. Select the **Display Notification Type Icon in Portlet** check box if you want to display an icon to illustrate whether the notification is an approval, expiry, or subscription notification. This is useful if you intend to use the portlet to display other types of notifications.
7. Select the **Display Notification Status in Portlet** check box if you want to display the status of the notification in the portlet. This is useful if you intend to use the portlet to display other types of notifications. For approval notifications there is only one status: Request Pending.
8. Click **OK**.

2.4.2.2 Approving or Rejecting an Item

When there is an item that requires your approval, you receive a notification in the My Notifications portlet. You must decide whether to approve or reject the item. If you approve the item, a notification is sent to the next approver in the approval process. If you are the final approver in the approval process, the item will be published to the portal after you approve it. You may also decide to reject the item. If you reject the item, the approval process is halted even if there are remaining steps (approvers). After you approve or reject the item, the notification is removed from the My Notifications portlet.

In the My Notifications portlet, the approver can click the subject title to display the approval page. From this page, the approver can view the item, enter comments, and decide whether to approve or reject the item. The approver can also view the approval history of the item.

The powers of approval and rejection are distributed as follows:

- You must be one of the current approvers, a page group administrator, or a page or content manager (with the Manage or Manage Content privilege on the page), to approve or reject an item.
- An approver can also approve (or reject) an item directly on its page using the Pending Items: Preview mode. See [Section 2.4.1.1, "Using the Pending Items Preview Mode"](#).
- The portal administrator can approve or reject any pending item.
- Page group administrators can approve or reject any pending item in their page groups from Pending Items: Preview mode, or from the Pending Approvals Monitor portlet.
- Page or content managers (with the Manage or Manage Content privilege on the page) can approve or reject any pending item on their pages from Pending Items Preview mode, or from the Pending Approvals Monitor portlet.
- If you do not have the appropriate access privileges for the page that includes the item you approved or rejected, you will be redirected to the OracleAS Portal home page after you approve or reject the item.

Approving an Item

To approve an item:

1. In the My Notifications portlet, click the item's subject (see [Figure 2-6](#)) to access the Approval Notifications Detail page.
2. To review the item, click the **Item Link**.
3. Enter your approval comments and click **Approve**.

Rejecting an Item

To reject an item:

1. In the My Notifications portlet, click the item's subject (see [Figure 2-6](#)) to access the Approval Notifications Detail page.
2. To review the item, click the **Item Link**.
3. Enter your rejection comments, and click **Reject**.

Alternatively, you can use the Pending Items Preview mode to approve or reject items. To access this mode, click the Pending Items: **Preview** link in the page. Click the **Approve** icon next to a Pending item to access the Approval Notifications Detail page, where you can approve or reject the item.

What If an Item Is Rejected?

If you created the item that is rejected, the item appears in your My Approval Status portlet with a "Rejected" status. Also, when you view the page that includes the item in Pending Items: Preview mode, you will see that the item was rejected. You, as the item creator, can edit the rejected item from the Pending Items: Preview mode. After the item is edited, it is automatically resubmitted for approval.

A rejected item can be deleted by the item creator, the page group administrator, or a page or content manager (with the Manage or Manage Content privilege on the page). The item's status changes to "Deleted." A rejected item that was deleted can be un-deleted, provided it hasn't been purged. When you un-delete a rejected item, the item's status changes back to "Rejected." Rejected items that are deleted will be purged when all other deleted items are purged in the page group.

Page group administrators can also edit rejected items. However, this editing does not change a rejected item's status. All actions performed on the rejected item appear in the approval history for the item.

2.5 Publishing Files Using a WebDAV Client

OracleAS Portal supports the use of a Web-based Distributed Authoring and Versioning protocol (WebDAV). Using a WebDAV client, such as Web Folders, you can seamlessly drag and drop content, files, and folders back and forth between the desktop and the page groups in OracleAS Portal. You can also perform in-place opening, editing, and saving of file-type items using desktop applications, such as Microsoft Office 2000.

WebDAV also has Java clients (such as DAV Explorer), open source tools (such as Cadaver and Sitecopy), Apple GUI tools (such as Goliath), and commercial authoring tools (such as Macromedia Dreamweaver and Adobe Photoshop). You can also use browsers such as Mozilla or Internet Explorer 5.5 to browse OracleAS Portal content in a hierarchical structure.

The following sections describe how you can access OracleAS Portal from a WebDAV client and the actions that OracleAS Portal supports such as viewing, copying, moving, deleting content, etc. This is followed by detailed explanations of how you can add content using some popular WebDAV clients, such as Web Folders, Microsoft Office 2000 and Macromedia Dreamweaver:

- [Setting Up Your WebDAV Client](#)
- [Using Your WebDAV Client to Access Your Portal](#)
- [Example: Using Web Folders to Add Content to a Page](#)

- [Example: Using Microsoft Office 2000 to Edit the Content of a Page](#)
- [Example: Using Dreamweaver to Edit the Content of a Page](#)

To use these features WebDAV must be set up on both the server side (in OracleAS Portal) and the client side. Check with your portal administrator.

Note: We recommend that any single user does not perform operations on a single item (or its sub-items) using a concurrent combination of WebDAV clients and the portal itself. For example, if a user locks a file using a WebDAV client and then edits the related item in the OracleAS Portal user interface, there may be unexpected results.

2.5.1 Setting Up Your WebDAV Client

The steps required to set up a WebDAV client to connect to your portal varies depending on the client. But all clients will eventually request a URL. The WebDAV URL is very similar to the URL you use to access the portal itself in your Web browser, and uses the following format:

```
http://<hostname>:<port>/<dav_location>
```

Where `dav_location` is the location as specified in the `oradav.conf` file.

The default portal DAV URL is:

```
http://<hostname>:<port>/dav_portal/portal
```

The `dav_portal` part of the URL is the default name of a virtual directory used to differentiate between portal access via a WebDAV client and portal access which uses the `pls` virtual directory. `portal` is the DAD of the portal installation. Administrators can also configure virtual hosts to provide a different, simpler, or easier to remember URL for WebDAV access, if need be.

You can also directly access a particular page group or page by adding its name to the WebDAV URL, for example:

```
http://mymachine.mycompany.com:5000/dav_portal/portal/myportal/mypage
```

You connect to a portal in WebDAV clients using the same user name and password that you use to log in to the portal itself. If the portal is in a hosted environment, you also need to add your company information to your user name, as follows:

```
<username>@<company>
```

OracleAS Portal's Single Sign-On functionality does not apply for WebDAV clients. So, even if you are logged in to the portal itself, you will still need to explicitly login from the client.

If you are using Web Folders on Windows 2000, you may be prompted for your user name and password twice. Once when you click Next after specifying the WebDAV URL and again when you click Finish.

Some WebDAV clients (e.g., Windows 2000 or NT) do not support multiple simultaneous log ins. If you want to log in as a new user, you will need to clear your cookies, restart your computer to clear out the current login session, then log in as the new user.

If your WebDAV client has no explicit logout feature, you will need to logout from the operating system (like in Windows 2000 or NT) to logout from the portal.

2.5.2 Using Your WebDAV Client to Access Your Portal

This section describes the actions that OracleAS Portal supports using WebDAV clients. Since not all WebDAV clients behave the same way, only a subset of these actions may be allowed for a particular client. For example, you can check items in and out if the WebDAV client supports the WebDAV LOCK method (Web Folders does not currently support locking operations, Office 2000 clients support implicit locking operations, Cadaver and Dreamweaver support explicit locking operations).

Performing the actions described below has the same effect as performing them in OracleAS Portal. If you make a change from a WebDAV client it is instantly visible in OracleAS Portal, providing the change is not subject to an approval process. You may need to refresh the portal page to see your changes.

When performing actions using WebDAV clients, you may encounter error messages that do not seem to be appropriate for the action. For example, in Web Folders when creating a new version of an item you may get an error message that implies the item will be overwritten rather than a new version created. Also in Web Folders, you may get an error message when moving an item asking you to verify that you want to delete the file. This is because of the underlying behavior of the client and does not affect the actual action that is being performed.

2.5.2.1 Listing Content

Once connected to OracleAS Portal, all the page groups you have privileges to see are visible as folders at the root level (the folders actually represent the root pages of the page groups).

To be able to see a page group, you must be able to view the root page of the page group. All authenticated users should see at least the Corporate Pages page group. Additionally, if you have a personal page in the Shared Objects page group, you should be able to see Shared Objects and access your personal page through the WebDAV client.

If you drill down a page group you see a list of all the pages inside the page group as folders. Similarly, if you drill down a page folder, you see a list of the page's sub-pages and all items (and sub-items) of the following types: File or Simple File, Image, Simple Image, Image Map, Zip File, custom types based on the Base File, Base Image or Base Image Map item types.

To see items in a WebDAV client, you must have at least the View privilege. You will see the current version of the item in the page group's default language only (that is, the language in which the page group was originally created). Translations of items are not visible in WebDAV clients.

You see only the primary document attribute associated with each item. Any other files (i.e., secondary files or images) associated with the item (for example, the item image), are hidden in the WebDAV client. If you want to delete or change these files, you must do so in OracleAS Portal.

In WebDAV clients there is no differentiation between items and sub-items.

Unpublished items (i.e., expired items, hidden items, items with a future publish date, and deleted items that are still displayed on a page) are also visible in WebDAV clients.

The file and folder names displayed in the WebDAV client are the actual names of the files or folders (not the internal names of the items or pages). The internal name is similar to the actual name, except it is all uppercase and may include additional characters (`_0`, `_1`, etc.) to ensure uniqueness.

OracleAS Portal is case-sensitive for file and folder names (e.g., `aaa.htm` and `AAA.htm` are treated as different items). If your WebDAV client is not case-sensitive (e.g., Web Folders), `aaa.htm` or `AAA.htm` may not be accessible or the client may confuse one for the other. Therefore, when using such clients, do not use a naming convention that relies on case.

Templates, regions, and tabs are not currently represented. Because these are not represented, their content is not represented. You will not be able to see items that are contained within tabs or items that are inherited from page templates. This also means that if a file is placed on a tab in OracleAS Portal, that item will not display in a WebDAV client. We recommend that tabs are not used in pages that are intended for use with WebDAV clients.

2.5.2.2 Viewing Content

Most WebDAV clients allow you to view the content of a file by clicking on the name. In Windows 2000 or NT, the behavior is very similar to clicking a file on the local machine; the operating system opens it in the application associated with the file type.

If you are using a Microsoft Office application to browse portal content, be aware that when you open a file, that file is locked in the WebDAV client and checked out in the portal. Therefore other users will not be able to edit the file until you have closed it. When you close the file, it is unlocked and checked back in. If versioning is enabled, a new version will be created.

Some desktop applications may have difficulty opening files that use special characters in the file name. We recommend that file names use only alphanumeric characters (A-Z, a-z, 0-9), spaces, and the following special characters: _ - . () ! , ; = ~ @ [] { } ^ \$ +.

2.5.2.3 Moving, Copying and Editing Content

To move, copy, or edit files, you must have at least the Manage Content privilege (or the Manage Items With Approval privilege if approvals are enabled).

With WebDAV-enabled desktop applications, such as Microsoft Office 2000, you can open a file, edit it directly, and then save it to the same location, using the same name. With other applications, you can save the file to the local file system and drag and drop the new file to OracleAS Portal. The next time the file is opened from OracleAS Portal, the edited version will be displayed.

When content contributors move or copy a file, the whole item associated with that file is moved or copied, including associated files (for example, the item image) and any sub-items. If a sub-item is copied, the copy is created as a top-level item.

2.5.2.3.1 Item Types and Attributes Your page designer can specify what item types to use for new files published to OracleAS Portal through WebDAV. For example, the page designer might want any zip files published to OracleAS Portal to be uploaded as Zip File items, so that their contents can be extracted into the page group. If the default item type includes the Category attribute, new items added through WebDAV clients are assigned to the General category. See [Section 7.8.7, "Choosing Default Item Types for Files Uploaded Via WebDAV"](#) for more information.

When you edit or move an existing item using WebDAV, that item retains its original item type and attribute settings. Similarly, when you copy an item using WebDAV, the copy uses the item type and attribute settings of the original item. You

cannot edit an item's attributes in OracleAS Portal's WebDAV server. To do this, you must edit the item in OracleAS Portal.

2.5.2.3.2 Versioning Support OracleAS Portal's WebDAV server supports Audit versioning. If your page is set up to use Audit versioning and you use a WebDAV client to edit an item on the page, a new version of the item is created. The new version is always set to the current version, which is always displayed in WebDAV. If you do not want the new version to be the current version, you must edit the item in OracleAS Portal.

If a page uses Simple versioning and you use a WebDAV client to edit an item on the page, a new version of the item is created and set to the current version. You cannot choose to overwrite the previous version of the item. To overwrite the previous version of the item, you must edit the item in OracleAS Portal.

In some clients, e.g., Windows 2000, the message you receive when you add a new version of an item may imply that you are overwriting the file rather than adding a new version. This is a limitation of the client's messaging. If Simple or Audit versioning is enabled for the page, replacing a file in the WebDAV client will always create a new version.

2.5.2.3.3 Approvals Support OracleAS Portal's DAV server also supports approvals. If you add an item to a page using a WebDAV client, the approval process for the page or page group is triggered. The content of the item does not become visible to other users until it has been approved. They may be able to see the item listed (as a zero-byte file) in the WebDAV client before it has been approved, but they will not be able to see the actual content of the item until it has been approved. This prevents other users from creating items with the same file name, potentially overwriting a pending item. The item cannot be updated in the WebDAV client until it has been approved or rejected.

If approvals are enabled, when a user updates an item using a WebDAV client, other users will continue to see the non-updated item until such time as the updates are approved. The user who updated the item will see the updated item, even before it is approved. However, if a user updates an item using the OracleAS Portal user interface, all users (including the user who updated the item) will see the non-updated item in WebDAV clients until the updated item is approved.

Note: The point at which the approval process is triggered depends upon the WebDAV client being used. For example, in Microsoft Word, when a file is opened it is automatically locked. The approval process will not be triggered until the file is unlocked (i.e., when the file is closed). Therefore, simply saving the file does not trigger the approval process. You must perform the action that causes the client to unlock the file, thus triggering the approval process.

2.5.2.3.4 Additional Tips

- The target page must contain at least one item or one undefined region. If a page has more than one item region, the page designer can specify one of those regions as the default item region.
 - When you add an item to the page using WebDAV, the item is placed in the page's default item region. If the target page is based on a page template, the default item region is determined by the default item region of the template.
 - If a default item region has not been specified, the item is placed in the second item region on the page (or the first if there is only one item region). The second item region is used to avoid placing items in a region intended for navigation elements.
 - If there are no item regions on the page, the item is placed in the first undefined region on the page (and that undefined region then becomes an item region). If the page is based on a template that contains no item regions, users cannot add content to the page, even if it contains undefined regions.
 - All pages, including those with no item regions, are visible on the WebDAV side. Moving or copying an item into a page with no item or no undefined regions produces an error.
 - The default item region applies to new items only. For example, if the default item region for a page changes and an item on that page is subsequently edited, the item will remain in its current region; it will not be moved to the new default item region.
- Pages created from a WebDAV client automatically include an item region.

- You cannot use WebDAV to add items to pages that are based on a seeded page template (those templates provided when OracleAS Portal is installed).
- You cannot add files to tabs in pages. If a page consists entirely of tabs, you cannot add items to the page even though it is listed in the WebDAV client.
- You can move and copy files and pages to other pages within the same page group. Copying files and pages across page groups is not supported in OracleAS Portal. To perform this action using WebDAV, copy the files or pages to your local file system, then copy them from the file system to the target page group.
- In Web Folders, depending on your operating system, you cannot copy a file into the same folder. For example, in Windows 2000, dragging an item from the right pane into the same folder in the left pane will raise an error. In Windows NT, using the copy and paste commands to copy a file into the same folder will have no effect.

2.5.2.4 Deleting Content

When you delete a file in a WebDAV client, the whole item associated with that file is deleted from OracleAS Portal. This means that any other files that are associated with the item (for example, the item image) are also deleted, as well as all sub-items, versions and translations of the item.

If you mark an item for deletion in OracleAS Portal but it is not yet deleted from the database, the item will still be visible in WebDAV clients.

If you delete an item using a WebDAV client, the item is permanently deleted even if the page group is set to retain and display deleted items.

2.5.2.5 Checking Content Out and In

If the WebDAV client supports locking and unlocking (e.g., Dreamweaver and Office 2000), you can lock a file, which in turn will check out the item (the OracleAS Portal equivalent of the WebDAV LOCK method) attached to the file. Once a file is locked from a WebDAV client, no-one else can make changes to it until it is checked back in by the same WebDAV client. Even the user who locked the item cannot make changes to the file using a different WebDAV client or the portal itself. The unlock token is owned by the client that locked the file, so the file must be unlocked by the same WebDAV client (on the same machine) that locked the file.

After you have made the required changes to the file, you can unlock it, which in turn checks in the item (the OracleAS Portal equivalent of the WebDAV UNLOCK

method) attached to the file. Other users will then be able to make their own changes to the file.

See [Section 2.5.5, "Example: Using Dreamweaver to Edit the Content of a Page"](#) for more information.

2.5.2.5.1 Additional Tips

- You cannot check folders in or out, or recursively check out the contents of a folder.
- You cannot move, copy, or delete a page if an item in that page, or in one of its sub-pages, is locked through another WebDAV client or by another user. In addition, these operations can be performed only using the same WebDAV client that locked the item can perform these operations.
- If you lock a file attached to a sub-item, other users will be able to use a WebDAV client to delete the parent item (and thus the sub-item) even though they do not own the unlock token for the sub-item. This is because WebDAV clients do not support the OracleAS Portal item hierarchy.
- If you check an item out in OracleAS Portal, you can not update the item in a WebDAV client. This is because OracleAS Portal uses a different locking model from WebDAV. OracleAS Portal locks items based on user names, whereas WebDAV locks resources based on specific lock-keys. When you check out an item in OracleAS Portal, it is locked in the WebDAV domain with a specific key. Only OracleAS Portal (not the individual user) has the key to unlock the item. Even the user who checked the item out needs to check the item in again before he or she can operate on it using a WebDAV client.

For example, when Scott checks out File1 in OracleAS Portal, the portal keeps a record that Scott has checked out File1 and the OracleAS Portal WebDAV server locks File1 and holds onto the related lock token. Scott can log on OracleAS Portal using any Web browser and check File1 back in but he cannot use a WebDAV client to unlock the item because the OracleAS Portal WebDAV server (not Scott's WebDAV client) has the lock token.

2.5.2.6 Creating OracleAS Portal Pages and Sub-pages

Using a WebDAV client, you can create and delete pages within existing page groups providing you have the appropriate privileges. For example, in Web Folders, go to the folder for the page where you want to create a sub-page, right-click the folder and choose New>Folder. All the pages you create using WebDAV clients are Standard pages and contain an item region.

2.5.2.6.1 Additional Tips

- Page names can contain any alphanumeric character (A-Z, a-z, 0-9), spaces, and the following special characters: _ - . () ! , ; = ~ @ [] { } ^ \$ +. Consequently, to paste a folder from the file system into OracleAS Portal, it and all sub-folders that it contains must use only these characters.
- The folder name displayed in the WebDAV client is the actual name of the folder (not the internal name of the page). The internal name is similar to the actual folder name, except it is all uppercase and may include additional characters (_0, _1, etc.) to ensure uniqueness within the page group.
- You cannot create, edit, or delete page groups through WebDAV. These actions must be performed in OracleAS Portal.
- You cannot create tabs through WebDAV.

2.5.2.7 Viewing Errors

Any errors that occur while you are using a WebDAV client with OracleAS Portal are recorded in an error log. The error log is created the first time an OracleAS Portal related WebDAV error occurs and it is placed on your personal page as an item titled My Error Log. This can be very helpful for interpreting the error messages reported in WebDAV clients, such as the message 'An error has occurred while trying to complete this operation' that is often displayed in Web Folders, or HTTP error numbers reported in Cadaver.

Note: The error log is not truncated and may become quite a large file. We recommend that you periodically delete this file. The next time an error is encountered a new file will be created.

All errors are also recorded in the Apache error log file (\$ORACLE_HOME/Apache/Apache/logs), so if you do not have a personal page, or are a public user, the errors can still be examined by the portal administrator.

For more verbose error reporting in the Apache error log file, ask your administrator to add the following parameter to the `oradav.conf` file:

```
DAVParam ORATraceLevel 1
```

For more information, see the *Oracle Application Server Portal Configuration Guide*.

2.5.2.8 Authentication

Due to the way some WebDAV clients behave, you might experience authentication requests multiple times. To avoid this, your portal administrator can enable the cookie option by adding the following line to the `oradav.conf` file:

```
DAVParam ORACookieMaxAge <seconds>
```

Refer to the *Oracle Application Server Portal Configuration Guide* for more information.

Some WebDAV clients, for example, Dreamweaver, do not support cookies, so even if the cookie option is enabled, you may still be prompted for your password multiple times. In some clients that do not support cookies you may be able to save your user name and password so you won't need to enter the information each time you are prompted. However, this may cause performance issues with large volume transactions.

2.5.3 Example: Using Web Folders to Add Content to a Page

Web Folders is a Microsoft OS extension that supports the WebDAV protocol. If you access Web Folders on your computer, you can browse the contents of page groups in OracleAS Portal through Windows Explorer and drag and drop files into the pages in those page groups.

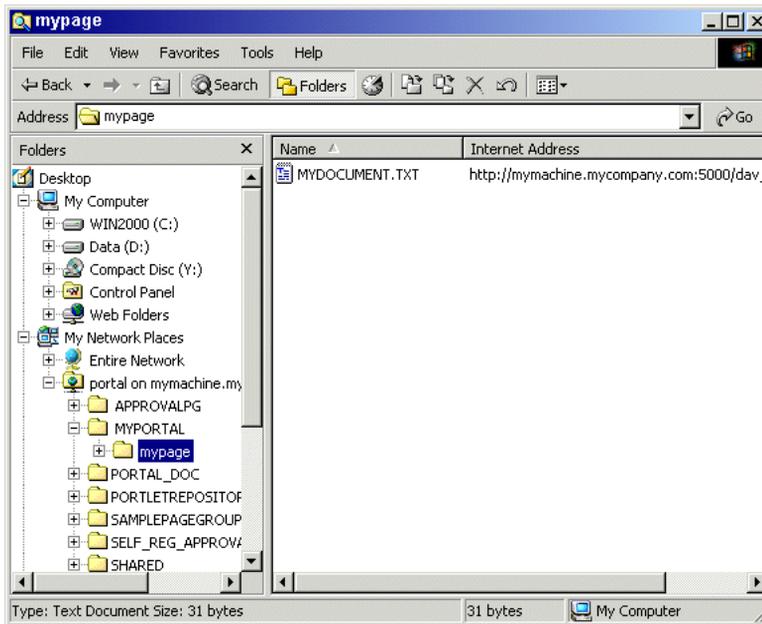
In this example, a user called Scott uses Web Folders to browse the contents of a page group called My Portal and add a file to a page in that page group.

Note: This example shows you how to use Web Folders in Windows 2000 where Web Folders is built into the operating system as part of My Network Places. You should be able to access the Add Network Place Wizard by double-clicking My Computer then double-clicking Add Web Folder. To use Web Folders in Windows 9x/NT, you must install Internet Explorer 5.5 (not 6.0).

If you have Internet Explorer 5.5 installed, but cannot find a Web Folders node under My Computer, you need to explicitly install the Web Folders component of Internet Explorer through Add/Remove Programs in the Control Panel.

In Windows 9x/NT, if you have Internet Explorer 6.0 installed, you will not have Web Folders. You must install Internet Explorer 5.5 and the Web Folders component. After you have done this, you can upgrade to Internet Explorer 6.0 without losing support for Web Folders.

Figure 2–7 An Example of Web Folders in Windows 2000



To use Web Folders to add content to a page (Windows 2000):

1. Open Windows Explorer and click **My Network Places**.
2. Double-click **Add Network Place** to display the Add Network Place Wizard.
3. Enter the WebDAV URL for your portal. For user Scott, the URL is:

`http://mymachine.mycompany.com:5000/dav_portal/portal`

If you are not sure of the WebDAV URL for your portal, contact your portal administrator.

4. Click **Next** then enter the user name and password that you usually use to log in to the portal.

Note: You can log in to Web Folders as one user at any given time. That is, multiple simultaneous logins are not allowed. If you want to log in to Web Folders as a new user, clear your cookies, restart your computer to clear out the current login session, then log in as the new user.

Windows Web Folders sometimes stores your user name and password and/or portal session cookie and uses these details when creating subsequent Web Folders or recreating a Web Folder that has previously existed. Consequently it may not be possible to create multiple Web Folders for portals on the same host using different authentication information. We advise that, unless you understand exactly how your Web Folder implementation behaves, you do not create more than one Web Folder referencing any single host. Also, you should remain vigilant if you attempt to create a Web Folder referencing the same portal as an existing (or previous) Web Folder but with different user log in details - Windows may perform the log in step without prompting you.

5. Click **Finish**.

If you are using Windows 2000, you may be prompted for your user name and password again.

6. The portal is now listed as one of your network places.
7. Double-click the portal entry in My Network Places to drill down into it.

You can now see a folder for each of the page groups that you can access in the portal. The folders actually represent the root pages of the page groups.

8. Double-click the page group to drill down and see a folder for each page in the page group.

In this example, Scott would click **MYPORTAL** to drill down into the My Portal page group. See [Figure 2-7](#).

9. Click a page name to drill down further and view the items in a page.

For example, with the mypage folder you can see a file associated with the file item MYDOCUMENT.TXT. See [Figure 2-7](#).

If the page had sub-pages, these would be listed as sub-folders.

10. As you can access your portal's Web Folder just like any other folder in Windows Explorer, you can drag and drop files from any other folder into your portal.

You can use the drag and drop features to move or copy files within the same page group. Copying files across page groups is not supported. See [Section 2.5.2.3, "Moving, Copying and Editing Content"](#).

For example, Scott can drag a document from his local drive into mypage.

11. When you next access the page in the portal, it includes the new file. You may need to refresh the page to see your changes.

The display name of the new item is the same as the file name (with the extension removed). You can edit the item later to change this.

Note: The item is created as one of the default WebDAV item types (depending on whether the file is a zip file, an image file, or a regular file), and is added to the default item region.

12. If you have a WebDAV enabled desktop application, such as Microsoft Office 2000, you can open files directly from your Web Folders, edit the files and save them.

Providing they do not need approval, any changes that you make are immediately available in the portal. See [Section 2.5.4, "Example: Using Microsoft Office 2000 to Edit the Content of a Page"](#).

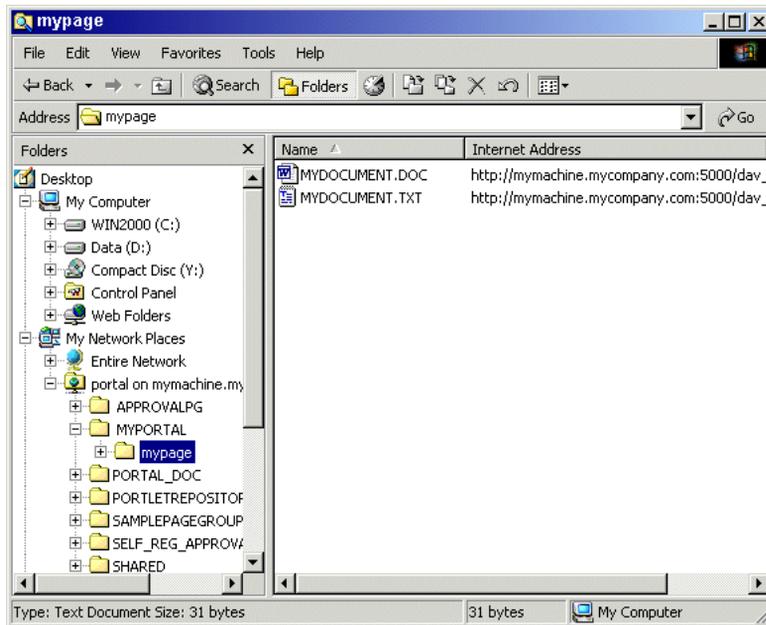
13. Create new pages in the page group by creating new folders in Web Folders.

For example, Scott can right-click inside the mypage folder and choose **New>Folder** from the menu.

2.5.4 Example: Using Microsoft Office 2000 to Edit the Content of a Page

If you are using Microsoft Office 2000, a WebDAV-enabled desktop application, you can start the application, open a file in the portal, edit the content, and save it back to the portal. You don't need to download the document from the portal and then upload it again after you have edited it.

Figure 2–8 Microsoft Office 2000 Example



To use Microsoft Office 2000 to edit the content of a page:

1. Set up Web Folders to access the portal through Windows Explorer and then drill down to the page containing the file item required. See [Section 2.5.3, "Example: Using Web Folders to Add Content to a Page"](#)

For example, Scott drills down to page mypage containing a Word document (MYDOCUMENT.DOC). See [Figure 2–8](#).

2. Double-click on the file item.

3. If prompted, enter the user name and password required to log in to the portal.

The selected file item is opened by the relevant Microsoft Office 2000 application. For example, when Scott double-clicks MYDOCUMENT.DOC it opens in Microsoft Word.

When opening a file, Microsoft Office 2000 locks the file and the related item is also checked out in the portal. If the Office application cannot lock the file (e.g., it is locked by another WebDAV client, or the item was checked-out in the portal) then it is opened as Read-only. If the Office application locked the document when it was opened, it unlocks it when the document is closed.

4. Edit the document and choose **File>Save**.
5. Exit Microsoft Word.

When you next access the same file item in the portal, note that it includes the changes you made.

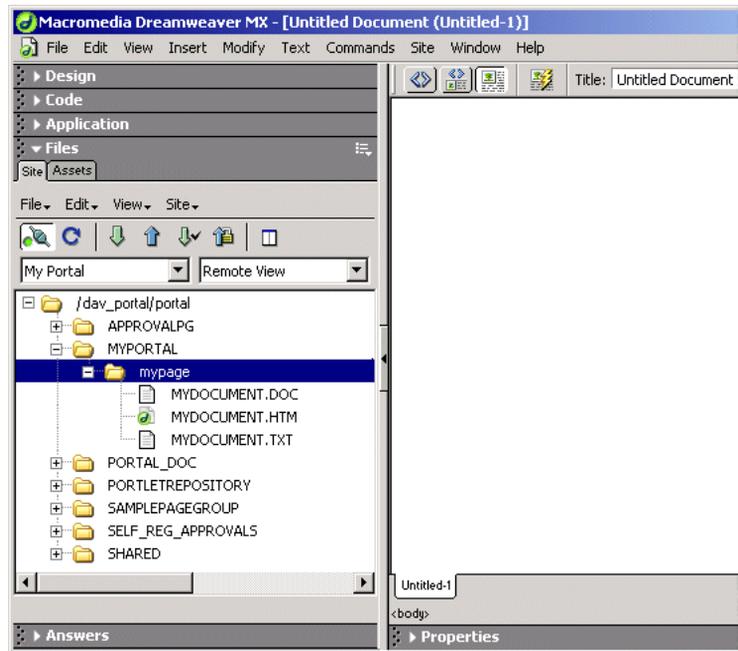
Note: You can also use Office 2000 to create new items in the portal. Simply create the file and then save it directly to the Web Folder for your portal.

The item is created as the default WebDAV item type for regular files, and is added to the default item region. See [Section 7.8.7, "Choosing Default Item Types for Files Uploaded Via WebDAV"](#).

2.5.5 Example: Using Dreamweaver to Edit the Content of a Page

Dreamweaver supports the WebDAV LOCK and UNLOCK methods, so you can use this application to check items in and out of OracleAS Portal while you are working on them.

In this example, a user called Scott uses Dreamweaver to view and edit a document in a page in the My Portal page group. The example uses Dreamweaver MX.

Figure 2–9 Dreamweaver MX Example

To use Dreamweaver MX to edit the content of a page:

1. Open Dreamweaver.
2. Choose **Site>New Site** from the menu to set up a new site for the portal.
3. Click the **Advanced** tab and, from the **Category** list, choose **Local Info**.
4. Enter the **Site Name**. For example, My Portal.
5. Enter the **Local Root Folder** in which to store portal files while working on them. For example, D:\My Work\My Portal.
6. From the **Category** list, choose **Remote Info**.
7. For **Access**, choose **WebDAV**.
8. Click **Settings**.
9. Enter the WebDAV URL for the portal, and the user name and password you usually use to log in to the portal.

If you want to make use of the check in and out functionality, you must also provide your e-mail address.

10. Click **OK** to return to the Site Definition dialog box.
11. Clear the **Check Out Files when Opening** check box to be able to view files without checking them out first.
12. Click **OK** to create the new site.
13. In the Site window, click the **Connect** icon to connect to the portal.
You can now see a folder for each of the page groups in the portal. The folders actually represent the root pages of the page groups.
14. Double-click a page group name to drill down and see a folder for each of the pages.
15. Double-click a page to drill down further and view items.
For example, within the mypage folder Scott can see the files associated with items in the page, e.g., an HTML document (MYDOCUMENT.HTM). See [Figure 2-9](#).
16. Right-click a file and then choose **Check Out**.
A copy of the file is placed in the local folder you identified earlier.
17. In the portal, display the page and note that there is no **Edit** icon next to the item associated with the file. The file cannot be edited because it is locked by a WebDAV client.
18. Click the **Actions** icon and note that actions on the item are not available because it is checked out.
19. In Dreamweaver, double-click the file to open it for editing.
20. Edit the file, then save and close it.
21. Right-click the file and then choose **Check In**.
22. In the portal, refresh the page.

Other users can now view and edit the updated version of this item.

Note: You can also use Dreamweaver's Synchronize feature to keep the files you store on your local file system in sync with the content in the portal.

2.6 Publishing Translated Files

To view and edit files in a particular language, you must either have logged on to OracleAS Portal in the appropriate language, or set the language using the Set Language portlet.

All content that is translated into the selected language is displayed on the page. Any content that has not been translated into the chosen language is displayed in the default language (that is, the language in which the page group was originally created).

When you edit an item you can translate its content into the selected language.

Note: If you are using a WebDAV client to publish files, you will not see any translated versions of your files.

Part II

Building a Portal

Part II contains the following chapters:

- [Chapter 3, "Planning Your Portal"](#)
- [Chapter 4, "Working with Page Groups"](#)
- [Chapter 5, "Working with Content"](#)
- [Chapter 6, "Creating a Look and Feel"](#)
- [Chapter 7, "Creating and Designing Pages"](#)

Planning Your Portal

This chapter gives you some things to think about as you sketch out what you'll need to do to build your portal. The chapter contains these sections:

- [Using Page Groups Effectively](#), introduces the concept of devoting page groups to discrete groups of users.
- [Making Key Decisions](#), describes some key decisions you'll face as you plan your portal.
- [Configuring a Page Group for Content Management](#), discusses some points you'll want to consider if you're setting up a page group focused primarily on managing content.
- [Publishing Content](#), helps you understand the different places from which content can originate and how best to bring them into your portal.

As stated earlier in this book, you as the *page group administrator* can't build a portal by yourself. A great deal of work, mostly focused on establishing the portal infrastructure, must first be completed by the *portal administrator*. (If you're unfamiliar with these terms or what's meant by them, see [Who is Your Audience?](#)). This chapter assumes that all portal administration tasks, discussed in detail in the *Oracle Application Server Portal Configuration Guide*, have already been completed.

3.1 Using Page Groups Effectively

A portal is simply a collection of one or more page groups. This chapter will give you some pointers to help you decide how many page groups you'll need, but keep in mind that each page group usually has a focus that is largely determined by its viewership:

- Page groups devoted to viewers tend to focus on the presentation of the content itself, as opposed to managing that content. Because viewers don't have the

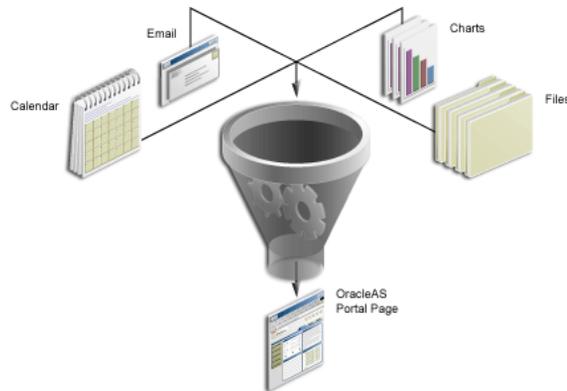
privileges necessary to publish content, they become the consumers of information that is published by others. Where that content is managed--in the same or in a different page group--is completely immaterial to the viewers of the content.

Content typically produced for the consumption of viewers includes:

- Announcements of corporate programs, events, quarterly earning reports, and so on
- Reports that enable users to acquire information and/or make key business decisions
- News, weather, and stock quotes from syndicated content feeds
- Availability of email, calendar, meeting scheduling tools, and other heavily used business applications
- Smaller portals created and maintained by independent departments within the company
- Business documents and other information published by fellow employees

The following illustration depicts the convergence of many disparate information sources to a single page:

Figure 3-1 Information Sources for a Page



The presentation of this information is frequently augmented by typical portal services like personalization (the ability for users to specify their own preferences for color schemes, the content that appears, and the layout and

content of a page), as well as a sophisticated search engine to help users locate critical information quickly.

- Page groups can also be configured to meet the needs of content contributors working in a collaborative manner. In this type of page group, which is tuned for content management, self-service publishing features allow end users to post and share any kind of document or Web content with other users, even those geographically dispersed. For example, consider a development group consisting of engineers, product managers, and quality assurance engineers working at locations scattered all over the world. Each has documents they need to share with members of their own teams as well as the other groups. Nearly every user has the ability to add documents to the page group; certain users have privileges to modify documents produced by other users or groups.

Unlike more generalized page groups, a content management page group relies heavily on OracleAS Portal's assortment of collaboration features:

- Check-in/check-out capabilities, so that users cannot overwrite each others changes
- Version control, so that successive versions of a particular item can be retained or overwritten
- A security mechanism, by which content can be protected from unauthorized view or manipulation
- Workflow, which establishes a process through which a document or request flows among users
- Organizational mechanisms to create a content structure that is easily browsed by the portal user

If you're operating in a small environment, with no company firewall or no plans to make content available outside your firewall, you may find that a content management page group is sufficient for your needs. Or, you may want your content contributors to produce and edit their business documents in such a page group, and use the page portlet (or the autoquery feature of the custom search portlet) to expose those documents to viewers, either within a set of pages just for them or within a different page group entirely.

You'll probably want to read this chapter entirely before deciding how many page groups you'll need and the focus of each. Your ability to make these key decisions wisely will have a far-reaching effect on the final usability of your portal.

3.1.1 Approaching Your Portal

The way in which you go about building your portal is no doubt a reflection of how you as an individual tend to approach any project of large proportions. The learning process for OracleAS Portal seems to fall into three categories:

- Self-learning. Many users new to OracleAS Portal who have nonetheless been given complete responsibility for creating something of value to his or her constituency, prefer to immediately begin experimenting with the product, often implementing a small-scale project just to get the feel for what's involved before launching into the larger task of creating a portal for users. While this may be the most immediately satisfying approach for some, bear in mind that it is also the approach that will probably call for the most patience and the most re-work. There are many decisions that, poorly made, will have far-reaching impact on your portal down the line.
- Attending formal education classes. There are a great many e-classes and instructor led training sessions that can help bring you up to speed on OracleAS Portal quickly. Contact Oracle University for more details, or visit Portal Center at <http://portalcenter.oracle.com>.
- Working with an Oracle consultant. You may want to consider establishing a contract with Oracle Consulting to assess your business needs and develop a portal specifically for you. Once completed, the consultants will then teach you the best way to maintain and extend your portal. The advantages of this approach are that your learning process will be centered on your own portal (as opposed to formal training, which is based on generic scenarios); plus, since the learning curve is not an issue, your portal will no doubt be completed more quickly than if you attempt to build it on your own. The disadvantage, of course, is that the size of your organization and its budget may not make this Oracle Consulting an option.

3.2 Making Key Decisions

This section is intended to give you an idea of the things you'll need to consider as you set up your portal, in the rough order in which you'll need to consider them.

Note: Although it may be quite tempting to simply dive in and start creating pages, you'll find that the more time you invest in planning and making considered decisions in the beginning, the less amount of rework you'll have to do later on. Each decision you make at the page group level can have far reaching effects on the pages residing within.

- Deciding how to structure your portal is perhaps the biggest and most difficult challenge you'll face. Consider the breadth of content you have, as well as each discrete group of users you're trying to satisfy as you decide whether you need multiple page groups or just one:
 - What is the relative size of your user base? Does it make sense to contain your portal in a single page group, with a home page and perhaps one page (or one page with sub-pages) devoted to the needs of each user group? Is your user population small enough so you can develop the entire site in a single page with tabs?
 - It is fairly likely that you will have users who wish to publish business documents and other information to the page group (that is, content contributors), as well as users who will merely consume that information (in other words, viewers). How should those two groups interact? Do you want content contributors to create, edit, and publish the content on the same page where it is viewed? Or do you want to have a separate area in which content contributors can work, then use page portlets and custom searches to present relevant information to viewers? To help make this decision, consider whether the *creators* of the information are vastly different from the *consumers* of the information.

Suppose you have a group of engineers that will be producing a great deal of content. You want them to be able to create their page structure naturally, without having to yield to a formal set of guidelines and standards. Because the consumers of much of this information are not engineers, however, the potentially unwieldy page structure that might result could well be distracting or confusing to its non-technical audience. In this case, it's best if the developers be allowed to publish as they wish, and for you to superimpose a structure that is natural and pleasing to the consumers using custom searches and page portlets. If the consumers and the creators are one and the same, however, there's no reason that content creation and consumption can't occur on the same page(s).

See [Configuring a Page Group for Content Management](#) for more information on how to create a page group devoted to content management.

- Will different groups expect their search results to be confined to their own areas? By default, the search feature combs all pages belonging to the page group to which the current page belongs.¹ If you think your Human Resources group will want their search to be limited to just the data that is relevant to them, consider creating separate page groups for each group within your enterprise.

If you do decide to create multiple page groups, you'll probably want to develop some common objects and place them in the Shared Objects page group so that you can achieve some consistency across work performed by the different groups. Only objects (navigation pages, templates, styles, and so on) in the Shared Objects page group can be used across multiple page groups.

- Do you want each of the pages within your portal to look similar? One way to accomplish this is through the use of *templates*. You can build a template that has a common navigation bar, footer, and banner, then leave it up to individual content contributors to populate the remainder of the page with content. You might also want to create one template for each user group to clearly identify the page as belonging to that group.

Note: Although you cannot force your page designers/builders to use your template, you can make it the default so that it is the first template listed in the drop-down list in the Page Creation wizard.

- Establish page group wide properties, such as the amount of space to allocate to uploaded files, the default style, navigation page, and page template, and what type of items contributors can add to pages in the page group. You can identify such things as:
 - What level of access will each user or user group have on the pages created within this page group?
 - What template will be selected by default when a new page is created?
 - What navigation page will be selected by default for use as a banner when a new page is created?
 - What style will be applied by default when a new page is created?

¹ Although it is possible to use the custom search feature to search multiple page groups, less sophisticated users may not be comfortable doing that.

- Will users of this page group be allowed to apply user interface templates to their pages? User interface templates govern what is displayed around the page, whereas page templates govern the appearance and content of the page itself.

Page group-wide settings are made through the Navigator. On the Page Groups tab, click Properties next to your page group.

- Create, or have your graphics designer create, a style for your portal to determine the colors and fonts used by the pages in the page group. Later on, you can indicate whether page designers can change this style as they develop their pages and/or whether users who are viewing the pages can apply their own style preferences to the page.
- Create your home page.
 - Decide how many regions you will need.
 - Create, or have your graphics designer create, a navigation bar and banner. You may also want to consider using a footer for links to related sites and Web pages.
 - Add portlets and items to your page.
 - Establish security for the page.

Repeat this process for each page you want to create.

Remember, as page group administrator, you are in charge of not only making decisions that affect the page group as a whole, but also for developing the procedure by which the content on your portal is developed and maintained. You'll probably want to delegate a good deal of the authority for page creation to others so you don't become a bottleneck.

3.3 Configuring a Page Group for Content Management

Building a content management page group involves many of the same considerations as any other type of page group. There are some additional things you need to consider that are unique to an environment in which users are creating content. These things include:

- Will a single page group meet your content management needs? Or will you need more than one? Consider the following:
 - How many groups of content contributors do you have? How different are their needs?

- Are the content attribution needs different for each group of content contributors? Your Travel department might require categories such as Hotels, Air Fares, and Rental Cars, while your Financial group needs categories like Statements, Forecasts, and Data Sheets. Then again, you may deliberately want to develop a taxonomy that is general enough to satisfy all users, regardless of departmental role.
- What is the amount of information produced by each group? Does the amount suggest that each group or department may require its own page group?
- Do you need to implement different controls for different groups within your organization? If so, you'll want to set up multiple page groups to address these needs. For example, one group may need to keep multiple versions of their files intact, while others don't require this capability. Or you may want to limit the file size for one particular group. To get an idea of the kinds of settings you can control at the page group level, click Properties in the Navigator next to your default page group and take a look at the fields on each tab.

If you do decide to create multiple page groups to support content management, you'll probably want to develop some common objects and place them in the Shared Objects page group so that you can achieve some consistency across work performed by the different groups. Only objects (navigation pages, templates, styles, and so on) in the Shared Objects page group can be used across multiple page groups.

- Within a page group, can you keep the editing experience fairly simple? Doing so may make it easier for content contributors to add content to your portal. For example, consider creating a template consisting of a very simple layout: a banner, a navigation area along the left side, a footer, and a content region in the center. For all regions except the main content region, you can de-select the check box Enable Users To Include Content In This Region (one of the region properties). When content contributors access this page, they will see edit controls only in the main content region, thus providing a more streamlined, simplified editing experience.
- Examine the item types provided by OracleAS Portal. Are they sufficient for your needs? Will you require additional attributes, or would you like to remove some attributes defined by default? For example, files may have authors, create dates, or keywords associated with them. You may want to include additional attributes, so that you can use the Custom Search portlet to build pre-configured searches based on a given attribute. With the Custom Search portlet, you can collect data together irrespective of category,

perspective, item type, and so on. For example, you might want to regularly publish all reports belonging to the category For Review on a weekly basis. To do that, you can use the Publish attribute to specify dates greater than the previous week's publish date. If you construct your attributes wisely, you'll have a great deal of flexibility when creating custom searches.

- How much control do you want to give your page designers and content contributors? Should your page designers be allowed to create sub-pages?
- Establish page group wide properties, including:
 - What level of versioning do you want to enable for all pages in the page group?
 - How do you want to handle the deletion of items? Should the items be "soft-deleted" so that a page manager can "undelete" them later?
 - What template will be selected by default when a new page is created?
 - How long should the New and Updated icons appear beside new and updated items?
 - What navigation page will be selected by default for use as a banner when a new page is created?
 - What style will be applied by default when a new page is created?
 - What item types will be available to users creating new pages?
- Will your users want to use Web Folders to add content to their pages? Web Folders is a Microsoft OS extension that supports the WebDAV protocol. After configuring Web Folders on a user's computer, the user can browse the contents of any page group through Windows Explorer and drag and drop files into any page to which they have access.
- Do you need to establish any approval or other types of workflow chains so that documents or requests can move from one user to another?

3.4 Publishing Content

Although your work as page group administrator may not require you to actually create the content displayed in your portal, you no doubt will have a role in determining what kind of content is required and possibly assisting others in producing that content. You will most likely need to work closely with *developers* at your site, who have the responsibility for building components and/or portlets for

others to include on their pages. Some of the things that need to be considered in the arena of content creation are:

- Are there any reports, charts, forms, or other components you'd like to display? Assuming that the data required is already in the OracleAS Portal or another enterprise database, you can create these components yourself without the assistance of a developer.² Simply go to the Navigator, click the Providers tab, then click Create New... Portal DB Provider at the top. Then click the name of the application in the Navigator's Name column to display a list of the components you can create. If you require assistance, use the online help.
- You may need to sift through hundreds or thousands of Web sites to find appropriate content. Make your job easier using Web Clipping portlet. Web Clipping portlet offers an easy, intuitive way to capture content and functionality from existing Web sites and present them as portlets. Create Web clippings on the fly by navigating to the source Web page and selecting the portion of the page to clip.
- Publish Web Service, XML, or CSV (comma separated value, also known as spreadsheet) data easily using OmniPortlet. OmniPortlet essentially separates the content publishing from the content layout. Whereas changing a portlet's layout often involves regathering the data, with OmniPortlet you can experiment with layouts at will, without ever having to regenerate the data itself. See the online help for more information.
- Browse through the Portlet Repository and see if any of the portlets provided by OracleAS Portal will be useful to you. You may also want to check, or have someone else check, the Knowledge Exchange to see if you can incorporate any of the work done by other OracleAS Portal developers. In addition, be sure to peruse the Portal Catalog, an impressive collection of portlets and services offered by our OracleAS Portal Partners. You can see the full list of partners and get a brief description of their offerings at <http://portalcatalog.oracle.com>.
- To publish static information, such as corporate announcements or press releases, use *text items*. For Internet Explorer users, text items can be authored with an integrated Rich Text Editor which, when enabled,³ provides a WYSIWYG interface for creating formatted HTML. For Netscape users, or when the Rich Text Editor has been disabled, text can still be entered through

² If you are relying on data in another enterprise database, make sure your portal administrator has established the proper database links from the OracleAS Portal database to that data source before you begin your work.

³ Make sure that the Rich Text Editor has been enabled by selecting Properties next to your page group in the Navigator, then clicking the Item tab. The Rich Text Editor option is at the bottom.

the browser into a standard HTML text area. The text item can contain plain text (to which formatting is applied from the page or region style sheet) or text with embedded HTML formatting tags. You can also create your text items by cutting and pasting existing HTML text into the text item.

- Much of your content will probably come from documents produced by fellow employees. If their work has been loaded into OracleAS Portal and the correct attributes have been supplied, you'll find that the Custom Search portlet is an excellent means for gathering documents together based on a common set of criteria and displaying them in a portlet. In a nutshell, the Custom Search portlet allows you to define a complex set of portal search criteria that executes a search each time the page is rendered. You may want to display all documents created by the Human Resources department in one portlet, for example, and create another portlet with all the internal forms employees may need to reference, irrespective of which department created them. To use the Custom Search portlet, add it to your page from the Portlet Repository, then use the Edit Defaults action to establish your search criteria.
- Do you want to display syndicated content? Syndicated content comes from an external source, such as a WebDAV server or a file system. Your portal administrator decides which content to subscribe to, and specifies which pages within the portal should receive the syndicated content. The portal administrator can also set things up so that information on your page is shared with others through the subscription services offered by the Oracle Syndication Server. (For a page to receive or send syndicated content, the PORTAL_SYNDICATION user must have the Manage or Manage Items With Approval privilege on the page.) See the *Oracle Application Server Portal Configuration Guide* for information on how to subscribe to syndicated content.
- What kinds of applications are required? Do you have third-party or in-house applications you want to make accessible to your user base? If so, your developers can choose among several paths, ranging from the simple to the more complex:
 - Include the application in the External Applications portlet, then add the portlet to a commonly accessed page.
 - Assuming that the application is Web-enabled, use a Web Clipping, iFrame, or URL portlet to display the application's home page.
 - Use the Portal Developer Kit (PDK) to transform the application into a portlet provider. By doing so, discrete areas of the application can then become portlets that can be manipulated individually.

Working with Page Groups

This chapter shows you how to create and set up a page group. It includes the following main sections:

- [Creating a Page Group](#)
- [Deleting a Page Group](#)
- [Delegating Page Group Responsibilities](#)
- [Setting Defaults for the Pages in a Page Group](#)
- [Sharing Objects Between Page Groups](#)
- [Creating a Translatable Page Group](#)

Intended Audience

The contents of this chapter are intended for users with at least the Manage All privilege on a page group (that is, page group administrators). If a particular task requires different privileges, the required privileges will be listed before the steps of that task.

4.1 Creating a Page Group

A *page group* is a collection of related pages. Every page belongs to a page group. A page group also contains any supporting objects required for the pages within it, for example, styles, page templates, categories, and custom types.

Privileges: Page group administrators cannot create page groups unless they also have the Create privilege on All Page Groups. Portal administrators automatically have these privileges and can create page groups.

To create a page group:

1. In the Page Groups portlet, click the **Create Page Group** link.

By default, the Page Groups portlet is located on the Build tab of the Portal Builder page.

2. In the **Name** field, enter a name for the page group. The name can be used in a URL to directly access the page group. Direct access URLs take the following format:

```
http://<hostname>:<portnumber>/pls/<dad>/url/page/<pagegroupname>
```

For example:

```
http://mymachine.mycompany.com:5000/pls/portal/url/page/mypagegroup
```

The name is limited to 60 characters and can contain only alphanumeric characters (A-Z, a-z, 0-9) and the underscore character (_). Do not use spaces or other special characters.

3. In the **Display Name** field, enter a descriptive name for the page group.

The display name is limited to 256 characters.

4. From the **Default Language** list, choose the language in which to create the page group.

You can make the page group available in other languages later by creating translations. See [Section 4.6, "Creating a Translatable Page Group"](#).

5. Click **Create**.

When you create a page group, you are automatically assigned as its administrator (that is, you are granted the Manage All privilege on the page group). You can assign a different page group administrator if desired. See [Section 4.3, "Delegating Page Group Responsibilities"](#).

4.2 Deleting a Page Group

Deleting a page group deletes all the objects within the page group, all the content within the page group, and any of its translations.

To delete a page group:

1. Click the **Navigator** link, then click the **Page Groups** tab.

A Navigator link can appear on any page. By default, you can find one on the Portal Builder page.

2. Click the **Page Groups** path link to go to the top level of the Page Groups Navigator.
3. Click the **Delete** link in the row for the page group that you want to delete.
4. In the confirmation page, click **Yes**.

4.3 Delegating Page Group Responsibilities

This section contains the following subsections:

- [Assigning Page Group Privileges](#)
- [Controlling Who Can Apply a Different Style to a Page](#)
- [Specifying a Page Group Contact](#)

4.3.1 Assigning Page Group Privileges

You can determine who has access to a page group and to what extent. Keep in mind, however, that page group access works in tandem with the global privileges that are set for users and groups. For example, you may explicitly grant the View privilege on a particular page group to three users. But there may be many more users who can actually view the contents of the page group, depending on how many users have been granted the View global privilege on All Page Groups. For more information about global privileges, refer to the *Oracle Application Server Portal Configuration Guide*.

For information about controlling access to the individual pages in a page group, see [Section 7.12, "Protecting Your Content"](#).

Granting Access to a Page Group

To grant a user or group access to a page group:

1. From the Page Group portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default the Page Group portlet is located on the Build tab of the Portal Builder page.

2. Click the **Access** tab.
3. In the **Grantee** field, enter the name of the user or group that you want to allow to access the page group.

If you are not sure of the name of the user or group, click the Browse Users or Browse Groups icon and select from the list provided.

4. In the list of privileges, choose the level of access to grant to the user or group (see [Table 4-1](#)).

Table 4-1 Page Group Privileges

A User or Group with the Following Privilege:	Can:
Manage All	Perform any task within the page group. The Manage All privilege includes all other page group privileges: Manage Classifications, Manage Templates, Manage Styles, and View. A user with this privilege is called the <i>page group administrator</i> .
Manage Classifications	Create, edit, and delete any category, perspective, attribute, custom item type, and custom page type in the page group. A user with this privilege cannot view the pages in this page group unless he or she also has the View privilege.
Manage Templates	Create, edit, and delete any page template in the page group. A user with this privilege cannot view the pages in this page group unless he or she also has the View privilege.
Manage Styles	Create, edit, and delete any style in the page group, and apply a different style to any page in the page group. A user with this privilege can also view any page in the page group.
View	View the content of any page in the page group, and preview any externally published portlet in the page group. A user with this privilege cannot add, remove, show, or hide any content within the pages in the page group.

5. Click **Add**.
6. Click **OK**.

Changing Access to a Page Group

To change a user or group's access to a page group:

1. From the Page Group portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default the Page Group portlet is located on the Build tab of the Portal Builder page.

2. Click the **Access** tab.
3. In the Change Access section, find the user or group whose privileges you want to change.

Because OID can include multiple containers that can use the same group names, the distinguished name (DN) is displayed next to any group that does not belong to the local OracleAS Portal instance.

4. From the **Privilege** list, choose the new privilege level (see [Table 4-1](#)).

Note: To completely remove a user or group's privileges on the page group, click the Delete icon.

5. Because of caching, if you change a user or group's page group privileges, your changes may not be immediately apparent if the user or a member of the group has already accessed the page group. For example, the user may be able to see icons or links for actions that he or she is no longer authorized to perform. This may cause confusion if the user clicks one of those icons or links and receives an error message.

To make sure that your changes take effect immediately, clear any cache entries for the page group by clicking the **Clear Cache** link.

6. Click **OK**.

4.3.2 Controlling Who Can Apply a Different Style to a Page

OracleAS Portal provides two page group settings that allow you to ensure that users cannot apply different styles to the pages in your page group:

- The **Allow Privileged Users To Manage Page Style** setting is turned on by default, meaning that users with **Manage** or **Manage Style** privileges on a page in the page group can apply a different style when editing the page. If you turn this setting off, only portal administrators and users with the **Manage All** privilege on the page group can apply a different style to the pages in the page group. For information about applying styles to pages, see [Section 7.4.1, "Applying a Style to a Page"](#).
- The **Allow Privileged Users To Customize Page Style** setting is turned on by default, meaning that users with the **Customization (Style)** privilege or above on a page in the page group can apply a different style when customizing the page. If you turn this setting off, nobody (not even users with the **Manage** privilege on the page or the **Manage All** privilege on the page group) can apply a different style when customizing a page in the page group. For information about customizing a page to apply a different style, see [Section 1.3.8, "Applying a New Style to a Page"](#).

To control who can apply a different style to a page:

1. From the Page Group portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default the Page Group portlet is located on the Build tab of the Portal Builder page.

2. Clear the **Allow Privileged Users To Manage Page Style** to prevent all users except portal administrators and users with the **Manage All** privilege on the page group from applying a different style when editing pages in the page group.
3. Clear **Allow Privileged Users To Customize Page Style** to prevent all users from applying a different style when customizing pages in the page group.
4. Click **OK**.

4.3.3 Specifying a Page Group Contact

The page group contact is the person for users to contact with questions about the page group, and is typically the page group administrator. You can provide an e-mail address for the page group contact, and display that address on the pages in the page group.

Specifying the Page Group Contact E-mail Address

To specify the page group contact e-mail address:

1. From the Page Group portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default the Page Group portlet is located on the Build tab of the Portal Builder page.

2. In the **Contact E-mail** field, enter the e-mail address of the page group contact, for example:

webmaster@mycompany.com

scott@mycompany.com

3. Click **OK**.

Adding the Page Group Contact E-mail Address to a Page

Privileges: Any user with at least the Manage Items With Approval or Manage Content privilege on the page can add the page group contact e-mail address to a page.

To add the page group contact e-mail address to a page:

1. In the Page Groups portlet, under Edit a Page, click the Browse Pages icon next to the Name field.
2. Select the page to which you want to add the page group contact e-mail address, then click Edit.

You can also add the contact e-mail address to page templates or navigation pages.

3. In the region where you want to add the e-mail address, click the Add Item icon.

If you do not see the Add Item icon, the region may be a portlet region, in which case, you cannot add items to this region.

4. From the **Built-In Navigation Item Types** list, choose **Portal Smart Link**.

If you do not see **Portal Smart Link** in the list, the item type has not been included in the page group. See [Section 5.2.3.3, "Making an Item Type Available to a Page Group"](#).

5. Click **Next**.
6. From the **Portal Smart Link** list, choose **Contact**.

For information about the other smart links, refer to [Section 6.3.4.6, "Adding a Portal Smart Link Item"](#).

7. Enter your own **Display Name** or **Use The Default Display Name**.

If you provide your own display name, it will not be translated. The exact text that you enter in the Display Name field will be used for all languages. The default display name is translated.

8. Alternatively, you can specify an **Image** to display instead and specify the **Image Alignment**.

9. Click **Finish**.

Note: If you add the Contact smart link to a page that has a designated page contact, the page contact e-mail address is used for the smart link instead of the page group contact e-mail address. For information about how to specify a page contact, refer to [Section 7.8.6, "Specifying a Page Contact"](#).

4.4 Setting Defaults for the Pages in a Page Group

This section includes the following sub-sections:

- [Inheriting Parent Page Properties when Creating Pages](#)
- [Choosing a Default Style for a Page Group](#)
- [Choosing a Default Navigation Page for a Page Group](#)
- [Choosing a Default Page Template for a Page Group](#)
- [Enabling Parameters and Events](#)
- [Enabling JavaServer Page Access](#)

For other page group configuration tasks, see:

- [Section 5.6, "Configuring Page Group Item Management Settings"](#)
- [Section 5.5, "Setting Up Approvals"](#)

4.4.1 Inheriting Parent Page Properties when Creating Pages

If many of the pages within your page group are likely to need the same settings (for example, use the same template and access control settings), you can specify that new pages inherit properties from their parent page. If you set up the parent

page properties correctly, this will reduce the amount of time page managers need to spend setting up page properties.

If you enable this option, new pages inherit the following properties from their parent page:

- Page type
- Navigation page used for the banner (this is defaulted to the first created navigation page portlet on the parent page). If the parent page is based on a template, the sub-pages will use the same template, but if the parent page also contains other navigation portlets, those navigation portlets will also be added to the sub-pages
- Page caching option
- Page template
- Style
- Access settings, including Display Page To Public Users, Enable Item Level Security, and the access control list.
- UI Template
- Portlet settings
- WebDAV default item types
- Item versioning level
- Contact e-mail
- Category
- Keywords
- Approval process
- Parameters

For information about creating pages, see [Section 7.1, "Creating Pages"](#).

To inherit parent page properties when creating pages:

1. From the Page Groups portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default, the Page Groups portlet is located on the Build tab of the Portal Builder page.
2. Select **Copy Parent Page Properties When Creating Page**.

3. Click **OK**.

4.4.2 Choosing a Default Style for a Page Group

When creating a page, page creators can choose a style to define the colors and fonts to be used in the page. To simplify this choice, and to identify a preferred style for the pages in your page group, you can identify a default style. This style becomes the default selection when a page creator creates a new page. If the page creator does not explicitly choose a style, the default style is used. You can also choose **<None>** as the default style.

When a style is deleted, all pages and item regions that used it revert to the page group default style. If the page group default style is **<None>**, all pages and regions revert to the system default style.

For information about creating styles, see [Section 6.2, "Working with Styles"](#).

To choose a default style for a page group:

1. From the Page Groups portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default, the Page Groups portlet is located on the Build tab of the Portal Builder page.

2. Click the **Configure** tab.
3. In the Page Types and Template section, click the **Edit** link.
4. From the **Default Style** list, choose a default style for the page group.

This list includes all the public styles in this page group and the Shared Objects page group.

5. Click **OK** to return to the Configure tab.
6. Click **Close**.

The default style is ignored if the option to inherit page properties for new pages from the parent page is enabled for the page group. See [Section 4.4.1, "Inheriting Parent Page Properties when Creating Pages"](#).

4.4.3 Choosing a Default Navigation Page for a Page Group

When creating a page, page creators can choose a navigation page to display as a banner in a region at the top of the page. To simplify this choice, and to identify a preferred navigation page for the pages in your page group, you can identify a

default navigation page. This navigation page becomes the default selection when a page creator creates a new page. If the page creator does not explicitly choose a navigation page, the default navigation page is used. You can also choose <None> as the default navigation page.

Because the default navigation page is added to a region that occupies the full width of the page, make sure that the navigation page you choose here is suited to such a region.

For information about creating navigation pages, see [Section 6.3, "Working with Navigation Pages"](#).

To choose a default navigation page for a page group:

1. From the Page Groups portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default, the Page Groups portlet is located on the Build tab of the Portal Builder page.

2. Click the **Configure** tab.
3. In the Page Types and Template section, click the **Edit** link.
4. From the **Default Navigation Page** list, select a default navigation page for the page group.

This list includes all the navigation pages in this page group and the Shared Objects page group that have been exposed as portlets and are available for use

5. Click **OK** to return to the Configure tab.
6. Click **Close** to return to the Navigator.

The default navigation page is ignored if the option to inherit page properties for new pages from the parent page is enabled for the page group. See [Section 4.4.1, "Inheriting Parent Page Properties when Creating Pages"](#).

4.4.4 Choosing a Default Page Template for a Page Group

When creating a page, page creators can choose a page template to make the page conform to a standard appearance. To simplify this choice, and to identify a preferred page template for the pages in your page group, you can identify a default page template for a page group. This template becomes the default selection when a page creator creates a new page. If the page creator does not explicitly choose a page template, the default page template is used. You can also choose <None> as the default page template.

For information about creating page templates, see [Section 6.1, "Working with Page Templates"](#).

To choose a default template for a page group:

1. From the Page Groups portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default, the Page Groups portlet is located on the Build tab of the Portal Builder page.

2. Click the **Configure** tab.
3. In the Page Types and Template section, click the **Edit** link.

4. From the **Default Page Template** list, choose a default template for the page group.

This list includes all the page templates associated with this page group and the Shared Objects page group.

5. Click **OK** to return to the Configure tab.
6. Click **Close**.

The default page template is ignored if the option to inherit page properties for new pages from the parent page is enabled for the page group. See [Section 4.4.1, "Inheriting Parent Page Properties when Creating Pages"](#).

4.4.5 Enabling Parameters and Events

You can enable page designers to use parameters and events to enhance the behavior of pages.

For more information about parameters and events, see [Section 7.11, "Using Parameters and Events"](#).

To enable parameters and events in a page group:

1. From the Page Groups portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default, the Page Groups portlet is located on the Build tab of the Portal Builder page.

2. Click the **Configure** tab.
3. In the Parameters and Events section, click the **Edit** link.
4. Select **Enable Parameters and Events**.

5. Click **OK** to return to the Configure tab.
6. Click **Close**.

4.4.6 Enabling JavaServer Page Access

OracleAS Portal gives you the ability to create various kinds of Web pages. You can supplement this ability with JavaServer Pages (JSPs).

You can create two types of JSPs for use with OracleAS Portal:

- **Internal JSPs** are created within OracleAS Portal. Internal JSPs are quick and easy to set up and manage. You create them using the standard page wizards. Internal JSPs are then automatically stored in the OracleAS Portal system, and are managed and secured by OracleAS Portal. For more information, see [Section 7.1.5, "Creating a JavaServer Page \(JSP\)"](#).
- **External JSPs** are created outside OracleAS Portal using a text editor or other external tool. You store external JSPs outside of OracleAS Portal. OracleAS Portal does not provide any file management or security. There are additional requirements for having OracleAS Portal accept and display external JSPs in a page group. You must create a configuration file and install it in the OracleAS Portal environment, and modify the server to allow the external JSPs to log in to OracleAS Portal.

You can choose the type of JSP suited to your situation. In general, internal JSPs are much simpler to create and use. External JSPs offer more flexibility, are easier to modify, and usually run faster than internal JSPs.

Whether you are using external or internal JSPs, you need to have a page group with which the JSPs will be associated. Also, that page group needs to have several JSP-related properties.

To enable JavaServer Page access:

1. From the Page Groups portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default, the Page Groups portlet is located on the Build tab of the Portal Builder page.

2. Click the **Configure** tab.
3. In the JSP Access section, click the **Edit** link.
4. Select the **Allow External Access** check box.

This is required even for internal JSPs.

5. In the **Access Key** field, enter a text string to provide security between the page group and JSPs. In order for your external JSPs to access the page group, you will need to specify this key in the configuration file you create to support your external JSPs.

Even if the page group will be used only by internal JSPs, you still need to create an access key for the page group.

The access key can contain up to 200 alphanumeric characters. Do not use spaces, the underscore character (`_`), or other special characters.

6. Click **OK** to return to the Configure tab.
7. Click **Close**.

4.5 Sharing Objects Between Page Groups

You can share attributes, item types, page types, categories, perspectives, templates, navigation pages, and styles between page groups by creating them in the Shared Objects page group.

Shared objects enable better integration between page groups while permitting customization at the page group level. Thus, any time you want to share an object across multiple page groups, you should create it in the Shared Objects page group.

To create or manage objects in the Shared Objects page group, you must have the appropriate page group privileges on the Shared Objects page group. For example, to create or edit a shared category, you must have the Manage Classifications privilege on the Shared Objects page group.

If you create an attribute, item type, page type, category, or perspective in one page group, and later realize that it would be useful in other page groups as well, you can promote the object to the Shared Objects page group, instead of having to recreate it.

Note: You cannot promote templates and navigation pages to the Shared Objects page group. If you want to share a template or navigation page between page groups, you must recreate it in the Shared Objects page group.

The Shared Objects page group also contains users' personal pages.

Promoting an Object to the Shared Objects Page Group

Privileges: To promote an attribute, page type, item type, category, or perspective you must have the Manage Classifications privilege on the page group to which the object belongs and on the Shared Objects page group. To promote a style you must have the Manage Style privilege on the page group to which the style belongs and on the Shared Objects page group.

To promote an object to the Shared Objects page group:

1. Use the Navigator to browse to the object that you want to share.
2. In the row for the object, click the **Promote** link.
3. On the confirmation page, click **Yes**.

Note: If you promote a non-public style (that is, a style for which the Make Public check box is not selected), the style is moved to the Shared Object page group, but is not made public. If you want other users to be able to use the style, you must explicitly make it public.

Example 4–1 Promoting a Category to the Shared Objects Page Group

1. Click the Navigator link, then click the **Page Groups** tab.
A Navigator link can appear on any page. By default you can find one on the Portal Builder page.
2. In the path, click the **Page Groups** link to navigate to the top level of the Page Groups Navigator.
3. Click the link for the page group to which the category currently belongs.
4. Click the **Categories** link.
5. In the row for the category that you want to promote, click the **Promote** link.
6. In the confirmation screen, click **Yes**.

When you are returned to the Navigator, notice that the category is no longer listed under this page group.

7. In the path, click the **Page Groups** link to navigate to the top level of the Page Groups Navigator.
8. Click the **Shared Objects** link.
9. Click the **Categories** link.

Notice that the category you just promoted is now listed under the Shared Objects page group.

4.6 Creating a Translatable Page Group

When creating a page group, the creator chooses the language in which to create it. However, if the page group is used by a multilingual audience, it may need to be available in different languages.

You can make a page group available in a different language by creating a translation of the page group. Once you have created a translation in a particular language, content contributors can add content in that language.

Note: Before you can create a translation for a particular language, the application messages for that language must be installed. For information about this, refer to the *Oracle Application Server Portal Configuration Guide*.

When you create a translation, you are simply making it possible for the content of the page group to be translated; the content of the page group is not translated for you. Once a translation is created for a page group, a translator must log on to the page group, set the language accordingly, and edit and translate the content in the page group.

The following list shows which information translators may want to translate:

- Category display names and images
- Perspective display names and images
- Page display names, descriptions, and images
- Page parameter display names and descriptions
- Item display names, descriptions, keywords, URLs, files, text, and images
- Attribute display names
- Custom item and page type display names, descriptions, and images

- **Style names**

To view a page group in a particular language, users simply have to set the portal language to the appropriate language, either when logging on, or in the Set Language portlet. Numeric and date information is displayed in the appropriate format, and lists are sorted in the appropriate order for the chosen language. If a user chooses a language for which a translation has not yet been created, the page group is displayed in the default language (that is, the language in which the page group was originally created).

Additional Notes

- When editing the information in a page group, any changes that are language-specific (that is, changes to any of the translatable information listed above) are applied only to the translation associated with the user's portal language setting. Any changes that are not language-specific, for example, object names that are only used internally, are applied to all translations, including the default.
- When adding new information to a page group, the information is added to the translation associated with the user's current portal language setting. If the language is not the page group's default language, the information is also added for the default language. When users view the page group in the default language, they will see the new information in the language in which it was added, until it is translated into the default language.
- Deleting an object from the page group deletes all translations of the object and deletes all documents related to the object. For example, say you have a page group with a default language of English and a French translation. If you delete the French translation of a category, the English category is also deleted, as are all the items assigned to the category, regardless of language.

This section contains the following sub-sections:

- [Creating a Translation](#)
- [Changing the Status of a Translation](#)
- [Deleting a Translation](#)

4.6.1 Creating a Translation

When a page group is created, it is available in a single default language (specified at creation time). You can subsequently create translations of the page group to make it available in other languages. Creating a translation means that content

contributors can seamlessly add content to a page group in a particular language, and if users choose to view the portal in that language, they will see the appropriate content. Creating a translation does not translate the content of the page group.

To create a translation:

1. From the Page Group portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default the Page Group portlet is located on the Build tab of the Portal Builder page.

2. Click the **Translations** tab.
3. From the **Language** list, choose the language for which you want to create the translation.

This list includes only those language for which the application messages have been installed and made available for user data translation, and for which a translation does not already exist.

4. Click **Create**.
5. Click **OK**.

4.6.2 Changing the Status of a Translation

When you first create a translation, the translation is available only to users with the Manage All privilege on the page group. You can edit a translation to make it available to all users.

To change the status of a translation:

1. From the Page Group portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default the Page Group portlet is located on the Build tab of the Portal Builder page.

2. Click the **Translations** tab.
3. Select **Online** to make the translation available to all users. If you do not select **Online**, the translation is available only to users with the Manage All privilege on the page group.

For example, while the content is being translated, you might not want the translation to be available to all users. However, as soon as the translation of the content is complete, you will want all users to be able to see it.

Note: If the translation is not online, you must give translators the Manage All privilege on the page group so that they can translate its content.

4. Click **OK**.

4.6.3 Deleting a Translation

Deleting a translation deletes all the content in the page group for the translation language.

You cannot delete the page group's default language (that is, the language specified when the page group was created) unless you delete the entire page group (including all its translations).

To delete a translation:

1. From the Page Group portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.
By default the Page Group portlet is located on the Build tab of the Portal Builder page.
2. Click the **Translations** tab.
3. Click the **Delete** icon next to the translation that you want to delete.
4. Click **OK**.

Working with Content

This chapter shows you all the different things you can do to the content in your page group to make it easier for your users to find and work with. It contains the following main sections:

- [What Can You Do with Content?](#)
- [Working with Attributes, Page Types, and Item Types](#)
- [Working with Categories](#)
- [Working with Perspectives](#)
- [Setting Up Approvals](#)
- [Configuring Page Group Item Management Settings](#)

Intended Audience

The contents of this chapter are intended for users with at least the Manage All privilege on a page group (that is, page group administrators). If a particular task requires different privileges, the required privileges will be listed before the steps of that task.

5.1 What Can You Do with Content?

Portals are all about bringing together the information that users need to do their jobs more effectively. Since managing business documents and other content is an important part of most jobs, and since the portal is the focal point for user collaboration and the logical location to publish and access business content, it only makes sense that content management features should be part of the OracleAS Portal framework.

- OracleAS Portal includes several attributes, page types, and item types that are intended as a starting point for describing the content in your portal. If you find that you wish to store more information about the pages and items in your portal, you can create your own attributes and add them to page and item types. You can also create your own page and item types. See [Section 5.2, "Working with Attributes, Page Types, and Item Types"](#).
- Because of its self-service features, a portal has the potential to contain a great deal of content. To make it easier for your users to find the information stored in the portal, OracleAS Portal provides the ability to classify content using categories and perspectives. Users can then search for content of a particular category (for example, Sales Report), or that is written from a particular perspective (for example, Sales Representative). See [Section 5.3, "Working with Categories"](#) and [Section 5.4, "Working with Perspectives"](#).
- To ensure validity of content, OracleAS Portal can route content for approval before it is published on the page. Simple or multi-step processes can be defined with single or multiple reviewers at each step. Notifications are sent to each approver in the approval process indicating that action is required, while the Status portlet tracks the item's progression from the contributor's point of view. Expiry notifications alert users to content that is about to expire. See [Section 5.5, "Setting Up Approvals"](#).
- Additional features support collaborative document creation, ease content management tasks, and make finding published items very easy. These features include item version control, check-in/check-out, publish and expiration dates, and automatic indexing. Users can also subscribe to items or pages and are notified whenever the subscribed content changes. See [Section 5.6, "Configuring Page Group Item Management Settings"](#).

5.2 Working with Attributes, Page Types, and Item Types

OracleAS Portal provides an assortment of base attributes, page types, and item types that you can expose to the user community. Each page and item type includes attributes that are used to store information about the page or item. If the base page and item types do not quite meet your requirements, you can create your own page and item types. This means that you can have complete control over what information is stored by specifying which attributes to include in the page or item type. If the base attributes do not cover the kind of information you want to store about your pages or items, you can create your own attributes and add those to your page and item types. You can control exactly which page and item types are made available to the users of your page group.

OracleAS Portal also includes a selection of built-in extensible item types. If you do not want to create your own item types, you can edit these built-in item types to meet your requirements.

This section contains the following sub-sections:

- [Working with Attributes](#)
- [Working with Page Types](#)
- [Working With Item Types](#)

Privileges: Any user with at least the Manage Classifications privilege on a page group can create and manage attributes and types. To edit the built-in page and item types, you must have at least the Manage Classifications privilege on the Shared Objects page group.

5.2.1 Working with Attributes

There are two types of attributes:

Content Attributes

Content attributes are associated with item types and page types, and store information about an item or page, such as the associated category, description, or perspectives. These attributes are included in the add and edit pages where users can provide information about the item or page they are adding or editing. Page group administrators can create their own item types and page types and specify exactly what information they want users to supply by choosing which attributes to include. In addition, page group administrators can create their own attributes for containing extra information.

For a list of the content attributes provided by default, see [Section B.2.1, "Base Content Attributes"](#).

Display Attributes

Display attributes are associated with regions, and display information about an item or portlet, such as the author, display name, and creation date. Page designers can choose which attributes to display in a region. Some content attributes can also be used as display attributes. See [Section 7.5.2.10, "Changing the Attributes Displayed in a Region"](#).

For a list of the display attributes provided by default, see [Section B.2.2, "Base Display Attributes"](#).

5.2.1.1 Creating an Attribute

To create an attribute:

1. In the Navigator, click the link for the page group in which you want to create the attribute.

To get to the Navigator click the Navigator link on any page. By default you can find a Navigator link on the Portal Builder page.

2. Click the **Attributes** link.

Tip: If you create an attribute in a particular page group, that attribute is available only in that page group. If you want the attribute to be available in multiple page groups, either create it in the Shared Objects page group, or (if the attribute already exists) promote it to the Shared Objects page group. See [Section 4.5, "Sharing Objects Between Page Groups"](#).

3. Next to Create New, click the **Attribute** link.
4. In the **Name** field, enter a name for the attribute. The name is used internally only.

The name must be unique within the page group and the Shared Objects page group. The name is limited to 60 characters, and can contain only alphanumeric characters (A-Z a-z 0-9) and the underscore character (_); spaces and other special characters are not allowed.

5. In the **Display Name** field, enter a descriptive name for the attribute. The display name is displayed as a label for the attribute when users add or edit an item or page of a type that includes the attribute.

The display name is limited to 60 characters and can contain any character, including spaces.

6. From the **Datatype** list, choose the type of data that the attribute will store.
 - **Boolean** stores a value of TRUE or FALSE.
 - **Date** stores a date in the format DD-MON-YYYY HH12:MI PM, for example, 20-SEP-2002 10:57 AM.

- **File** stores a file, such as a Microsoft Excel spreadsheet or an HTML document.
- **Number** stores a numeric value, for example, 8479.
- **PL/SQL** stores PL/SQL code, for example, `http.p('Hello World');`
- **Text** stores a text string.
- **URL** stores the URL of a Web site or page, for example, `http://www.oracle.com`.

7. Click **Create**.

8. Click **Close**.

5.2.1.2 Editing an Attribute

You can specify how an attribute is displayed when users add or edit an item or page of a type that includes the attribute. For example, you can change the label for the attribute by editing the attribute's display name.

To edit an attribute:

1. Use the Navigator to browse to the attribute that you want to edit.

To get to the Navigator click the Navigator link on any page. By default you can find a Navigator link on the Portal Builder page.

Tip: If the attribute is shared, it will be in the Shared Objects page group. See [Section 4.5, "Sharing Objects Between Page Groups"](#).

2. In the row for the attribute, click the **Edit** link.

3. In the **Name** field, edit the name of the attribute. The name is used internally only.

The name must be unique within the page group and the Shared Objects page group. The name is limited to 60 characters and can contain only alphanumeric characters (A-Z a-z 0-9) and the underscore character (`_`); spaces and other special characters are not allowed.

4. In the **Display Name** field, edit the descriptive name of the attribute. The display name is displayed as a label for the attribute when users add or edit an item or page of a type that includes the attribute.

The display name is limited to 60 characters and can contain any character, including spaces.

5. Select **Enable Translations** if you want users to be able to translate the values stored in the attribute into different languages.

If you clear this check box, the values stored in the attribute will be the same in all languages.

6. For Date, Number, and URL attributes:

In the **List Of Values** field, enter the name of a list of values from which users can choose a value for the attribute. If you are not sure of the name of the list of values, click the **List** icon and select from the list provided.

Note: The list of values must already exist.

7. For PL/SQL attributes:

In the **PL/SQL Execute Options** radio group, select which privileges to use when executing the PL/SQL stored in the attribute:

- **Public** executes the PL/SQL with the privileges of the OracleAS Portal PUBLIC schema.
- **Creator** executes the PL/SQL with the privileges of the schema associated with the user who created the item or page that includes the PL/SQL attribute.
- **Schema** executes the PL/SQL with the privileges of a specific schema. If you select this radio button, enter the name of the schema in the field provided. If you are not sure of the name of the schema, click the **Browse Database Schemas** icon and select from the list provided.

8. For Text attributes:

- a. In the **Length** field, enter the number of characters the attribute can store.
- b. In the **Display Option** radio group, select how to display the attribute when users add or edit an item or page of a type that includes the attribute:
 - **Single-line Field** displays the attribute as a field that contains a single line of text.
 - **Multi-line Field** displays the attribute as a field that contains multiple lines of text.

- **List Of Values** displays the attribute as a list from which users can choose a value.

If you select this radio button, enter the name of the list of values in the field provided. If you are not sure of the name of the list of values, click the **List** icon and select from the list provided.

Note: The list of values must already exist.

9. Click **OK**.

5.2.1.3 Deleting an Attribute

When you delete an attribute, you also remove the attribute and its values from any items and pages that include it.

To delete an attribute:

1. Use the Navigator to browse to the attribute that you want to delete.
2. In the row for the attribute, click the **Delete** link.
3. In the confirmation page, click **Yes**.

5.2.2 Working with Page Types

Page types define the contents of a page and the information that is stored about a page. The information stored about a page is determined by the attributes of the page type.

By default, OracleAS Portal includes several base page types so that page managers can get started creating pages right out of the box. For a complete list of base page types, see [Section B.3, "Base Page Types"](#).

However, you may find that you want to store more information about your pages than the base page types allow. If this is the case, you can create your own page types. You base your page type on one of the base page types. The page type automatically inherits all of the base page type's attributes. But, after you create your page type, you can edit it to add other attributes that are specific to your requirements. These attributes can be other default OracleAS Portal attributes, or attributes that you have created yourself.

In addition to adding attributes to page types, you can also add calls to PL/SQL or HTTP procedures. You can pass attributes as parameters to those procedures if required.

5.2.2.1 Creating a Page Type

To create a page type:

1. In the Navigator, click the link for the page group in which you want to create the page type.

To get to the Navigator click the Navigator link on any page. By default you can find a Navigator link on the Portal Builder page.

Tip: If you create a page type in a particular page group, that page type is available only in that page group. If you want the page type to be available in multiple page groups, either create it in the Shared Objects page group, or (if the page type already exists) promote it to the Shared Objects page group. See [Section 4.5, "Sharing Objects Between Page Groups"](#).

2. Click the **Page Types** link.
3. Next to Create New, click the **Page Type** link.
4. In the **Name** field, enter a name for the page type. The name is used internally only.

The name must be unique within the page group and the Shared Objects page group. The name is limited to 60 characters and can contain only alphanumeric characters (A-Z a-z 0-9) and the underscore character (_); spaces and other special characters are not allowed.

5. In the **Display Name** field, enter a descriptive name for the page type. The display name is used in the Create Page **Page Type** list, so shorter display names are better.

The display name is limited to 60 characters and can contain any character, including spaces.

6. From the **Base Page Type** list, choose the base page type from which you want your page type to inherit attributes. You can choose from Standard, PL/SQL, or URL.
7. Click **Create**.

8. Click **Close**.

5.2.2.2 Editing a Page Type

When you first create a page type, it is exactly the same as the base page type from which you chose to inherit attributes. To truly customize the page type, you need to edit it to add more attributes, and possibly procedure calls.

Note: You cannot edit the base page types.

Editing the Basic Properties of a Page Type

To edit the basic properties of a page type:

1. Use the Navigator to browse to the page type that you want to edit.

To get to the Navigator click the Navigator link on any page. By default you can find a Navigator link on the Portal Builder page.

Tip: If the page type is shared, it will be in the Shared Objects page group. See [Section 4.5, "Sharing Objects Between Page Groups"](#).

2. In the row for the page type, click the **Edit** link.
3. In the **Name** field, edit the name of the page type. The name is used internally only.

The name must be unique within the page group and the Shared Objects page group. The name is limited to 60 characters and can contain only alphanumeric characters (A-Z a-z 0-9) and the underscore character (_); spaces and other special characters are not allowed.

4. In the **Display Name** field, edit the descriptive name of the page type. The display name is used in the Create Page **Page Type** list, so shorter display names are better.

The display name is limited to 60 characters and can contain any character, including spaces.

5. In the **Description** field, enter information about the page type that may be useful to others, such as its arguments, functionality, or usage. The description is displayed only when editing the page type.

6. In the **Icon** field, enter the path and file name of an image to associate with the page type. Click **Browse** to locate the image if you are not sure of its path or file name. When you click **Apply** or **OK**, the file is uploaded to the Oracle Application Server Metadata Repository.

Note: This icon is not currently used within OracleAS Portal. The icon may be used in future releases.

7. Click **OK**.

Adding Attributes to a Page Type

To add attributes to a page type:

1. Use the Navigator to browse to the page type that you want to edit.
To get to the Navigator click the Navigator link on any page. By default you can find a Navigator link on the Portal Builder page.

Tip: If the page type is shared, it will be in the Shared Objects page group. See [Section 4.5, "Sharing Objects Between Page Groups"](#).

2. In the row for the page type, click the **Edit** link.
3. Click the **Attributes** tab.
4. In the **Available Attributes** list, select the attributes that you want to add to the page type.
5. Click the **Move Right** icon to move the selected attributes to the **Selected Attributes** list.
The order of attributes in the **Selected Attributes** list determines the order in which the attributes are displayed when users create or edit a page of this type. Use the icons to the right of the list to change the order.
6. Click **Apply** to add the attributes to the page type.
7. When you have added the attributes, you can change their display properties if necessary:

- a. In the **Default Value** field, enter the value to use by default for the attribute. If page managers do not specify a value for the attribute, the default value is used. You can leave this field blank if you prefer.
- b. Select the **Required** check box if you want it to be mandatory for page managers to provide a value for the attribute. The attribute will be displayed on the first page of the Create Page Wizard, and the Main tab of the Edit Page page.

If you do not select this check box, page managers do not need to provide a value for the attribute and the attribute will be displayed on the Optional tab of the Edit Page page.

8. Click **OK**.

To remove attributes from the page type, select the attributes in the **Selected Attributes** list, and click the **Move Left** icon.

Add a Procedure Call to a Page Type

For an example of how you might use a procedure call in a page or item type, see [Example 5-1, "Adding an HTTP Procedure Call to an Item Type"](#) or [Example 5-2, "Adding a PL/SQL Procedure Call to an Item Type"](#).

To add a procedure call to a page type:

1. Use the Navigator to browse to the page type that you want to edit.

To get to the Navigator click the Navigator link on any page. By default you can find a Navigator link on the Portal Builder page.

Tip: If the page type is shared, it will be in the Shared Objects page group. See [Section 4.5, "Sharing Objects Between Page Groups"](#).

2. In the row for the page type, click the **Edit** link.
3. Click the **Procedures** tab.
4. From the **Type** list, choose whether the call is to an **HTTP** or **PL/SQL** procedure.
5. In the **Procedure Call** field, enter one of the following:
 - The URL of the HTTP procedure, including the protocol used to access it, for example:

`http://search.oracle.com`

- The name of the PL/SQL procedure. The procedure must already exist in the database and must be prefixed with its owning schema, for example:

```
SCOTT.MY_PROC
```

The PUBLIC user must be granted execute privileges on the procedure.

6. In the **Link Text** field, enter the text to display as a hypertext link that users can click to execute the procedure call.

This link is displayed only if the page includes a Page Function item and you do not select **Display Procedure Results With Page**, or you have not specified an icon. For information about adding a Page Function item to a page, see [Including a Page Type's Procedure Call on a Page](#).

7. In the **Icon** field, enter the path and file name of an image to associate with this procedure call. If you specify an icon, it is used instead of the **Link Text**, however you must still enter a value in the **Link Text** field to serve as the image's rollover text.

Click **Browse** to locate the image if you are not sure of its path or file name.

8. Select **Display Procedure Results With Page** to display the results of the procedure call directly in the page instead of displaying a link for users to click. This makes the results immediately visible to users, rather than requiring them to click a link to execute the procedure call themselves.
9. If the procedure you are calling has parameters, you can pass values to those parameters using the page type's attributes.
 - a. In the **Attribute** list, choose the attribute whose values you want to pass to a parameter in the procedure.
 - b. In the **Pass As** field, enter the parameter name if it is different from the attribute name.

10. Click **Apply** to add the procedure call to the page type.

11. Click **OK**.

To remove a procedure call from the page type, click the **Delete Procedure** icon next to the procedure call in the Existing Procedure Calls section.

To edit an existing procedure call, for example, to add more parameter/attribute mappings, click the **Edit Procedure** icon next to the procedure call in the Existing Procedure Calls section. You can then edit the procedure call properties in the fields below. Remember to click **Apply** to save your changes.

Including a Page Type's Procedure Call on a Page

If a page type includes a procedure call, the link to execute the procedure call will be displayed in a page of that type only if a Page Function item is added to the page.

To include a page type's procedure call on a page:

1. In the Page Groups portlet, under Edit a Page, click the Browse Pages icon next to the Name field.
2. Select the page to which you want to add the Page Function item, then click Edit.
3. In the region where you want to add the Page Function item, click the Add Item icon.

If you do not see the Add Item icon, the region may be a portlet region, in which case, you cannot add items to this region.

4. From the **Built-In Navigation Item Types** list, choose **Page Function**.

If there are no page functions associated with the current page, this item type is not displayed. If you know there are page functions, but this item type does not appear in the list, contact your page group administrator. Your administrator selects which item types to display here.

If you do not see **Page Function** in the list, the page may not have any page functions associated with it or the Page Function item type may not have been included in the page group. For information about how to include this item type, see [Section 5.2.3.3, "Making an Item Type Available to a Page Group"](#).

5. Click **Next**.
6. From the **Page Function** list, choose the page function that you want to include in the page.
7. Click **Finish**.

5.2.2.3 Making a Page Type Available to a Page Group

When you create a page type, it is not immediately available for use by page creators. This is because you will probably want to edit the page type first to add attributes and procedure calls. When you are happy with the page type, and are ready for page creators to start creating pages of that type, you must make the page type available in the page group.

To make a page type available to a page group:

1. From the Page Groups portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default, the Page Groups portlet is located on the Build tab of the Builder page.

2. Click the **Configure** tab.
3. In the Page Types and Template section, click the **Edit** link.

Note: You can also reach the Page Defaults page by clicking the **Configure** link on the first page of the Create Page Wizard.

4. From the **Hidden Page Types** list, select the page type that you want to make available.

The **Hidden** and **Visible Page Type** lists include all the base page types, and the page types owned by this page group and the Shared Objects page group.

5. Click the **Move Right** icon to move the selected page type into the **Visible Page Types** list.

The order of page types in the **Visible Page Types** list determines the order in which the page types are displayed in the Page Type list when creating a page.

6. Click **OK** to return to the Configure tab.
7. Click **Close**.

You can also exclude a page type from a page group, meaning that page creators cannot create pages of that type in the page group. For example, if you have created your own page types, you might want to exclude some of the base page types from the page group. To do this, select the page type in the **Visible Page Type** list and click the **Move Left** icon.

5.2.2.4 Deleting a Page Type

When you delete a page type, all pages of that type and all the items in those pages are also deleted. You cannot undo this action.

Note: You cannot delete the base page types.

To delete a page type:

1. Use the Navigator to browse to the page type that you want to delete.

To get to the Navigator click the Navigator link on any page. By default you can find a Navigator link on the Portal Builder page.

Tip: If the page type is shared, it will be in the Shared Objects page group. See [Section 4.5, "Sharing Objects Between Page Groups"](#).

2. In the row for the page type, click the **Delete** link.
3. In the confirmation page, click **Yes**.

5.2.3 Working With Item Types

Item types define the contents of an item and the information that is stored about an item. The information stored about an item is determined by the attributes of the item type.

By default, OracleAS Portal includes several base item types to cover the most common content that contributors will want to add. OracleAS Portal also includes several built-in custom item types so that content contributors can get started adding content right out of the box. For a complete list of base and built-in item types, see [Section B.4, "Base Item Types"](#).

However, you may find that you want to store more information about your items than the built-in item types allow. If this is the case, you can extend the built-in item types to meet your requirements. You can add different attributes to the built-in item types to store exactly the information that you want. You can also add calls to PL/SQL and HTTP procedures and even pass attributes to the parameters of those procedures. For example, if the Review item type includes a Search attribute to store a search string, you could add a procedure call to a search engine and pass the search string to that search engine. When users run the search engine, the search results for the search string are displayed.

If you prefer, you can create your own item types. You can base an item type on one of the base item types. Basing your item type on a base item type means that your item type will inherit certain attributes. You can then extend your item type to include other attributes and procedure calls. You can also choose to base your item type on none of the base item types (choose **<None>** from the **Base Item Type** list), which gives you complete control over the attributes included in the item type.

5.2.3.1 Creating an Item Type

To create an item type:

1. In the Navigator, click the link for the page group in which you want to create the item type.

To get to the Navigator click the Navigator link on any page. By default you can find a Navigator link on the Portal Builder page.

Tip: If you create an item type in a particular page group, that item type is available only in that page group. If you want the item type to be available in multiple page groups, either create it in the Shared Objects page group, or (if the item type already exists) promote it to the Shared Objects page group. See [Section 4.5, "Sharing Objects Between Page Groups"](#).

2. Click the **Item Types** link.
3. Next to Create New, click the **Item Type** link.
4. In the **Name** field, enter a name for the item type. The name is used internally only.

The name must be unique within the page group and the Shared Objects page group. The name is limited to 60 characters and can contain only alphanumeric characters (A-Z a-z 0-9) and the underscore character (_); spaces and other special characters are not allowed.

5. In the **Display Name** field, enter a descriptive name for the item type. The display name is used in the Add Item **Item Type** list, so shorter display names are better.

The display name is limited to 60 characters and can contain any character, including spaces.

6. From the **Base Item Type** list, choose the base item type from which you want your item type to inherit attributes. You can choose from None, Base File, Base Image Map, Base Image, Base PL/SQL, Base Page Link, Base Text, and Base URL.
7. Click **Create**.
8. Click **Close**.

5.2.3.2 Editing an Item Type

When you first create an item type, it includes exactly the same attributes as the base item type on which you based it. If you chose <None> as the base item type, your new item type includes only the Display Name attribute. To truly customize the item type, you need to edit it to add more attributes, and possibly procedure calls.

Note: You cannot edit the base item types. However you can extend the built-in item types.

Editing the Basic Properties of an Item Type

To edit the basic properties of an item type:

1. Use the Navigator to browse to the item type that you want to edit.

To get to the Navigator click the Navigator link on any page. By default you can find a Navigator link on the Portal Builder page.

Tip: If the item type is shared (or is one of the built-in item types), it will be in the Shared Objects page group. See [Section 4.5, "Sharing Objects Between Page Groups"](#).

2. In the row for the item type, click the **Edit** link.
3. In the **Name** field, edit the name of the item type. The name is used internally only.

The name must be unique within the page group and the Shared Objects page group. The name is limited to 60 characters and can contain only alphanumeric characters (A-Z a-z 0-9) and the underscore character (_); spaces and other special characters are not allowed.

4. In the **Display Name** field, edit the descriptive name of the item type. The display name is used in the Add Item **Item Type** list, so shorter display names are better.

The display name is limited to 60 characters and can contain any character, including spaces.

5. In the **Description** field, enter information about the item type that may be useful to others, such as its arguments, functionality, or usage. The description is displayed only when editing the item type.

6. In the **Icon** field, enter the path and file name of an image to associate with the item type. Click **Browse** to locate the image if you are not sure of its path or file name. When you click **Apply** or **OK**, the file is uploaded to the Oracle Application Server Metadata Repository.

Note: This icon is not currently used within OracleAS Portal. The icon may be used in future releases.

7. You can create your own help to display when users click the context sensitive help icon while adding an item of this type. To associate your custom help with the item type, enter the URL of the help in the **Help URL For Add Item Wizard** field
8. You can also create your own help to display when users click the context sensitive help icon while editing an item of this type. To associated your custom help with the item type, enter the URL of the help in the **Help URL For Edit Item Wizard** field.
9. Click **OK**.

Adding Attributes to an Item Type

To add attributes to an item type:

1. Use the Navigator to browse to the item type that you want to edit.
To get to the Navigator click the Navigator link on any page. By default you can find a Navigator link on the Portal Builder page.

Tip: If the item type is shared (or is one of the built-in item types), it will be in the Shared Objects page group. See [Section 4.5, "Sharing Objects Between Page Groups"](#).

2. In the row for the item type, click the **Edit** link.
3. Click the **Attributes** tab.
4. In the **Available Attributes** list, select the attributes that you want to add to the item type.
5. Click the **Move Right** icon to move the selected attributes to the **Selected Attributes** list.

The order of attributes in the **Selected Attributes** list determines the order in which the attributes are displayed when users add or edit an item of this type. Use the icons to the right of the list to change the order.

6. Click **Apply** to add the attributes to the item type.
7. When you have added the attributes, you can change their display properties if necessary:
 - a. In the **Default Value** field, enter the value to use by default for the attribute. If content contributors do not specify a value for the attribute, the default value is used. You can leave this field blank if you prefer.

You can use PL/SQL expressions and function calls to determine the default value for an attribute. You must precede the expression or function call with a # character. The function being called must already exist in the database and must be prefixed with its owning schema.

For example, to set the default value of the Author attribute to the current user, you would set the default value of the attribute to #USER. To set the default value of the Publish Date attribute to the first day of the month, you would set the default value of the attribute to #TO_CHAR (LAST_DAY (SYSDATE) +1, 'DD-MON-YYYY HH12:MI PM'). If you had a function (GET_CURRENT_PROJECT) that returns the current project id of a user, you could set the default value of a Project ID attribute to #PROJECTS.GET_CURRENT_PROJECT.

Note: You cannot pass attribute values as parameters to a function when it is called from an attribute default value. You can however pass PL/SQL expressions as parameters. You can use expressions and function calls only for the default values of attributes, not for the actual values of attributes. If you are using an expression to determine the default value of a date attribute, you must make sure that the date value is converted to the DD-MON-YYYY HH12:MI PM date format as shown in the second example above.

- b. Select the **Required** check box if you want it to be mandatory for content contributors to provide a value for the attribute. The **Required** icon will be displayed next to the attribute when contributors add or edit an item of this type.

If you do not select this check box, content contributors do not need to provide a value for the attribute.

- c. Clear the **Add Wizard** check box if you do not want to display the attribute on the Add Item Wizard.

For example, to make it easier for content contributors to add an item of this type, you might want to limit the number of attributes displayed on the Add Item Wizard. Contributors can provide values for the extra attributes when they edit the item.

- d. Clear the **Edit Wizard** check box if you do not want to display the attribute on the Edit Item pages.

For example, if you want to supply a default value for an attribute, and do not want content contributors to be able to change that value, clear both the **Add Wizard** and **Edit Wizard** check boxes so that the attribute does not display in the wizards.

You could create an item type called Performance Review and add the Expiration Period attribute to it. You set a default value for the attribute, 01-JAN-2003, so that every Performance Review item added by users expires on this date. Since users do not need to know about or edit this date, you clear the **Add Wizard** and **Edit Wizard** check boxes for the attribute. When users add and edit their performance review items, they will not see the Expiration Period attribute even though it is stored for each item.

- 8. Click **OK**.

To remove attributes from the item type, select the attributes in the **Selected Attributes** list, and click the **Move Left** icon.

Tip: If you intend any of the attributes that you add to include important information that you want users to see immediately, you should instruct page designers to display those attributes in the regions on their pages. See [Section 7.5.2.10, "Changing the Attributes Displayed in a Region"](#).

Adding a Procedure Call to an Item Type

For an example of how you might use a procedure call in an item type, see [Example 5–1, "Adding an HTTP Procedure Call to an Item Type"](#) or [Example 5–2, "Adding a PL/SQL Procedure Call to an Item Type"](#).

To add a procedure call to an item type:

- 1. Use the Navigator to browse to the item type that you want to edit.

To get to the Navigator click the Navigator link on any page. By default you can find a Navigator link on the Portal Builder page.

Tip: If the item type is shared (or is one of the built-in item types), it will be in the Shared Objects page group. See [Section 4.5, "Sharing Objects Between Page Groups"](#).

2. In the row for the item type, click the **Edit** link.
3. Click the **Procedures** tab.
4. From the **Type** list, choose whether the call is to an **HTTP** or **PL/SQL** procedure.
5. In the **Procedure Call** field, enter one of the following:

- The URL of the HTTP procedure, including the protocol used to access it, for example:

```
http://search.oracle.com
```

- The name of the PL/SQL procedure. The procedure must already exist in the database and must be prefixed with its owning schema, for example:

```
SCOTT.MY_PROC
```

The PUBLIC user must be granted execute privileges on the procedure.

6. In the **Link Text** field, enter the text to display as a hypertext link that users can click to execute the procedure call.

This link is displayed only if the region containing the item displays the Associated Function attribute and you do not select **Display Procedure Results With Item**, or you have not specified an icon. For information about adding the Associated Function attribute to a region, see [Including an Item Type's Procedure Call on a Page](#).

7. In the **Icon** field, enter the path and file name of an image to associate with this procedure call. If you specify an icon, it is used instead of the **Link Text**, however you must still enter a value in the **Link Text** field to serve as the image's rollover text.

Click **Browse** to locate the image if you are not sure of its path or file name.

8. Select **Display Procedure Results With Item** to display the results of the procedure call directly in the page instead of displaying a link for users to click.

This makes the results immediately visible to users, rather than requiring them to click a link to execute the procedure call themselves.

9. If the procedure you are calling has parameters, you can pass values to those parameters using the item type's attributes.
 - a. In the **Attribute** list, choose the attribute whose values you want to pass to a parameter in the procedure.
 - b. In the **Pass As** field, enter the parameter name if it is different from the attribute name.
10. Click **Apply** to add the procedure call to the item type.
11. Click **OK**.

To remove a procedure call from the item type, click the **Delete Procedure** icon next to the procedure call in the Existing Procedure Calls section.

To edit an existing procedure call, for example, to add more parameter/attribute mappings, click the **Edit Procedure** icon next to the procedure call in the Existing Procedure Calls section. You can then edit the procedure call properties in the fields below. Remember to click **Apply** to save your changes.

Example 5–1 Adding an HTTP Procedure Call to an Item Type

Imagine that your portal provides movie reviews to subscribers. To customize the hundreds of movie reviews you plan to upload, you create a Movie Review item type to use for each review. Knowing that users will want to find additional information about each movie, you decide to include a link to a search engine within the review.

To include this link, you choose HTTP as the procedure type, and add the following to the Procedure Call field ([Figure 5–1](#)):

```
http://www.google.com/search
```

You include the Link Text Click here for more. . . , and you specify an icon to associate with the procedure. You choose not to display the procedure results with the item because you want users to click the icon to access the search.

For the search engine to return information about the appropriate movie, you need to pass it the movie title. Say your Movie Review item type includes an attribute called Movie Title. To pass the value in this attribute to the search engine, you select it in the Attribute list (you could also use the Display Name attribute if it is used to store the title of the movie).

Finally, you need to make sure that the attribute value is sent to the correct search engine parameter. In the case of Google, the search parameter name is `q`, so you enter this name in the Pass As field (Figure 5-2).

This information is appended to the Procedure Call as follows:

```
http://www.google.com/search?q=<MovieTitle>
```

Each movie review will now include a link to a customized search based on the movie title (Figure 5-3).

When users click the specified icon, the customized search content (based on the movie title) displays (Figure 5-4). The movie title, which is the search criteria, displays at the top of the search results page.

Figure 5-1 Adding an HTTP Procedure Call to an Item Type

Type	HTTP
Procedure Call	http://www.google.com/search

Figure 5-2 Passing Attribute Values to HTTP Procedure Parameters

Attribute	Movie Title	Pass As	q
-----------	-------------	---------	---

Figure 5-3 Example Movie Review Item

Oracle Application Server
Portal **My Movie Review Portal**

[Years 1950-1951: A Documentary](#) 

An astoundingly robust film full of dazzling...
[Click here for more...](#)

Figure 5-4 Example Movie Review Procedure Call Results

[Advanced Search](#) [Preferences](#) [Language Tools](#) [Search Tips](#)

Years 1950-1951: A Documentary

Example 5-2 Adding a PL/SQL Procedure Call to an Item Type

Imagine that you have written the following procedure that displays the creator and create date of an object in an HTML table:

```
--
-- procedure display_attributes
-- created Monday 17-JUN-2002 10:35
--
create or replace
procedure display_attributes (
  p_creator in varchar2,
  p_create_date in varchar2)
as
begin
  http.p('<table><tr><td><b>Creator:</b></td>'
    || '<td>' || p_creator || '</td></tr>'
    || '<tr><td><b>Create Date:</b></td>'
    || '<td>' || p_create_date || '</td></tr>'
    || '</table>');
exception
when others then
  http.p(sqlerrm);
end;
```

You can add a call to this procedure to an item type (My Item Type) so that this information is displayed for items of that type.

You choose PL/SQL as the procedure type, and add the following to the Procedure Call field (Figure 5-5):

```
SCOTT.DISPLAY_ATTRIBUTES
```

You include the link text Display Attributes, and you specify an icon to associate with the procedure.

For the procedure to return the appropriate attribute values, you need to pass it the attribute names. Your procedure includes two parameters: p_creator and p_create_date. You need to pass these two parameters information from the Creator and Create Date attributes (Figure 5-6).

Each item of type My Item Type will now include a link to run the procedure (Figure 5-7).

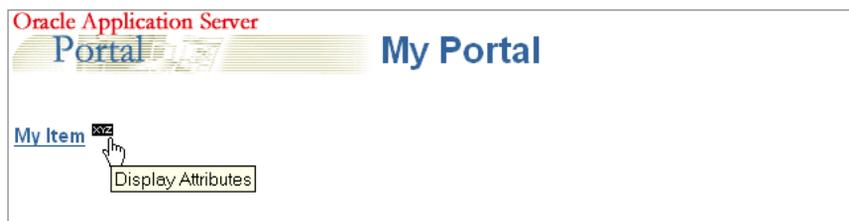
When users click the specified icon, the additional attributes are displayed as an HTML table (Figure 5-8).

Figure 5–5 Adding a PL/SQL Procedure Call to an Item Type

Type	PL/SQL
Procedure Call	SCOTT.DISPLAY_ATTRIBUTES

Figure 5–6 Passing Attribute Values to PL/SQL Procedure Parameters

Attribute	Creator	Pass As	p_creator
Attribute	Create Date	Pass As	p_create_date

Figure 5–7 Example My Item Type Item**Figure 5–8 Example My Item Procedure Call Results**

Creator:	SCOTT
Create Date:	25-JUN-02

Including an Item Type's Procedure Call on a Page

If an item type includes a procedure call, the link to execute the procedure call will be displayed with an item of that type only if the Associated Functions attribute is displayed in the region that contains the item.

To include an item type's procedure call on a page:

1. In the Page Groups portlet, under Edit a Page, click the **Browse Pages** icon next to the **Name** field.
2. Select the page to which you want to add the link, then click **Edit**.
3. In the region to which you want to add the link, click the **Edit Region** icon.

4. Click the **Attributes/Style** tab.
5. In the **Available Attributes** list, select **Associated Function**.
6. Click the **Move Right** arrow.
7. Click **Apply**.
8. Click **Close**.

5.2.3.3 Making an Item Type Available to a Page Group

When you create an item type, it is not immediately available for use by content contributors. This is because you will probably want to edit the item type first to add attributes and procedure calls. When you are happy with the item type, and are ready for content contributors to start adding items of that type, you must make the item type available in the page group.

To make an item type available to a page group:

1. From the Page Groups portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default, the Page Groups portlet is located on the Build tab of the Builder page.

2. Click the **Configure** tab.
3. In the Content Type and Classification section, click the **Edit** link.

Note: You can also reach the Select Content Type and Configure Content page by clicking the **configure the list of available item types** link on the first page of the Add Item Wizard.

4. From the **Hidden Item Types** list, select the item type that you want to make available.

The **Hidden** and **Visible Item Type** lists include all the item types owned by this page group and the Shared Objects page group.

5. Click the **Move Right** icon to move the selected item type into the **Visible Item Types** list.

The order of page types in the **Visible Item Types** list determines the order when items in a region are grouped by item type. For information about how to group items by item type, see [Section 7.5.2.12, "Grouping Items in a Region"](#).

6. Click **OK** to return to the Configure tab.
7. Click **Close**.

You can also exclude an item type from a page group, meaning that content contributors cannot add items of that type to pages in the page group. For example, if you have created your own item types, you might want to exclude some of the built-in item types from the page group. To do this, select the item type in the **Visible Item Type** list and click the **Move Left** icon.

5.2.3.4 Deleting an Item Type

When you delete an item type, all items of that type are also deleted. You cannot undo this action.

Note: You cannot delete the base item types.

To delete an item type:

1. Use the Navigator to browse to the item type that you want to delete.

To get to the Navigator click the Navigator link on any page. By default you can find a Navigator link on the Portal Builder page.

Tip: If the item type is shared, it will be in the Shared Objects page group. See [Section 4.5, "Sharing Objects Between Page Groups"](#).

2. In the row for the item type, click the **Delete** link.
3. In the confirmation page, click **Yes**.

5.3 Working with Categories

Categories answer the question "What is this item or page?" and are used to classify content. Sales Report, Action Item, Corporate Graphic, and Location Maps are all examples of typical categories. The purpose of categories is to enable users to quickly display a listing of a particular type of content. For example, if you want users to be able to quickly access all of the company's sales reports, you could create a category called Sales Report. When a user adds an item or page to the page group, they can assign it to the Sales Report category. To find all of the available sales

reports, other users can search on the Sales Report category to see a listing of pages and items that belong to that category.

For information about assigning items and pages to a category, see [Section 2.1.10.1, "Classifying the Content of an Item"](#) and [Section 7.8.5, "Assigning a Category to a Page"](#). For information about searching on categories, see [Section 1.2.1.2, "Performing an Advanced Search"](#).

Since categories have the potential to be quite large, you can also create a hierarchy of categories. For example, in the Sales Report category, you might want to have separate, subordinate categories for the Eastern Division, the Central Division, and the Western Division.

When you create a category, a page is also created. This page is used to list all the items and pages that belong to the category. For example, if the items in a region are grouped by category, the name of the category is displayed as a link in the group by banner. When users click this link, the category's page is displayed, listing all the items and pages that belong to the category.

The first time you create a category in a page group, a page template is also created and all category pages in the page group are based on this page template. This means that if you want to change the way category pages look, you just need to edit the category page template (rather than each individual category page).

Privileges: Any user with at least the Manage Classifications privileges on a page group can create and manage categories.

This section contains the following sub-sections:

- [Creating a Category](#)
- [Editing a Category](#)
- [Making a Category Available to a Page Group](#)
- [Deleting a Category](#)

5.3.1 Creating a Category

To create a category:

1. In the Navigator, click the link for the page group in which you want to create the category.

To get to the Navigator click the Navigator link on any page. By default you can find a Navigator link on the Portal Builder page.

Tip: If you create a category in a particular page group, that category is available only in that page group. If you want the category to be available in multiple page groups, either create it in the Shared Objects page group, or (if the category already exists) promote it to the Shared Objects page group. See [Section 4.5, "Sharing Objects Between Page Groups"](#).

2. Click the **Categories** link.
3. Next to Create New, click the **Category** link. Or, if you want to create the category under an existing category, click the **Create** link next to the category under which you want to create the new category.
4. In the **Name** field, enter a name for the category. The name can be used in a URL to directly access the category. Direct access URLs take the following format:

```
http://<hostname>:<portnumber>/pls/<dad>/url/page/<pagegroupname>/<categoryname>
```

For example:

```
http://mymachine.mycompany.com:5000/pls/portal/url/page/myportal/mycategory  
http://mymachine.mycompany.com:5000/pls/portal/url/page/myportal/mycategory/  
mysubcategory
```

The name must be unique within the page group and the Shared Objects page group. The name is limited to 60 characters and can contain only alphanumeric characters (a-z A-Z 0-9) and the underscore character (_); spaces and special characters are not allowed.

5. In the **Display Name** field, enter a descriptive name for the category.
The display name can contain up to 240 characters and can contain any character, including spaces.
6. Click **Create**.
7. Click **Close**.

5.3.2 Editing a Category

When you create a category, not all of the available properties are available. You can edit a category after creating it to specify the rest of the available properties.

Editing the Basic Properties of a Category

To edit the basic properties of a category:

1. Use the Navigator to browse to the category that you want to edit.

To get to the Navigator click the Navigator link on any page. By default you can find a Navigator link on the Portal Builder page.

Tip: If the category is shared, it will be in the Shared Objects page group. See [Section 4.5, "Sharing Objects Between Page Groups"](#).

2. In the row for the category, click the **Properties** link.
3. In the **Name** field, edit the name of the category. The name can be used in a URL to directly access the category.

The name must be unique within the page group and the Shared Objects page group. The name is limited to 60 characters and can contain only alphanumeric characters (a-z A-Z 0-9) and the underscore character (_); spaces and other special characters are not allowed.

4. In the **Display Name** field, edit the descriptive name of the category.
The display name can contain up to 240 characters and can contain any character, including spaces.
5. In the **Description** field, enter information about the category that may be useful to other users. The description is displayed only when editing the category.
6. Click **OK**.

Specifying Category Images

To specify category images:

1. Use the Navigator to browse to the category that you want to edit.

To get to the Navigator click the Navigator link on any page. By default you can find a Navigator link on the Portal Builder page.

Tip: If the category is shared, it will be in the Shared Objects page group. See [Section 4.5, "Sharing Objects Between Page Groups"](#).

2. In the row for the category, click the **Properties** link.
3. Click the **Image** tab.
4. In the **Title Image Name** field, enter the path and file name of an image to use when the category is displayed in a list of objects item.
5. In the **Rollover Image Name** field, enter the path and file name of an image to use as a rollover image when the category is displayed in a list of objects item. The rollover image is displayed when users place their cursors over the title image.
6. In the **Banner Image Name** field, enter the path and file name of an image to display in the category page.
7. In the **Icon Name** field, enter the path and file name of an image to use when categories are displayed next to items in a region.
8. Click **OK**.

5.3.3 Making a Category Available to a Page Group

When you create a category in a page group it is immediately available for page managers and content contributors to apply to the pages and content in that page group. You can also make shared categories available in your page group. And, if you want, you can hide categories so that page managers and contributors cannot use them.

To make a category available in a page group:

1. From the Page Groups portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default, the Page Groups portlet is located on the Build tab of the Builder page.

2. Click the **Configure** tab.
3. In the Content Type and Classification section, click the **Edit** link.
4. In the **Hidden Categories** list, select the category that you want to make available.

The **Hidden** and **Visible Categories** lists include all the categories owned by this page group and the Shared Objects page group.

5. Click the **Move Right** icon to move the selected category into the **Visible Categories** list.

The order of categories in the **Visible Categories** list determines the order used when items in a region are grouped by category.

If you want to make a sub-category visible, its parent category must also be included in the **Visible Categories** list.

6. Click **OK** to return to the Configure tab.
7. Click **Close**.

To exclude a category from a page group, select the category in the **Visible Categories** list and click the **Move Left** icon. Any items that have already been assigned to that category will still be visible when users view the page, however content contributors cannot assign the category to new items.

If you hide a shared category, it is hidden only in the current page group (not in all page groups). To hide a shared category in all page groups, you must hide it in the Shared Objects page group.

Even if you exclude all categories from a page group, if an item or page type includes the category attribute, the category list will still be displayed when adding or editing items or pages. The General category will be displayed in the list even though it is not included in the page group.

5.3.4 Deleting a Category

When you delete a category, any item or page that is assigned to that category is reassigned to the General category. If the category includes sub-categories, those sub-categories will also be deleted.

Deleting a Single Category

To delete a single category:

1. Use the Navigator to browse to the category that you want to delete.

To get to the Navigator click the Navigator link on any page. By default you can find a Navigator link on the Portal Builder page.

Tip: If the category is shared, it will be in the Shared Objects page group. See [Section 4.5, "Sharing Objects Between Page Groups"](#).

2. In the row for the category, click the **Delete** link.
3. In the confirmation page, click **Yes**.

Deleting Multiple Categories

To delete multiple categories:

1. In the Navigator, click the link for the page group that owns the categories that you want to delete.

To get to the Navigator click the Navigator link on any page. By default you can find a Navigator link on the Portal Builder page.

Tip: If the categories are shared, they will be in the Shared Objects page group. See [Section 4.5, "Sharing Objects Between Page Groups"](#).

2. Click the **Categories** link.
3. Click the **actions** link.
4. Select the check boxes next to the categories that you want to delete.

To delete all the categories in the page group, select the check box in the header row.

5. Click **Delete**.
6. In the confirmation page, click **OK**.

5.4 Working with Perspectives

Perspectives are used to further classify content by a cross-category grouping. Perspectives often answer the question "Who will be interested in this item?" A human resources page group might have perspectives such as All Employees, Design Analysts, Quality Assurance Engineers, and Sales Representatives. A travel agency page group might have perspectives such as Inexpensive Vacations, Moderately Priced Vacations, and Luxury Vacations. The purpose of perspectives is to enable users to quickly display a listing of content that is pertinent to them. For

example, if you want some users to be able to quickly access all of the content that relates to being a sales representative (such as sales reports, contact management applications, and calendaring services), you could create a perspective called Sales Representatives. When a user adds an item to the page group, they can assign it to this and other perspectives. To find all of the available content, other users can then search on this perspective to see a listing of the items that are part of it.

For information about assigning items to perspectives, see [Section 2.1.10.1, "Classifying the Content of an Item"](#). For information about searching on categories, see [Section 1.2.1.2, "Performing an Advanced Search"](#).

Unlike categories, users can choose more than one perspective for an item. For example, a sales report might belong to both the Sales Representatives and Marketing Managers perspectives.

Since perspectives have the potential to be quite large, you can also create a hierarchy of perspectives. For example, in the Sales Representatives perspective, you might want to have separate subordinate perspectives for sales representatives in the eastern division, the central division, and the western division.

When you create a perspective, a page is also created. This page is used to list all the items and pages that belong to the perspective. For example, regions can be set up to display perspectives. When users click a perspective, that perspective's page is displayed, listing all the items and pages that belong to the perspective.

The first time you create a perspective in a page group, a page template is also created and all perspective pages in the page group are based on this page template. This means that if you want to change the way perspective pages look, you just need to edit the perspective page template (rather than each individual perspective page).

Privileges: Any user with at least the Manage Classifications privileges on a page group can create and manage perspectives.

This section contains the following sub-sections:

- [Creating a Perspective](#)
- [Editing a Perspective](#)
- [Making a Perspective Available to a Page Group](#)
- [Deleting a Perspective](#)

5.4.1 Creating a Perspective

To create a perspective:

1. In the Navigator, click the link for the page group in which you want to create the perspective.

To get to the Navigator click the Navigator link on any page. By default you can find a Navigator link on the Portal Builder page.

Tip: If you create a perspective in a particular page group, that perspective is available only in that page group. If you want the perspective to be available in multiple page groups, either create it in the Shared Objects page group, or (if the perspective already exists) promote it to the Shared Objects page group. See [Section 4.5, "Sharing Objects Between Page Groups"](#).

2. Click the **Perspectives** link.
3. Next to Create New, click the **Perspective** link. Or, if you want to create the perspective under an existing perspective, click the **Create** link next to the perspective under which you want to create the new perspective.
4. In the **Name** field, enter a name for the perspective. The name can be used in a URL to directly access the perspective. Direct access URLs take the following format:

```
http://<hostname>:<portnumber>/pls/<dad>/url/page/<pagegroupname>/<perspective
vename>
```

For example:

```
http://mymachine.mycompany.com:5000/pls/portal/url/page/myportal/myperspecti
ve
http://mymachine.mycompany.com:5000/pls/portal/url/page/myportal/myperspecti
ve/mysubperspective
```

The name must be unique within the page group and the Shared Objects page group. The name is limited to 60 characters and can contain only alphanumeric characters (a-z A-Z 0-9) and the underscore character (_); spaces and special characters are not allowed.

5. In the **Display Name** field, enter a descriptive name for the perspective.

The display name can contain up to 240 characters and can contain any character, including spaces.

6. Click **Create**.
7. Click **Close**.

5.4.2 Editing a Perspective

When you create a perspective, not all of the available properties are available. You can edit a perspective after creating it to specify the rest of the available properties.

Edit the Basic Properties of a Perspective

To edit the basic properties of a perspective:

1. Use the Navigator to browse to the perspective that you want to edit.

To get to the Navigator click the Navigator link on any page. By default you can find a Navigator link on the Portal Builder page.

Tip: If the perspective is shared, it will be in the Shared Objects page group. See [Section 4.5, "Sharing Objects Between Page Groups"](#).

2. In the row for the perspective, click the **Properties** link.
3. In the **Name** field, edit the name of the perspective. The name can be used in a URL to directly access the perspective.

The name must be unique within the page group and the Shared Objects page group. The name is limited to 60 characters and can contain only alphanumeric characters (a-z A-Z 0-9) and the underscore character (_); spaces and other special characters are not allowed.

4. In the **Display Name** field, edit the descriptive name of the perspective.
The display name can contain up to 240 characters and can contain any character, including spaces.
5. In the **Description** field, enter information about the perspective that may be useful to other users. The description is displayed only when editing the category.

6. Select the **Display Icon With Items** check box if you want to display an image rather than the display name when the perspective is displayed next to items in a region (Figure 5–9):

If you select this check box you should also specify an Icon image for the perspective. If you do not specify an Icon image, the display name is displayed even if this check box is selected.

7. Click OK.

Figure 5–9 *Items Displayed with Perspective Icons*



Specifying Perspective Images

To specify perspective images:

1. Use the Navigator to browse to the perspective that you want to edit.

To get to the Navigator click the Navigator link on any page. By default you can find a Navigator link on the Portal Builder page.

Tip: If the perspective is shared, it will be in the Shared Objects page group. See [Section 4.5, "Sharing Objects Between Page Groups"](#).

2. In the row for the perspective, click the **Properties** link.
3. Click the **Image** tab.
4. In the **Title Image Name** field, enter the path and file name of an image to use when the perspective is displayed in a list of objects item.
5. In the **Rollover Image Name** field, enter the path and file name of an image to use as a rollover image when the perspective is displayed in a list of objects item. The rollover image is displayed when users place their cursors over the title image.

6. In the **Banner Image Name** field, enter the path and file name of an image to display in the perspective page.
7. In the **Icon Name** field, enter the path and file name of an image to use when perspectives are displayed next to items in a region.
8. Click **OK**.

5.4.3 Making a Perspective Available to a Page Group

When you create a perspective in a page group it is immediately available for content contributors to apply to the items in that page group. You can also make shared perspectives available in your page group. And, if you want, you can hide perspectives so that contributors cannot use them.

To make a perspective available to a page group:

1. From the Page Groups portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default, the Page Groups portlet is located on the Build tab of the Builder page.

2. Click the **Configure** tab.
3. In the Content Type and Classification section, click the **Edit** link.
4. In the **Hidden Perspectives** list, select the perspective that you want to make available.

The **Hidden** and **Visible Perspectives** lists include all the perspectives owned by this page group and the Shared Objects page group.

5. Click the **Move Right** icon to move the selected perspective into the **Visible Perspectives** list.

The order of perspectives in the **Visible Perspectives** list determines the order in which the perspectives are listed when adding or editing a page or item.

If you want to make a subperspective visible, its parent perspective must also be included in the **Visible Perspectives** list.

6. Click **OK** to return to the Configure tab.
7. Click **Close**.

To exclude a perspective from a page group, select the perspective in the **Visible Perspectives** list and click the **Move Left** icon.

If you hide a shared perspective, it is hidden only in the current page group (not in all page groups). To hide a shared perspective in all page groups, you must hide it in the Shared Objects page group.

5.4.4 Deleting a Perspective

When you delete a perspective, if the perspective includes sub-perspectives, those sub-perspectives will also be deleted.

Deleting a Single Perspective:

To delete a single perspective:

1. Use the Navigator to browse to the perspective that you want to delete.

To get to the Navigator click the Navigator link on any page. By default you can find a Navigator link on the Portal Builder page.

Tip: If the perspective is shared, it will be in the Shared Objects page group. See [Section 4.5, "Sharing Objects Between Page Groups"](#).

2. In the row for the perspective, click the **Delete** link.
3. In the confirmation page, click **Yes**.

Deleting Multiple Perspectives

To delete multiple perspectives:

1. In the Navigator, click the link for the page group that owns the perspectives that you want to delete.

To get to the Navigator click the Navigator link on any page. By default you can find a Navigator link on the Portal Builder page.

Tip: If the perspectives are shared, they will be in the Shared Objects page group. See [Section 4.5, "Sharing Objects Between Page Groups"](#).

2. Click the **Perspectives** link.
3. Click the **actions** link.

4. Select the check boxes next to the perspectives that you want to delete.
To delete all the perspectives in the page group, select the check box in the header row.
5. Click **Delete**.
6. In the confirmation page, click **OK**.

5.5 Setting Up Approvals

OracleAS Portal allows you to manage and control the publishing of content on your portal through the use of approvals. OracleAS Portal provides a special privilege for approvals, *Manage Items With Approval*. Each item added or modified by a user with this privilege must be approved before it is published to the portal. This allows you to delegate the creation of portal content without relinquishing control over what is actually displayed to your users, or compromising the quality of the content. For example, you may want each of your company's product whitepapers to be reviewed by your legal department before they are published. Using approvals, you can easily establish an approval process that includes the legal department as one of the required approvers. This ensures that each author of a whitepaper cannot publish their documents to the portal until they have been checked by the legal department.

This section contains the following sub-sections:

- [Enabling Approvals and Notifications](#)
- [Setting Up the Approval Process for a Page Group](#)
- [Monitoring Pending Approvals](#)
- [Setting Up Expiry Notifications for a Page Group](#)

5.5.1 Enabling Approvals and Notifications

To enable approvals and expose the Manage Items With Approval privilege:

1. From the Page Group portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.
By default, the Page Groups portlet is located on the Build tab of the Builder page.
2. Click the **Configure** tab.
3. In the Approvals and Notifications section, click the **Edit** link.

4. Select the **Enable Approvals and Notifications** check box.
5. Click **OK** to return to the Configure tab.
6. Click **Close**.

5.5.2 Setting Up the Approval Process for a Page Group

An approval process is a series of one or more approval routing steps. Each routing step includes one or more users and/or groups (approvers) who must approve an item before it is published. Routing to the approvers can be in serial (one at a time) or in parallel (all at once). Each step can be defined to require a response by any one approver or by all approvers.

The approval process begins when a user with the Manage Items With Approval privilege adds or modifies an item on a page. The item is automatically checked out of the portal (so that it cannot be modified), and routed through the approval process. Each approver is notified via the Notification portlet that an item requires his or her approval. Once the required number of responses is received during a step, the process continues to the next step. The approval process ends when the final step is reached and the document is approved by the last required approver. The approval process also ends when any approver rejects the item.

You can create one approval process for the entire page group, or you can enable page designers to establish approval processes that are unique to individual pages (or even to ignore the approval process for a particular page). The steps for setting up an approval process for a page group are provided below. For information about how to set up an approval process for a page, see [Section 7.9.1, "Setting Up an Approval Process for a Page"](#).

Setting Up an Approval Process for a Page Group

To set up an approval process for a page group:

1. From the Page Group portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default, the Page Group portlet is located on the Build tab of the Builder page.

2. Click the **Approval** tab.

The Approval tab is available only if approvals and notifications have been enabled for the page group. See [Section 5.5, "Setting Up Approvals"](#).

3. In the **Approvers** field in the Approval Routing List section, select one or more approvers (users or groups) for the first step of the approval routing list. Click the **Browse Users** icon to add a user, or the **Browse Groups** icon to add a group.

Use a semicolon (;) as the separator between multiple users and groups. Each step of the approval process can include both users and groups.

We recommend that approvers have at least the View privilege on the page that includes the item to be approved (so that they can view the page).

OracleAS Portal includes the following special approvers:

- **#PAGE_GROUP_MANAGER#**: Any user or group with the Manage All privilege on the page group, or the Manage All global privilege on All Page Groups.
- **#PAGE_MANAGER#**: Any user or group with the Manage privilege on the page.
- **#CONTENT_MANAGER#**: Any user or group with Manage Content or Manage privileges on the page.

By default, when you enable approvals and notifications for the page group, a single step approval process is defined at the page group level with **#CONTENT_MANAGER#** as the default approver.

4. In the **Routing Method for Approvers** radio group, select:
 - **One at a time, all must approve (Serial, All)** to send the approval notification to approvers in the step one at a time in the sequence specified. All of the approvers must respond to the approval notification.
 - **All at the same time, all must approve (Parallel, All)** to send the approval notification to approvers in the step all at the same time. All of the approvers must respond to the approval notification.
 - **All at the same time, only one must approve (Parallel, Any)** to send the approval notification to approvers in the step all at the same time. Only one of the approvers must respond to the approval notification.
5. Click **Add Step** to continue adding steps to the approval routing list.

For each step, select approvers and a routing method. Each step you add is listed in the Approval Process section. You can edit existing steps by clicking the list of users and groups, or the **Edit** icon. When you edit a step, the step details are displayed in the Approval Routing List section and the **Add Step** button changes to **Update Step**.

Because Oracle Internet Directory (OID) can include multiple directory containers that can use the same group names, the distinguished name (DN) is displayed next to any group that does not belong to the local OracleAS Portal instance.

6. Click **OK** when the approval routing list is complete.

If there are pending items for the approval process, you cannot reorder the approval routing steps. Also, you cannot edit active steps (that is, any step which is currently active within an approval process). However, you can still delete and edit any steps which are not currently active.

Enabling Page Managers to Specify Their Own Approval Processes

To enable page managers to specify their own approval processes:

1. From the Page Group portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default, the Page Groups portlet is located on the Build tab of the Builder page.

2. Click the **Configure** tab.
3. In the Approvals and Notifications section, click the **Edit** link.
4. Select the **Override the Page Group Approval Process** check box.
5. Click **OK** to return to the Configure tab.
6. Click **Close**.

Enabling this option also allows page managers to ignore the approval process completely by defining an empty approval process at the page level. This means that users with the Manage Items With Approval privilege on the page will be able to add items to the page without requiring approval.

For information about how to set up an approval process for a page, see [Section 7.9.1, "Setting Up an Approval Process for a Page"](#).

5.5.3 Monitoring Pending Approvals

The Pending Approvals Monitor portlet allows you to list pending approvals in the page groups that you administer. You can list the pending approvals by approver, date, page group, or submitter.

Figure 5–10 The Pending Approvals Monitor Portlet

The Pending Approvals Monitor portlet only lists pending approvals for other users. If you would like to view your own pending approvals, use the My Notifications portlet. For information about the My Notifications portlet or approving or rejecting items that require your approval, see [Section 2.4.2, "Approving or Rejecting Content"](#).

To monitor pending approvals:

1. Go to the page that contains your Pending Approvals Monitor portlet.
2. In the first list, choose how you want to view the pending approvals that you want to monitor. You can view pending approvals by approver, date, page group, or submitter.
3. In the second list and third lists, choose the operator and value to use to filter the list of pending approvals. For example, to list all the pending approvals waiting to be approved.
4. Click **Go**.

You can also customize or edit the defaults of the portlet to automatically list pending approvals.

Examples of the Pending Approvals Monitor Portlet

Figure 5–11 List Pending Approvals Waiting to Be Approved by SCOTT**Figure 5–12 List Pending Approvals Submitted After 11-DEC-2002**

Figure 5–13 List Pending Approvals for Items That Were Submitted by Any User Other Than SCOTT



5.5.4 Setting Up Expiry Notifications for a Page Group

Expiry notifications notify one or more recipients (users or groups) when an item in the page group is about to expire.

Setting Up Expiry Notifications for a Page Group

To set up expiry notifications for a page group:

1. From the Page Group portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default, the Page Group portlet is located on the Build tab of the Builder page.

2. Click the **Approval** tab.

The Approval tab is available only if approvals and notifications have been enabled for the page group. See [Section 5.5, "Setting Up Approvals"](#).

3. In the **Recipients** field in the Expiry Notifications section, select one or more recipients (users or groups) to notify when an item in the page group is about to expire. Click the **Browse Users** icon to add a user, or the **Browse Groups** icon to add a group.

Use a semicolon (;) as the separator between multiple users and groups. This field can include both users and groups.

Because Oracle Internet Directory (OID) can include multiple directory containers that can use the same group names, the distinguished name (DN) is displayed next to any group that does not belong to the local OracleAS Portal instance.

4. In the **Notification Time for Recipients** field, enter how long (in hours) before the item is due to expire to notify the recipients. The default is 48 hours.
5. Click **OK**.

Displaying Expiry Notifications on a Page

To display expiry notifications on a page:

1. In the Page Groups portlet, under Edit a Page, click the Browse Pages icon next to the Name field.
2. Select the page on which you want to display expiry notifications, then click Edit.
3. In the region where you want to display expiry notifications, click the **Add Portlets** icon.

If you do not see the **Add Portlets** icon, the region may be an item region, in which case, you cannot add portlets to this region.

4. Click the link for the **My Notifications** portlet.

By default, the My Notifications portlet is located under the Portal Content Tools page of the Portlet Repository. If you cannot find the My Notifications portlet under this page, use the Search field.

5. Click **OK**.
6. Next to the portlet, click the **Actions** icon.
7. Click **Edit Defaults**.
8. In the **Display Name** field, enter a different title for the portlet if required. For example, if the portlet will be used only to display expiry notifications, you might change the display name to Items About to Expire.
9. In the **Display Limit** radio group, select whether to display all notifications or limit the portlet to display only a specified number of notifications.
10. Make sure the **Show Expiry Notifications** check box is selected.

The portlet can also display approval and subscription notifications.

11. Select the **Display Notification Type Icon in Portlet** check box if you want to display an icon to illustrate whether the notification is an approval, expiry, or subscription notification. This is useful if you intend to use the portlet to display other types of notifications.
12. Select the **Display Notification Status in Portlet** check box if you want to display the status of the notification in the portlet. This informs users whether the item is about to expire or has already expired.
13. In the **Page Group Option** radio group, select whether to display expiry notifications for all page group or a specified selection of page groups.

This option is more useful for individual users who can customize the portlet to filter the list to include only those expiry notifications that they are actually interested in

14. In the **User Group Option** radio group, select whether to display expiry notifications for all user groups or a specified selection of user groups.

This option is more useful for individual users who can customize the portlet to filter the list to include only those expiry notifications that they are actually interested in.

Use a semicolon (;) as the separator between multiple groups.

Because OID can include multiple containers that can use the same group names, the distinguished name (DN) is displayed next to any group that does not belong to the local Portal instance.

15. Click **OK**.

5.6 Configuring Page Group Item Management Settings

This section contains the following sub-sections:

- [Changing the Page Group Quota](#)
- [Setting the Item Versioning Level for a Page Group](#)
- [Managing Unpublished Items](#)
- [Displaying the New and Updated Icons](#)
- [Disabling the Rich Text Editor for Internet Explorer](#)

Intended Audience

The contents of this section are intended for users with at least the Manage All privilege on a page group (that is, page group administrators).

5.6.1 Changing the Page Group Quota

You can limit the amount of space provided in your page group to store uploaded documents.

To change the page group quota:

1. From the Page Group portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default, the Page Groups portlet is located on the Build tab of the Portal Builder page.

2. In the **Total document storage quota** radio group, select **Limit to** to limit the amount of space provided to store uploaded documents.
3. In the field, enter the maximum amount of space (in megabytes) to provide for uploaded documents in the page group.

When this limit is reached, users will no longer be able to upload documents to the page group.

Select **No limit** if you do not want to impose a limit for uploaded documents.

4. Click **OK**.

5.6.2 Setting the Item Versioning Level for a Page Group

OracleAS Portal lets you select the level of item versioning you want to use for items in a page group. Item versioning determines what happens to the old version of an item when a new version is added.

Page managers can override the item versioning level for the page. However, they can only provide a higher level of item versioning than the page group, not a lower level. For example, if you set item versioning for a page group to Simple, then page managers can set the item versioning for pages within the page group to Audit, but not to None. See [Section 7.8.8, "Setting the Item Versioning Level for a Page"](#).

To set the item versioning level for a page group:

1. From the Page Group portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default, the Page Groups portlet is located on the Build tab of the Portal Builder page.

2. Click the **Items** tab.
3. In the **Item Versioning** radio group, select:
 - **None** to completely replace the item's previous version when editing an item. If you choose this option, none of the item's previous versions are retained in the database.
 - **Simple** to offer the content contributor a choice of completely replacing the item's previous version or creating a new version when editing an item. If the contributor chooses the latter option, all the item's previous versions are retained in the portal repository.

- **Audit** to always create a new version when editing an item. If you choose this option, all the item's previous versions are retained in the portal repository.
4. Click **OK**.

5.6.3 Managing Unpublished Items

You can display unpublished items in Edit mode of the pages of a page group. Unpublished items are items that have a future publish date, have expired, or have been deleted.

Only users with at least the Manage Content privilege on the page (or the Manage Item privilege on the item if item level security is enabled) can see unpublished items in Edit mode. Users with the Manage Content privilege on a page can edit, move, or restore unpublished items in that page.

Displaying Unpublished Items

To display unpublished items:

1. From the Page Group portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default, the Page Groups portlet is located on the Build tab of the Portal Builder page.

2. Click the **Items** tab.
3. Select **Display Unpublished Items In Edit Mode**.
4. Click **OK**.

Retaining Deleted Items in the Oracle Application Server Metadata Repository

To be able to continue to display deleted items, you must first choose to retain them in the Oracle Application Server Metadata Repository.

To retain deleted items in the Oracle Application Server Metadata Repository:

1. From the Page Group portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default, the Page Groups portlet is located on the Build tab of the Portal Builder page.

2. Click the **Items** tab.

3. Select **Retain Deleted Items**.
4. Click **OK**.

Permanently Removing Expired and Deleted Items

Periodically, you may want to perform a system purge to permanently remove expired and deleted items from the Oracle Application Server Metadata Repository.

To permanently remove expired and deleted items:

1. From the Page Group portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default, the Page Groups portlet is located on the Build tab of the Portal Builder page.
2. Click the **Items** tab.
3. Select **Purge Deleted Items** to remove deleted items during the system purge.
4. Select **Purge Expired Items** to remove expired items during the system purge.
5. Click **Purge**.
6. When the page refreshes, the purge is complete, and you can click **OK**.

A system purge may take a few minutes if there are a lot of expired or deleted items.

5.6.4 Displaying the New and Updated Icons

If a region includes the New Item Indicator, when a user adds a new item or portlet to that region, the **New** icon is displayed next to it to inform other users that it is new and may contain information they haven't yet seen.

If a region includes the Updated Item Indicator, when a user edits an existing item or portlet in that region, the **Updated** icon is displayed next to it, to inform other users that it has been updated and may contain new information.

You can control how long an item or portlet is considered new or recently updated by changing the display period of these icons.

Changing the New and Updated Icon Display Period

To change the New and Updated icon display period:

1. From the Page Group portlet's **Page Group** list, choose the page group with which you want to work, then click **Edit**.

By default, the Page Groups portlet is located on the Build tab of the Portal Builder page.

2. Click the **Items** tab.
3. In the **Icon Display Period** field, enter the number of days to display the **New** and **Updated** icons.

If you set the icon display period to 0, the icons will not be displayed at all.

The display period applies to both the **New** and **Updated** icons. You cannot set a different display period for the individual icons.

4. Click **OK**.

Note: When you change the icon display period, if a page has been cached, the new setting may not be immediately apparent. To make sure that the icons are correctly displayed immediately, clear the cache for the page group. To do this click the **Access** tab, then click the **Clear Cache** link.

Adding the New or Updated Item Indicator to a Region

To add the New or Updated Item Indicator to a region:

1. In the Page Groups portlet, under Edit a Page, click the **Browse Pages** icon next to the **Name** field.
2. Select the page to which you want to add the New or Updated Item Indicator, then click **Edit**.
3. In the region to which you want to add the indicator, click the **Edit Region** icon.
4. Click the **Attributes/Style** tab.
5. In the **Available Attributes** list, select:
 - **New Item Indicator** if you want to display the **New** icon in the region.
 - **Updated Item Indicator** if you want to display the **Updated** icon in the region.
6. Click the **Move Right** arrow.
7. Click **Apply**.
8. Click **Close**.

5.6.5 Disabling the Rich Text Editor for Internet Explorer

In Internet Explorer, by default, when users add or edit a text item, the area of the page where they enter the text includes a WYSIWYG editor. You can disable this feature so that users are provided with a simple text area instead.

Note: The rich text editor is not available in Netscape. In Netscape, the field for entering text is always a simple text area.

To disable the rich text editor:

1. From the Page Group portlet's **Page Group** list, choose the page group with which you want to work.

By default, the Page Groups portlet is located on the Build tab of the Portal Builder page.

2. Click the **Items** tab.
3. Clear **Enable Rich Text Editor For Internet Explorer**.
4. Click **OK**.

Creating a Look and Feel

This chapter discusses how to use templates and styles to control the appearance of pages in a page group. A *template* concerns itself with page layout; a *style* concerns itself with fonts and colors. You can apply a style to a template, and that style will be enforced on all pages that use the template.



You'll find additional information about creating a look and feel in the paper "Design Your Portal for Visual Impact," on Portal Center, <http://portalcenter.oracle.com>. Click the **Search** icon in the upper right corner of any Portal Center page.

This chapter includes the following main sections:

- [Working with Page Templates](#)
- [Working with Styles](#)
- [Working with Navigation Pages](#)

Intended Audience

The content of this chapter is intended for users who will work with templates, styles, and site navigation. Different types of privileges are required for different types of tasks:

- To work with templates, you need at least the Manage Template privilege on the page group where you will create templates.
- To work with styles, you need at least the Manage Style privilege on a page for which you will create, edit, or delete a style. And **Allow Privileged Users to Manage Page Styles** must be selected for the relevant page group. This will allow you to work with the styles that you create. To work with other styles, you must have at least the Manage Styles privilege on the relevant page group.

- Navigation pages, sub-page links regions, and navigation item types require different access privileges for different types of objects:
 - To work with navigation pages, you need at least Manage All privileges on the page group where you will create the navigation page.
 - To delete a navigation page, you need at least the Manage privilege on the navigation page.
 - To work with sub-page links regions, you need at least Manage privileges on the page where you will add the region.
 - To work with navigation item types, you need at least the Manage Content or Manage Items With Approval privilege on the page.

If a particular task requires different privileges than those listed here, those privileges will be listed before the steps of that task.

6.1 Working with Page Templates

A page template provides a way of enforcing a particular look and feel and establishing a common security model for multiple pages. As with any page, you can divide a template page into regions and tabs, apply a style, grant access privileges to pages based on the template, and add items and portlets.

Note: If item level security will be part of your security model, you should know that it can be applied to items placed on pages that are based on a page template; though it cannot be applied (successfully) to items intrinsic to the template—that is, to items that are part of the template itself—even if item level security is turned on for the template and the user has privileges on the item.

For more information on item level security, see [Section 7.8.9, "Enabling Item Level Security"](#).

This section offers information on working with templates in OracleAS Portal. It includes the following subsections:

- [Understanding Template Basics](#)
- [Locating a Page Template Through the Portal Navigator](#)
- [Creating a Page Template](#)
- [Creating a Page Template From an Existing Page](#)

- **Deleting a Page Template**

Another type of template used in OracleAS Portal is the User Interface Template. UI templates are good for standardizing the overall look and feel of data-driven portlets. By applying a UI template, you can automatically specify a page title, a title background, links to home and help pages, and background colors and images.

Note: This chapter provides information on creating a template in OracleAS Portal. Templates are very much like regular pages; therefore, for information on designing the layout of the template, applying a template to a page, or changing the template selection, see [Chapter 7, "Creating and Designing Pages"](#).

For information on selecting a default template for a page group, see [Chapter 4, "Working with Page Groups"](#).



You'll find additional information about using templates in the technical note "OracleAS Portal Best Practices: Templates." You'll find this reference on Portal Center, <http://portalcenter.oracle.com>. Click the **Search** icon in the upper right corner of any Portal Center page.

6.1.1 Understanding Template Basics

[Figure 6–1](#) and [Figure 6–2](#) show how you might set up a page template, and what a page would look like with the template applied. The template contains a banner, a corporate logo, the current user, and some commonly used links at the top; a sub-page links region below the common links; a navigation page to the left of the main content region; and a footer at the bottom that shows the location of the current page within the page group.

Figure 6–1 Sample layout for a page template

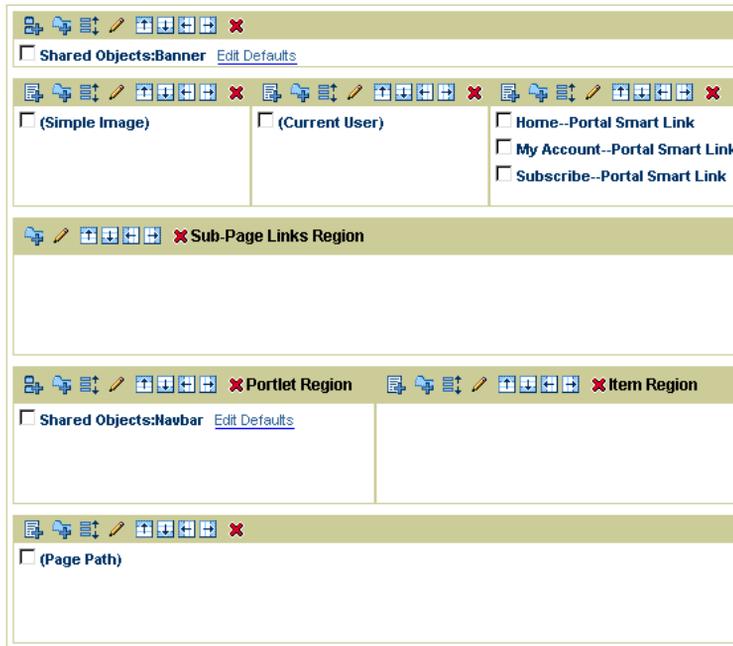


Figure 6–2 Sample page based on a template



When page designers create pages, they can choose to base those pages on a particular page template. If a page is based on a template, any changes made to the template are automatically cascaded to all pages that use it.

Keep in mind that if a page is based on a template, page designers will not be able to add any new regions to the page. The page template must contain all regions that will be required. One way to work within this restriction is to create a portlet region in your template for the display of pages that are published as portlets. Or you can provide many different regions, both item and portlet. Users may not use them all; they can choose what they need.

Note: For information on creating a portlet region, see [Section 7.5, "Designing the Layout of a Page"](#). For information on publishing a page as a portlet, see [Section 7.3.4, "Publishing a Page as a Portlet"](#).

Page templates offer some flexibility. You can set up a template so that page designers can apply a different style or set up different access privileges on pages they base on the template. You can also identify regions within the page template where content can be added. For example, in the template depicted in [Figure 6-1](#), you could set up the main content region so that page designers can add whatever content they want there, without being able to affect any other regions on the page.

6.1.2 Locating a Page Template Through the Portal Navigator

Some of the tasks you perform on existing page templates require that you locate them through the Portal Navigator. You locate pages in the Portal Navigator first through the page's parent page group, then through one of the nodes under that page group, either the Pages, Templates, or Navigation Pages node. This section describes how to get to the Templates node in the Portal Navigator.

To locate a page template through the Portal Navigator:

1. In the Portal Builder, click the **Navigator** link at the top of the page.
2. In the Portal Navigator, click the **Page Groups** tab to bring it forward.

At this point, you can enter the name of the page template in the **Find** field at the top of the tab, click **Go**, and select the page template from the list of returned results. If you're unsure of the page template name, or prefer to drill to a specific page template, continue with Step 3.

3. Click the page group that owns the page template you want to locate.

If the page template you're locating is shared across page groups, click the **Shared Objects** page group.

4. On the resulting page, click the **Templates** node.

The page templates specific to the selected page group are listed on the resulting page.

6.1.3 Creating a Page Template

Page templates enable you to enforce a standard layout and appearance for multiple pages.

To create a page template:

1. In the Portal Navigator, click the page group where you will create a page template.

Tip: If you want to use this template in more than one page group, create it in the Shared Objects page group.

2. On the resulting page, click the **Templates** node.
3. Click **Template** next to **Create New ...**
4. In the **Name** field, enter a name for the page template. The name can be used in a URL to directly access the template. Direct access URLs take the following format:

```
http://<hostname>:<portnumber>/pls/<dad>/url/page/<pagegroupname>/<templatename>
```

For example:

```
http://mymachine.mycompany.com:5000/pls/portal/url/page/myportal/mytemplate
```

The name must be unique within the page group and the Shared Objects page group, is limited to 40 characters, and can contain only alphanumeric characters (A-Z, a-z, 0-9) and the underscore (_) character. Do not use spaces or other special characters

5. In the **Display Name** field, enter a descriptive name for the page template.

This is the name by which users will identify this template (e.g., how it will be listed in the Portal Navigator). Enter up to 40 characters.

6. (Optional) In the **Description** field, enter a description for the page template.
The description, which is optional, is displayed only when you edit the page template. It does not appear to the user.
7. Select **Make available for use in this page group** to make this template available to authorized users.
This will enable other users to apply this template to the pages they create in this page group.
8. In the **Navigation Page For Banner** list, choose a navigation page to use as a banner for the page template.
The navigation page is added to a region across the top of the page. Be sure to choose a navigation page that fits appropriately. If you do not want to include a banner across the top, choose **<None>** in this list.
This list includes all the navigation pages associated with this page group and the Shared Objects page group that have been published as portlets.
9. Click **Next**.
10. Select **Enable Pages To Use Different Style** to enable page designers to use a different style in pages that are based on this template.
Conversely, to enforce a particular style on all pages based on this template, do not select this check box.
11. In the **Style** list, choose a style to apply to pages based on this template.
The Preview section provides examples of the chosen style. Select the **Portlets**, **Items**, **Tabs**, or **Other** radio button to preview how these elements will appear within the selected style.
12. Click **Next**.
13. Select **Enable Pages To Have Different Access** to enable page designers to specify different access privileges on pages that are based on this template.
Conversely, to enforce a particular set of access privileges on all pages based on this template, do not select this check box.
14. (Optional) Select **Display Page To Public Users** to enable everyone, including users who are not logged into the portal, to view pages based on this template.
15. (Optional) Select **Enable Item Level Security** to enable content contributors to set access privileges on individual items in pages that are based on this template.

If you do not select this check box, item privileges are inherited from the pages on which the items appear. For more information on item-level security, see [Section 2.3, "Protecting Your Content"](#) and [Section 7.8.9, "Enabling Item Level Security"](#).

16. To explicitly grant privileges to specific users or groups:

Note: When you set privileges on a template, those privileges apply to pages based on the template, but not on the template itself. To have privileges on a template, a user must have the Manage Templates page group privilege.

- a. In the **Grantee** field, enter the name of the user or group that should have access to pages based on this template.

Optionally, click the **Users** or **Groups** icon for lists of users or groups.

- b. In the list next to the **Grantee** field, choose a privilege level.

Note: Just because one privilege appears before another in the list does not mean that the privilege implies all other privileges below it. For more information, see [Section 7.12.4, "Page Privileges"](#).

- c. Click **Add**.

17. (Optionally) if you are revising this template, rather than creating it, click the **Clear Cache** link to remove all earlier versions of this template from the mid-tier cache.

This includes the removal of cached versions of the template for pages that are based on this template.

18. Click **Finish** to create the page template and return to the Navigator.

The new template is added under the **Templates** node In the Portal Navigator. The next step is to design the layout of the template page. For information on how to do this, see [Chapter 7, "Creating and Designing Pages"](#).

A page template page definition is always cached; however, pages based on the page template can use a different caching option. For more information, see [Section 7.10.1, "Changing How a Page Is Cached"](#).

When constructing your template, you may want to prevent users from changing what appears in one or more region. To do this, go to each relevant region and clear the **Enable Users To Include Content In This Region** check box. For example, your page might be divided into a main content region and one or more regions containing navigational elements. You want to enable users to edit or customize the content in the main content region, but disable them from editing or customizing the other regions. Disabling access to regions that contain navigational elements or fixed company branding, such as the company logo, prevents users from adversely affecting the look, feel, and content of those regions.

6.1.4 Creating a Page Template From an Existing Page

If there is an existing page that you want to use as the starting point for a new page template, you can convert the page to a template, rather than create a completely new page template.

Note, however, that only pages that are not based on a template can be converted to templates.

When you convert a page to a template, a copy of the page is created. The copy becomes the new page template. The original page still exists, and is not affected by the conversion.

When you create a template from a page, not everything in the original page is included in the template, including:

- Caching options
- Contact E-Mail
- Category
- Keywords
- Custom page attributes
- Page Images
- Approval routing
- Sub-pages

To create a page template from an existing page:

1. In the Portal Navigator, click the page group that hosts the page you want to convert to a template.
2. On the resulting page, click the **Pages** node.

3. Click **Convert to Template** next to the page you want to convert.

Tip: If you want to create a template from the page group's home page, click **Convert Root Page to Template** next to the page group.

4. In the confirmation screen, click **Yes** to create a copy of the page and convert that copy to a page template.

6.1.5 Deleting a Page Template

When you delete a page template, any pages that were based on the template are automatically detached from the template. Note, however, that deleting a template is not the only way, nor the best way to detach a page from its template. For more information on detaching from a page template, see [Section 7.4.3, "Detaching a Page from Its Template"](#).

Note: To delete a page template, you must have at least the privileges outlined in the [Intended Audience](#) section of this chapter, or Manage privileges on the page template.

To delete a page template:

1. In the Portal Navigator, click the page group that hosts the template you will delete.
2. On the resulting page, click the **Templates** node.
3. Click the **Delete** link next to the template you want to delete.

Tip: If the page template is used by more than one page group, it will be under the Shared Objects page group.

4. On the confirmation page, click **Yes**.

6.2 Working with Styles

A style controls the colors and fonts used by pages and item regions and all the tabs, portlets, and items displayed within them. If you want a page or group of

pages to use the same colors and fonts, apply a style. On the other hand, if you want to apply a consistent *layout* to a group of pages, use a page template.

Because you can apply a style to a template, you can use a template to provide a standard approach to layout, fonts, and colors.

This section discusses how to create, delete, and apply styles. It contains the following subsections:

- [Understanding Style Basics](#)
- [Creating a Style](#)
- [Style Element Properties](#)
- [Defining Styles for Items](#)
- [Defining Styles for Portlets](#)
- [Defining Styles for Pages](#)
- [Making a Style Available to Other Users](#)
- [Deleting a Style](#)

Note: For information about choosing a default style for a page group, see [Chapter 4, "Working with Page Groups"](#).

6.2.1 Understanding Style Basics

You can give all your pages a uniform appearance by applying a single style. This means that you can change the look of all your pages just by changing the style the pages use (assuming that you have the appropriate privileges to do so). If you prefer, you can apply different styles to give each page a distinct look. You can even apply different styles to the item regions within a page.

Be careful when editing a style: the changes you make affect the appearance of *all* pages and item regions that use the style. Also, if you delete a style, all pages that use the style revert to the page group default style, or the system default style if the page group default style is **<None>**.

The amount of control you have over the style of a page depends on your privileges:

- If you have the Manage or Manage Style privilege on a *page* and the **Allow Privileged Users To Manage Page Style** check box is selected for the parent page group, you can apply a different style to the page, edit existing styles to

change the colors and fonts used, or create new styles. If this check box is not selected, only portal administrators or users with the Manage All privilege on the *page group* can apply a different style to pages in the page group.

- If you have the Manage Style privilege on a *page group* and the **Allow Privileged Users To Manage Page Style** check box is selected for the page group, you can perform any action on any style in the page group.
- The portal administrator can perform any action on any style in any page group.
- If you have the Customize (Style) privilege or above on a page and the **Allow Privileged Users To Customize Page Style** check box is selected for the parent page group, you can apply a different style to your version of the page. If this check box is not selected, no user can apply a different style when customizing a member page.

6.2.2 Creating a Style

This section explains how to create a style; subsequent sections explain how to define it.

To create a style:

1. In the Portal Navigator, click the page group where you will create a style.

Tip: If you plan to use this style in more than one page group, create it in the Shared Objects page group.

2. On the resulting page, click the **Styles** node.
3. Click the **Style** link next to **Create New**
4. On the Create Style page, enter a name for the style in the **Name** field.

The name is used internally and must be unique within the page group and the Shared Objects page group. The name can contain only alphanumeric characters (A-Z, a-z, 0-9) and the underscore (_) character. Do not use spaces or other special characters.

5. In the **Display Name** field, enter a descriptive name for the style.
6. In the **Copy From** list, choose the style that most closely matches the colors and fonts that you want to use in your new style.

This list includes only those styles that you have access to, including public styles and any styles that you created previously.

7. (Optionally) Select **Make available for use in this page group** to make this style available for other users to apply to their own pages, or to use as a starting point for their own styles.

Note: If you do not see this check box, you do not have style publishing privileges. Contact your portal administrator to request these privileges.

8. Click **Create**.

[Section 6.2.3, "Style Element Properties"](#) provides tables that briefly describe the style element properties available for items, tabs, portlets, and common components.

See the following subsections for specifics on designing a style:

- [Defining Styles for Items](#)
- [Defining Styles for Portlets](#)
- [Defining Styles for Pages](#)

6.2.3 Style Element Properties

The tables in the following subsections list and describe the types of user interface elements you can affect with a style. It is divided into the following subsections:

- [Items](#)
- [Tabs](#)
- [Portlets](#)
- [Common](#)

6.2.3.1 Items

[Table 6–1](#) lists and describes style element properties that apply to items.

Table 6–1 Style element properties that apply to items

Style Element	Description
Group By Banner	Determines the color, height, and alignment of text in the banners that appear above each group of items in a page.
Group By Text	Determines the color, font face, font size, font style, and font decoration of regular text in the banners that appear above each group of items in a page.
Group By Link	Determines the color, font face, font size, font style, and font decoration of links in the banners that appear above each group of items in a page.
Default Attribute	Determines the color, font face, font size, font style, and font decoration of any style elements that do not explicitly have their own properties.
<Other Attributes>	These determine the color, font face, font size, font style, and font decoration of the attributes that appear next to items on the page. For example Category, Create Date, and so on.

6.2.3.2 Tabs

Table 6–2 lists and describes style element properties that apply to tabs.

Table 6–2 Style element properties that apply to tabs

Style Element	Description
Active Tab Color	Determines the color of the currently displayed tab (the active tab).
Active Tab Text	Determines the color, font face, font size, font style, and font decoration of the text on the currently displayed tab (the active tab).
Inactive Tab Color	Determines the color of tabs that are not currently selected (inactive tabs).
Inactive Tab Text	Determines the color, font face, font size, font style, and font decoration of the text on tabs that are not currently selected (inactive tabs).

6.2.3.3 Portlets

Table 6–3 lists and describes style element properties that apply to portlets.

Table 6–3 *Style element properties that apply to portlets*

Style Element	Description
Portlet Header Color	Determines the color of portlet headers.
Portlet Header Text	Determines the color, font face, font size, font style, and font decoration of regular text in portlet headers.
Portlet Header Link	Determines the color, font face, font size, font style, and font decoration of links in portlet headers.
Portlet Header Style	Determines whether portlet headers have square or rounded edges.
Portlet SubHeader Color	Determines the color of portlet subheaders.
Portlet SubHeader Text	Determines the color, font face, font size, font style, and font decoration of regular text in portlet subheaders.
Portlet SubHeader Link	Determines the color, font face, font size, font style, and font decoration of links in portlet subheaders.
Portlet Body Color	Determines the color of the main body of portlets.
Portlet Heading1	Determines the color, font face, font size, font style, and font decoration of text in portlets marked with the PortletHeading1 tag.
Portlet Text1	Determines the color, font face, font size, font style, and font decoration of text in portlets marked with the PortletText1 tag.
Portlet Heading2	Determines the color, font face, font size, font style, and font decoration of text in portlets marked with the PortletHeading2 tag.
Portlet Text2	Determines the color, font face, font size, font style, and font decoration of text in portlets marked with the PortletText2 tag.
Portlet Heading3	Determines the color, font face, font size, font style, and font decoration of text in portlets marked with the PortletHeading3 tag.
Portlet Text3	Determines the color, font face, font size, font style, and font decoration of text in portlets marked with the PortletText3 tag.
Portlet Heading4	Determines the color, font face, font size, font style, and font decoration of text in portlets marked with the PortletHeading4 tag.
Portlet Text4	Determines the color, font face, font size, font style, and font decoration of text in portlets marked with the PortletText4 tag.

6.2.3.4 Common

[Table 6–4](#) lists and describes style element properties that apply to item regions and pages.

Table 6–4 Style element properties common to item regions and pages

Style Element	Description
Background	Determines the color or image used for the background of the page or region.
Region Banner	Determines the color, height, and alignment of text in the banners that appear above each region in a page.
Region Banner Text	Determines the color, font face, font size, font style, and font decoration of regular text in the banners that appear above region in a page.

6.2.4 Defining Styles for Items

You can change the colors and fonts used for item attributes (for example, Display Name, Create Date, and any custom attributes) by editing the style used by the page or item region that contains them. You can have different color and font settings for each attribute.

[Figure 6–3](#) shows the same item region with different item attribute color and font settings.

Figure 6–3 Same item region with different item attribute color and font settings

[Sample Item 1](#) Date Updated: 25-OCT-2001

[Sample Item 1](#) Date Updated: 25-OCT-2001

[Sample Item 2](#) Date Updated: 25-OCT-2001

[Sample Item 2](#) Date Updated: 25-OCT-2001

To change which attributes are displayed in a region, see [Section 7.5.2.10, "Changing the Attributes Displayed in a Region"](#).

Be careful when changing a style: the changes you make affect the appearance of *all* pages and item regions that use the style.

To change item attribute colors and fonts:

1. In the Portal Navigator, click the page group that owns the style you will change.

Tip: If the style is used by more than one page group, it will be under the Shared Objects page group.

If you do not know the name of the style you want to change, edit a page or region that uses the style. When editing a page or region, if you have the appropriate privileges, you can also edit the style used by that page or region.

2. On the resulting page, click the **Styles** node.
3. Click the **Edit** link next to the style you want to change.
4. In the **Style Element Type** section, choose **Items**.
5. In the **Style Element Properties** section, choose the style element you want to change.

For a list and description of the style element properties relevant to items, see [Section 6.2.3, "Style Element Properties"](#).

Tip: You can also select the style element by clicking it in the **Preview** section.

6. To select a new color, click a color in the color palette, or enter the color's hexadecimal value in the **Color** field.

Clicking in the palette automatically populates the **Color** field with the color's hexadecimal value.
7. Choose a **Font Face**, **Font Size**, **Font Style**, and **Font Decoration**.

The <Default> font face renders the text in the default font specified by the user's browser.
8. Click **Apply**.

The **Preview** section is refreshed to show your color and font selections.
9. Edit each style element as desired.

Click **Apply** after changing each element.
10. Click **Close** to return to the Navigator.

Note: If you edit a style by editing a region that uses the style, you can change only the colors and fonts of attributes that are displayed in the region.

6.2.5 Defining Styles for Portlets

The following subsections explain how to change the colors and fonts that define the look and feel of portlets:

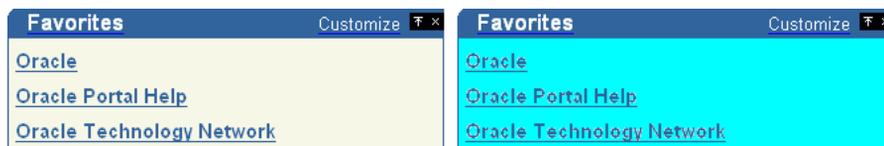
- [Changing the Portlet Body Color](#)
- [Changing Portlet Header Colors, Fonts, and Edges](#)
- [Changing Portlet Heading and Text Colors and Fonts](#)

6.2.5.1 Changing the Portlet Body Color

You can change the color of the main body of a portlet by editing the style used by the page that hosts the portlet.

Figure 6–4 shows the same portlet with different body color settings.

Figure 6–4 Same portlet with different body color settings



Be careful when changing a style: the changes you make affect the appearance of *all* pages and item regions that use the style.

Portlets created in OracleAS Portal may use their own style instead of the style of the page on which they are placed. In such cases, these portlets will use the style specified when they were created rather than any style you apply.

To change the portlet body color:

1. In the Portal Navigator, click the page group that owns the style you will change.

Tip: If the style is used by more than one page group, it will be under the Shared Objects page group.

If you do not know the name of the style you want to change, edit a page or region that uses the style. When editing a page or region, if you have the appropriate privileges, you can also edit the style used by that page or region.

2. On the resulting page, click the **Styles** node.
3. Click the **Edit** link next to the style you will change.
4. In the **Style Element Type** section, choose **Portlets**.
5. In the **Style Element Properties** section, choose **Portlet Body Color**.
For a list and description of style element properties relevant to portlets, see [Section 6.2.3, "Style Element Properties"](#).
6. Click a color in the color palette, or enter the color's hexadecimal value in the **Background Color** field, for example #CCFFFF.
Clicking in the palette automatically populates the **Background Color** field with the color's hexadecimal value. For the portlet to inherit the color from its host page background, clear the **Background Color** field.
7. Click **Apply**.
The **Preview** section is refreshed to show your color selection.
8. Click **Close** to return to the Navigator.

6.2.5.2 Changing Portlet Header Colors, Fonts, and Edges

You can change the colors and fonts used in a portlet header by editing the style that is applied to the page that hosts the portlet. You can also change the appearance of the edges of the portlet header.

[Figure 6–5](#) shows the same portlet with different header color and edge settings.

Figure 6–5 The same portlet with different settings for header color and edges



Be careful when changing a style: the changes you make affect the appearance of *all* pages and item regions that use the style.

To change the portlet header or subheader:

1. In the Portal Navigator click the page group that owns the style you will change.

Tip: If the style is used by more than one page group, it will be under the Shared Objects page group.

If you do not know the name of the style you want to change, edit a page or region that uses the style. When editing a page or region, if you have the appropriate privileges, you can also edit the style used by that page or region.

2. On the resulting page, click the **Styles** node.
3. Click the **Edit** link next to the style you will change.
4. In the **Style Element Type** section, choose **Portlets**.
5. To change the colors and fonts of the portlet headers:
 - a. In the **Style Element Properties** section, choose one of the following:
 - Portlet Header Color
 - Portlet Header Text
 - Portlet Header Link
 - Portlet SubHeader Color
 - Portlet SubHeader Text
 - Portlet SubHeader Link

You can also select a style element by clicking it in the **Preview** section.

For a list and description of style element properties relevant to portlets, see [Section 6.2.3, "Style Element Properties"](#).

- b. Click a color in the color palette, or enter the color's hexadecimal value in the **Color** field, for example #CCFFFF.

Clicking in the palette automatically populates the **Color** field with the color's hexadecimal value.

- c. Choose a **Font Face**, **Font Size**, **Font Style**, and **Font Decoration**.

The **<Default>** font face renders text in the default font specified by the user's browser.

- d. Click **Apply**.

The **Preview** section is refreshed to show your color and font selections.

6. To change the edges of the portlet header:
 - a. In the Style Element Properties section, choose **Portlet Header Style**.
 - b. Click the appropriate radio button for the edges you want:

Figure 6–6 Portlet header element with square edges (normal)



Figure 6–7 Portlet header element with rounded edges



Figure 6–8 Portlet header element with rounded left edge



Figure 6–9 Portlet header element with rounded right edge



- c. Click **Apply**.

The **Preview** section is refreshed to show your selection.

7. Edit each of the portlet header style elements as desired.
Click **Apply** after changing each element.

- Click **Close** to return to the Navigator.

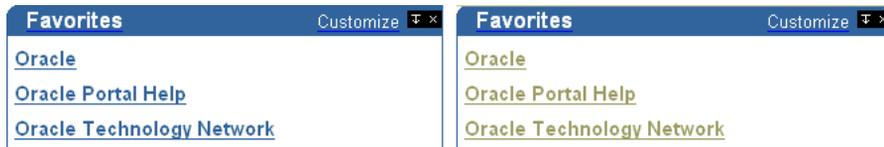
6.2.5.3 Changing Portlet Heading and Text Colors and Fonts

OracleAS Portal provides four levels of heading and text attributes for use in developing your own portlets. If you view the source of any OracleAS Portal page, you'll see that the portlets were written using Portlet Heading1 and Portlet Text1. For example, the Favorites portlet uses the Portlet Heading1 style element for favorite links.

You can change the colors and fonts of portlet headings and text by editing the style that is applied to the page that hosts the portlet.

Figure 6–10 shows the Favorites portlet with different Portlet Heading1 color settings.

Figure 6–10 Favorites portlet with different Portlet Heading1 color settings



For information about how to use these style elements in your own portlets, see the Portal Developer Kit on the Portal Center, <http://portalcenter.oracle.com>. Click the **Search** icon in the upper right corner of any Portal Center page.

Be careful when changing a style: the changes you make affect the appearance of *all* pages and item regions that use the style.

To change the portlet heading and text colors and fonts:

- In the Portal Navigator, click the page group that owns the style you will change.

Tip: If the style is used by more than one page group, it will be under the Shared Objects page group.

If you do not know the name of the style you want to change, edit a page or region that uses the style. When editing a page or region, if you have the appropriate privileges, you can also edit the style used by that page or region.

2. On the resulting page, click the **Styles** node.
3. Click the **Edit** link next to the style you will change.
4. In the **Style Element Type** section, choose **Portlets**.
5. In the **Style Element Properties** section, choose **PortletHeading n** or **PortletText n** , where n is the desired level.

You can also select the portlet heading or text style element by clicking it in the **Preview** section.

For a list and description of style element properties relevant to portlets, see [Section 6.2.3, "Style Element Properties"](#).

6. Click a color in the palette, or enter a hexadecimal value in the **Color** field, for example #FFCC00.

Clicking in the palette automatically populates the **Color** field with the color's hexadecimal value.

7. Choose a **Font Face**, **Font Size**, **Font Style**, and **Font Decoration**.

The **<Default>** font face renders the text in the default font specified by the user's browser.

8. Click **Apply**.

The **Preview** section is refreshed to show your color and font selections.

9. Edit the style elements as desired.

Click **Apply** after changing each element.

10. Click **Close** to return to the Navigator.

6.2.6 Defining Styles for Pages

You have a number of options for using styles to change the overall appearance of a page. These include:

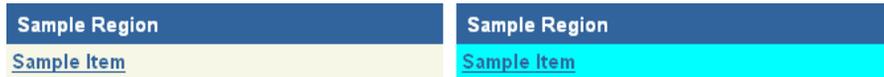
- [Changing the Page or Region Background](#)
- [Changing the Height and Alignment of Banners](#)
- [Changing Banner Colors and Fonts](#)
- [Changing Tab Colors and Fonts](#)

6.2.6.1 Changing the Page or Region Background

You can select a background color or image for a page or an item region by editing the style it uses.

Figure 6–11 shows the same item region with different background color settings.

Figure 6–11 Same item region with different background color settings



If your background image is smaller than the page or item region, it will be repeated as a pattern to cover the whole page or region.

Be careful when changing a style, because any changes you make affect the appearance of *all* pages and item regions that use the style.

To change the page or item region background:

1. In the Portal Navigator, click the page group that owns the style you will change.

Tip: If the style is used by more than one page group, it will be under the Shared Objects page group.

If you do not know the name of the style you want to change, edit a page or region that uses the style. When editing a page or region, if you have the appropriate privileges, you can also edit the style used by that page or region.

2. On the resulting page, click the **Styles** node.
3. Click the **Edit** link next to the style you will change.
4. In the **Style Element Type** section, choose **Common**.
5. In the **Style Element Properties** section, choose **Background**.

For a list and description of style element properties relevant to pages and regions, see [Section 6.2.3, "Style Element Properties"](#).

6. Click a color in the color palette, or enter a hexadecimal value in the **Background Color** field, for example #CC9999.

Clicking in the palette automatically populates the **Background Color** field with a hexadecimal value.

7. To apply an image to the background of the page or region, enter the name and location of the image you want use in the **Background Image** field, for example:

```
c:\webimages\pagebg.gif
```

If you do not know the name and location of the image, click **Browse** to locate it on your file system. The image file must be of type JPEG, GIF, or PNG.

Tip: To delete a background image, click the **Delete** icon next to the image.

8. Click **Apply**.

The **Preview** section is refreshed to show your color and image selections.

9. Click **Close** to return to the Navigator.

6.2.6.2 Changing the Height and Alignment of Banners

You can change the height and text alignment of the banners in an item region by editing the style the region uses.

Figure 6–12 shows the same item region with different height and text alignment settings on the banner.

Figure 6–12 Same item region with different settings for banner height and alignment



Be careful when changing a style, because any changes you make affect the appearance of every object that uses the style.

To change the height and text alignment of item region banners:

1. In the Portal Navigator, click the page group that hosts the style you will change.

Tip: If the style is used by more than one page group, it will be under the Shared Objects page group.

If you do not know the name of the style you want to change, edit a page or region that uses the style. When editing a page or region, if you have the appropriate privileges, you can also edit the style used by that page or region.

2. On the resulting page, click the **Styles** node.
3. Click the **Edit** link next to the style you will change.
4. To change banner height and text alignment for the item region:
 - a. In the **Style Element Type** section, choose **Common**.
 - b. In the **Style Element Properties** section, choose **Region Banner**.

For a list and description of style element properties relevant to pages and regions, see [Section 6.2.3, "Style Element Properties"](#).
5. To change the banner height and text alignment for groups of items:
 - a. In the **Style Element Type** section, choose **Items**.
 - b. In the **Style Element Properties** section, choose **Group By Banner**.

You can also select the banner style element by clicking it in the **Preview** section.
6. In the **Height** field, enter the height of the banner in pixels.

Set the banner height approximately 20-25% greater than the selected text size. For example, if text size is 8, set banner height to 10.
7. In the **Text Alignment** list, choose where you want text to appear in the banner (Left, Center, Right).
8. Click **Apply**.

The **Preview** section is refreshed to show your height and alignment selections.
9. Edit each of the banner style elements as desired.

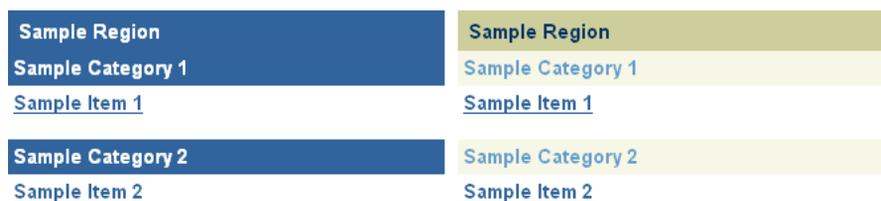
Click **Apply** after changing each element.
10. Click **Close** to return to the Navigator.

6.2.6.3 Changing Banner Colors and Fonts

You can change the colors and fonts used by the banners in an item region by editing the style used by the region.

Figure 6–13 shows the same item region with different banner and font color settings.

Figure 6–13 Same item region with different settings for banner and font color



Be careful when changing a style: the changes you make affect the appearance of every object that uses the style.

To change banner and font settings:

1. In the Portal Navigator, click the page group that hosts the style you will change.

Tip: If the style is used by more than one page group, it will be under the Shared Objects page group.

If you do not know the name of the style you want to change, edit a page or region that uses the style. When editing a page or region, if you have the appropriate privileges, you can also edit the style used by that page or region.

2. On the resulting page, click the **Styles** node.
3. Click the **Edit** link next to the style you will change.
4. To change the colors and fonts of the item region banner:
 - a. In the **Style Element Type** section, choose **Common**.
 - b. In the **Style Element Properties** section, choose either **Region Banner** or **Region Banner Text**.

For a list and description of style element properties relevant to pages and regions, see [Section 6.2.3, "Style Element Properties"](#).

5. To change the colors and fonts of the Group By banner:
 - a. In the **Style Element Type** section, choose **Items**.
 - b. In the **Style Element Properties** section, choose either **Group By Banner**, **Group By Banner Text**, or **Group By Banner Link**.

For a list and description of style element properties relevant to pages and regions, see [Section 6.2.3, "Style Element Properties"](#).

You can also select the banner style element by clicking it in the **Preview** section.

6. Click a color in the color palette, or enter a hexadecimal value in the **Color** field, for example #66FF66.

Clicking in the palette automatically populates the **Color** field with a hexadecimal value.

7. Choose a **Font Face**, **Font Size**, **Font Style**, and **Font Decoration**.

The <Default> font face renders text in the default font specified by the user's browser.

8. Click **Apply**.

The **Preview** section is refreshed to show your color and font selections.

9. Edit each of the banner style elements as desired.

Click **Apply** after changing the color or font of each element.

Note: If you are editing a style by editing a region to which the style is applied, you can only change the banner colors and fonts if the appropriate banner is displayed in the region.

10. Click **Close** to return to the Navigator.

6.2.6.4 Changing Tab Colors and Fonts

You can change tab colors and fonts by editing the style used in a region that contains the tabs.

[Figure 6–14](#) shows the same tabs with different color and font settings.

Figure 6–14 Same tabs with different color and font settings

Be careful when changing a style: the changes you make affect the appearance of *all* pages and item regions that use the style.

To change tab color and fonts:

1. In the Portal Navigator, click the page group that owns the style you will change.

Tip: If the style is used by more than one page group, it will be under the Shared Objects page group.

If you do not know the name of the style you want to change, edit a page or region that uses the style. When editing a page or region, if you have the appropriate privileges, you can also edit the style used by that page or region.

2. On the resulting page, click the **Styles** node.
3. Click the **Edit** link next to the style you will change.
4. In the **Style Element Type** section, choose **Tabs**.
5. In the **Style Element Properties** section, choose a tab style element to define.
For a list and description of style elements that are relevant to tabs, see [Section 6.2.3, "Style Element Properties"](#).
6. Click a color in the color palette, or enter a hexadecimal value in the **Color** field.
Clicking in the palette automatically populates the **Color** field with a hexadecimal value.
7. Choose a **Font Face**, **Font Size**, **Font Style**, and **Font Decoration**.
The **<Default>** font face renders text in the default font specified by the user's browser.
8. Click **Apply**.
The **Preview** section is refreshed to show your color and font selections.
9. Edit the tab style elements as desired.
Click **Apply** after changing each element.

10. Click **Close** to return to the Navigator.

6.2.7 Making a Style Available to Other Users

You can make any style you create available for use within the page group that owns it.

To make a style available within a page group:

1. In the Portal Navigator, click the page group that owns the style you want to make available.

Tip: If the style is used by more than one page group, you will find it under the Shared Objects page group.

If you do not know the name of the style you want to change, edit a page or region that uses the style. Click the **Style** link in the page toolbar at the top of the page. Then click the link to the style under the **Style Properties** section.

2. On the resulting page, click the **Styles** node.
3. Click the **Edit** link next to the style you want to make available.
4. Click the **Main** tab to bring it forward.
5. Under **Style Usage**, select **Make available for use in this page group**.
6. Click **OK** to return to the Navigator.

6.2.8 Deleting a Style

When you delete a style, all pages and item regions that used the style revert to the page group default style. If the page group default style is <None>, all pages and regions revert to the system default style.

You cannot delete the system default style.

To delete a style:

1. In the Portal Navigator, click the page group that owns the style you will delete.

Tip: If the style is used by more than one page group, it will be under the Shared Objects page group.

2. On the resulting page, click the **Styles** node.
3. Click the **Delete** link next to the style that you want to delete.
4. In the confirmation page, click **Yes**.

6.3 Working with Navigation Pages

A navigation page is a special type of page that can be included on other pages to provide a consistent set of navigational elements. A typical navigation page might contain a logo, the page title, a login link, and a link to the home page. Typically, navigation pages are used for navigation bars, page banners, and page footers.

Navigation pages are excluded from searches, preventing their useless inclusion in search result sets.

Although you can add any item or portlet to a navigation page, and even divide your navigation page into several regions, you should bear in mind that the idea is to add navigation pages to other pages. You should design your navigation pages to take up as little space as possible, so that when they are added to other pages, there is still plenty of room for the rest of the page content.

Once you create a navigation page and add all the navigational elements that you want, you can publish it as a portlet. This way other users can add it to their pages. Navigation pages that are published as portlets can be added to any portlet region on a page. For information on publishing a navigation page as a portlet, see [Section 7.3.4, "Publishing a Page as a Portlet"](#). For information on selecting a default navigation page for a page group, see [Chapter 4, "Working with Page Groups"](#).

For more information about navigation, see the technical note, "OracleAS Portal Best Practices: Navigation," on Portal Center, <http://portalcenter.oracle.com>. Click the **Search** icon in the upper right corner of any Portal Center page.

The following sections explain how to create, add, and remove a navigation page:

- [Locating a Navigation Page](#)
- [Creating a Navigation Page](#)
- [Copying a Navigation Page](#)
- [Creating Navigation With Built-In Navigation Item Types](#)
- [Deleting a Navigation Page](#)



6.3.1 Locating a Navigation Page

Some of the tasks you perform on existing navigation pages require that you locate them through the Portal Navigator. You locate pages in the Portal Navigator first through the page's parent page group, then through one of the nodes under that page group, either the Pages, Templates, or Navigation Pages node. This section describes how to get to the Navigation Pages node in the Portal Navigator.

To locate a navigation page through the Portal Navigator:

1. In the Portal Builder, click the **Navigator** link at the top of the page.
2. In the Portal Navigator, click the **Page Groups** tab to bring it forward.

At this point, you can enter the name of the navigation page in the **Find** field at the top of the tab, click **Go**, and select the navigation page from the list of returned results. If you're unsure of the navigation page name, or prefer to drill to a specific navigation page, continue with Step 3.

3. Click the page group that owns the navigation page you want to locate.

If the navigation page you're locating is shared across page groups, click the Shared Objects page group.

4. On the resulting page, click the **Navigation Pages** node.

The navigation pages specific to the selected page group are listed on the resulting page.

6.3.2 Creating a Navigation Page

Navigation pages enable you to provide a standard set of navigational elements that can be included on the pages in a page group.

To create a navigation page:

1. In the Portal Navigator, click the page group where you will create a navigation page.

Tip: If you want to be able to use this navigation page in more than one page group, create it in the Shared Objects page group.

2. On the resulting page, click the **Navigation Pages** node.
3. Click **Navigation Page** next to **Create New ...**

4. In the **Name** field, enter a name for the navigation page. The name can be used in a URL to directly access the navigation page. Direct access URLs take the following format:

```
http://<hostname>:<portnumber>/pls/<dad>/url/page/<pagegroupname>/<navigationpage>
```

For example:

```
http://mymachine.mycompany.com:5000/pls/portal/url/page/myportal/mynavigationpage
```

The name must be unique within the page group and the Shared Objects page group, is limited to 40 characters, and can contain only alphanumeric characters (A-Z, a-z, 0-9) and the underscore (_) character. Do not use spaces or other special characters

5. In the **Display Name** field, enter a descriptive name for the navigation page. This is the name that will appear in the Portal Navigator. It's limited to 40 characters.
6. In the **Copy From** list, choose a navigation page to use as a starting point for your new navigation page. This list includes all the navigation pages in this page group on which you have at least View privileges. If you want to start with a blank navigation page, choose **<None>**.
7. Select **Publish As Portlet** to make this navigation page available to other users. Eventually you will need to publish the navigation page as a portlet so that other users can add it to their pages. However, while the navigation page is under development, you might prefer to keep this check box cleared.

Note: If you do not see this check box, you do not have portlet publishing privileges. Contact your portal administrator to request these privileges.

8. Click **Create**.
9. Click the link in the confirmation message at the top of the page to edit the properties of your new navigation page.

Alternatively, you can create another navigation page, or click **Close** to return to the Navigator.

After creating your navigation page, you can add items, portlets, and regions to it. See [Chapter 7, "Creating and Designing Pages"](#). See also, [Section 6.3.4, "Creating Navigation With Built-In Navigation Item Types"](#) for information on adding built-in navigation item types.

6.3.3 Copying a Navigation Page

When you create a new navigation page, you can base it on an existing navigation page. You can do this through a creation process (see [Section 6.3.2, "Creating a Navigation Page"](#)) or through a copy process. Copy navigation pages directly in the Portal Navigator. Note that the copy you create falls under the same Navigation Pages node in the Portal Navigator that the original navigation page falls under.

To copy a navigation page:

1. In the Portal Navigator, click the page group that owns the navigation page you will copy.
2. On the resulting page, click the **Navigation Pages** node.
3. Click the **Copy** link next to the navigation page you want to copy.
4. In the **Name** field, enter an internal name for the new navigation page.

The name is used internally and for direct access URLs. The name is limited to 40 characters and can contain only alphanumeric characters (A-Z, a-z, 0-9) and the underscore (_) character. Do not use spaces or other special characters.

5. In the **Display Name** field, enter a descriptive name for the new navigation page.

This name will appear in the Portal Navigator. It is limited to 40 characters.

6. Select **Copy Access Control** if you want the new navigation page to have the same privilege settings as the original navigation page.
7. Click **OK** to create the new navigation page.

6.3.4 Creating Navigation With Built-In Navigation Item Types

OracleAS Portal comes with a number of pre-built navigation item types that simplify and speed the task of constructing site navigation. Navigation-type items are the types of items you are most likely to add to your navigation pages; however, you can include other types of items on your navigation pages, including images,

text, page links, and URLs. Additionally navigation-type items can be added to page types other than navigation pages. The next sections discuss how to add built-in navigation item types to a page, including:

- [Adding a Basic Search Box Item](#)
- [Adding a List of Objects Item](#)
- [Adding a Login/Logout Link Item](#)
- [Adding an Object Map Link Item](#)
- [Adding a Page Path Item](#)
- [Adding a Portal Smart Link Item](#)
- [Adding a Portal Smart Text Item](#)
- [Displaying Links to Sub-Pages](#)



You'll find examples of these built-in navigation item types in the technical note "OracleAS Portal Best Practices: Navigation," on Portal Center, <http://portalcenter.oracle.com>. Click the **Search** icon in the upper right corner of any Portal Center page.

6.3.4.1 Adding a Basic Search Box Item

Figure 6–15 Basic Search Box Item



Use the following steps to add a basic search box to a page ([Figure 6–15](#)). You can specify whether users of the search box can search all page groups or only the selected page group.

To add a Basic Search Box item to a page:

1. Go to the page where you will add the item.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Add Item** icon in the region in which you want to add the item.

If the **Add Item** icon does not display next to the region, the region may be a portlet region (and may contain portlets). In this case, you cannot add items to this region.

4. From the **Built-In Navigation Item Types** list, choose **Basic Search Box**.

Note: If this item type does not appear in the list, contact your page group administrator. Your administrator selects which item types to display here.

5. Click **Next**.
6. In the **Search Box Width** field, enter the width of the search box.
7. In the **Search in Page Group** field, select the page group that is searched by default.

Select **All Page Groups** for the search to include all page groups.

8. In the **Search Icon** field, enter the location of the image.

Use the first field to enter or browse for the image on your file system.

Alternatively, use the second field to enter the URL of an image or to reuse an image that has already been uploaded to the portal. To reuse an image, enter its internal name (the name OracleAS Portal assigns to it) without a path into the second field, for example, `1645.GIF`.

To obtain the internal name OracleAS Portal has assigned to an image, go to a place within your portal where the image is already in use; right click it; and select **Properties** from the right-click menu.

9. In the **Search Label** field, either:
 - Enter a label for the search box.
This field is not translated. The exact text in this field is used for all languages.
 - Or, select **Use the Default Search Label** to use the portal default search label.

This option is translated into each installed language.

10. In the **Image Alignment** field, select an image alignment, if you specified an image for the search box.

[Table 6–5](#) lists and describes image alignment options.

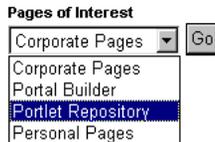
Table 6–5 *Item image alignment options*

Alignment	Description	Example
Left	Aligns the image on the left side of the page.	 Item image alignment This item demonstrates the effect of choosing the Left item image alignment option.
Right	Aligns the image on the right side of the page.	Item image alignment This item demonstrates the effect of choosing the Right item image alignment option. 
Top	Aligns the top of the image with the top of the display name.	 Item image alignment This item demonstrates the effect of choosing the Top item image alignment option.
Bottom	Aligns the bottom of the image with the baseline of the display name. Same as Baseline.	 Item image alignment This item demonstrates the effect of choosing the Bottom item image alignment option.
Absolute Middle	Aligns the middle of the image with the absolute middle of the display name.	 Item image alignment This item demonstrates the effect of choosing the Absolute Middle item image alignment option.
Absolute Bottom	Aligns the bottom of the image with the absolute bottom of the display name.	 Item image alignment This item demonstrates the effect of choosing the Absolute Bottom item image alignment option.
Text Top	Aligns the top of the image with the top (tallest text) of the display name.	 Item image alignment This item demonstrates the effect of choosing the Text Top item image alignment option.
Middle	Aligns the middle of the image with the baseline of the display name.	 Item image alignment This item demonstrates the effect of choosing the Middle item image alignment option.
Baseline	Aligns the bottom of the image with the baseline of the display name. Same as Bottom.	 Item image alignment This item demonstrates the effect of choosing the Baseline item image alignment option.
Image Above Link	Aligns the image above the display name.	 Item image alignment This item demonstrates the effect of choosing the Image Above Link item image alignment option.

11. Click **Finish**.

6.3.4.2 Adding a List of Objects Item

Figure 6–16 *List of Objects Item*



You can use lists of objects to provide a quick way for users to jump to a page of interest or to a list of all objects classified under a particular category or perspective. You can choose which pages, categories, or perspectives appear on the list, making it an easy way to provide access to some objects while hindering access to others.

You can choose whether to display this list as a drop-down list (Figure 6–16) or as a list of links (with or without associated images).

To add a List of Objects item to a page:

1. Go to the page where you will add the item.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Go to the region where you will add the item, and click the **Add Item** icon.
If the **Add Item** icon does not display with the region, the region may be a portlet region (and may contain portlets). In this case, you cannot add items to this region.
4. From the **Built-In Navigation Item Types** list, choose **List of Objects**.

Note: If this item type does not appear in the list, contact your page group administrator. Your administrator selects which item types to display here.

5. Click **Next**.
6. In the **Display Name** field, enter the display name for the item.

Users click the display name to view the item. Make the name as descriptive as possible.

7. In the **Display Type** field, select the display type for the list of objects item, such as drop-down list, links, and links/images.
8. Select **Display Objects Alphabetically** to display the objects in the list alphabetically.
9. In the **Select objects to add to your list** section, click the **Browse** icon next to an object type you will add to your list.
10. In the resulting window, click the **Return Object** link next to an object you want to add to your list.

Click the **Plus** icon to the left of an object to expand the list of available objects.

11. Repeat steps 9 and 10 until you complete your list.

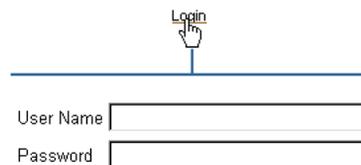
Click the **Delete** icon to remove an object from the list of objects item. Click the **Rearrange** icon to rearrange objects in the list of objects item.

Note: When an object that is included in a list of objects item is moved or promoted in OracleAS Portal, the object's reference in the list of objects is lost.

12. Click **Finish**.

6.3.4.3 Adding a Login/Logout Link Item

Figure 6–17 *Login/Logout Link Item*



Take the following steps to add login/logout links and/or icons to a page. Users can use these links/icons to log in or log out of the portal.

To add a Login/Logout Link item to a page:

1. Go to the page where you want to add the item.

For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).

2. Switch to **Edit** mode.
3. Go to the region where you will add the item, and click the **Add Item** icon.
If the **Add Item** icon does not display next to the region, the region may be a portlet region (and may contain portlets). In this case, you cannot add items to this region.
4. From the **Built-In Navigation Item Types** list, choose **Login/Logout Link**.

Note: If this item type does not appear in the list, contact your page group administrator. Your administrator selects which item types to display here.

5. Click **Next**.
6. In the **Login Link** field, either:
 - Enter text that users click to log in to the portal. This text is not translated.
 - Select **Use The Default Login Link**. This text is translated into each installed language.
7. (Optional) In the **Login Icon** field, enter the path and file name of an image to associate with the login link, or click **Browse** to locate the image.

Example: c:\webart\login.gif

The file is uploaded to the page when you click **Finish**.

8. In the **Logout Link** field, either:
 - Enter text that users click to log in to the portal. This text is not translated.
 - Select **Use The Default Logout Link**. This option is translated into each installed language.
9. (Optional) In the **Logout Icon** field, enter the path and file name of the image to associate with the logout link, or click **Browse** to locate the image.

Example: c:\webart\logout.gif

The file is uploaded to the page when you click **Finish**.

10. Next to **Select a page**, choose a page to display to users after they log in.

Choose either the page where you are adding the login/logout link, or the default home page for the portal.

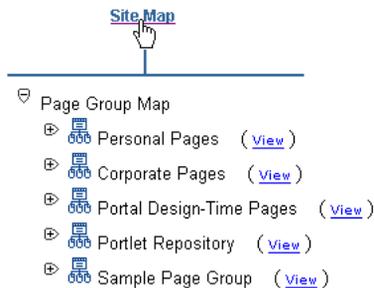
11. If you have selected an image for the login/logout link, select an image alignment.

For descriptions and examples of image alignment options, see [Table 6-5](#).

12. Click **Finish**.

6.3.4.4 Adding an Object Map Link Item

Figure 6-18 Object Map Link Item



An Object Map Link item is a link to a page that lists all page groups and sub-pages in your portal (the Object Map or site map). You can use the Object Map for rapid navigation to other locations within your portal.

To add an Object Map Link item to a page:

1. Go to the page where you will add the item.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Go to the region where you will add the Object Map Link, and click the **Add Item** icon.

If the **Add Item** icon does not display next to the region, the region may be a portlet region (and may contain portlets). In this case, you cannot add items to this region.

4. From the **Built-In Navigation Item Types** list, choose **Object Map Link**.

Note: If this item type does not appear in the list, contact your page group administrator. Your administrator selects which item types to display here.

5. Click **Next**.

6. Select an **Object Map Type**.

7. Enter a **Display Name** for the item.

Users click the display name to view the item. Make it as descriptive as possible.

8. Enter the location of an image icon.

Use the first field to enter or browse for the image on your file system. This uploads the image into the portal. Alternatively, use the second field to enter the URL of an image or to reuse an image that has already been uploaded to the portal. To reuse an image, enter its internal name (not file name) without a path into the second field, for example 1645.GIF.

To obtain the internal name OracleAS Portal has assigned to an image, go to a place within your portal where the image is already in use; right click it; and select **Properties** from the right-click menu.

9. In the **Image Alignment** field, select an image alignment, if you specified an image for the item.

For descriptions and examples of image alignment options, see [Table 6-5](#).

10. Click **Finish**.

6.3.4.5 Adding a Page Path Item

Figure 6-19 *Page Path Item*

[Sample Page Group](#): [Sample Page](#): [Sample Sub-Page A](#)



The Page Path item provides a linked trail (or *breadcrumbs*) returning up the hierarchy of pages that lead to the current sub-page. You can choose the number of levels for the path and the character that separates the path levels.

To add a Page Path item to a page:

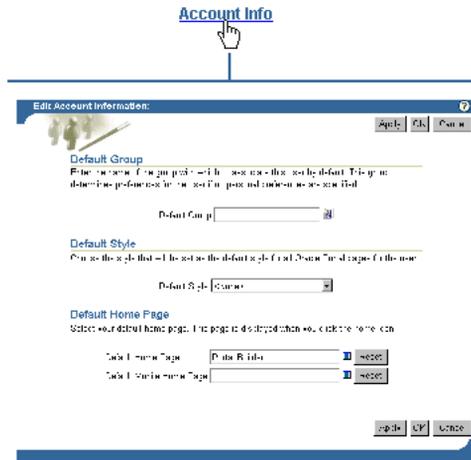
1. Go to the page where you will add the item.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Go to the region where you want to add the item, and click the **Add Item** icon.
If the **Add Item** icon does not display next to the region, the region may be a portlet region (and may contain portlets). In this case, you cannot add items to this region.
4. From the **Built-In Navigation Item Types** list, choose **Page Path**.

Note: If this item type does not appear in the list, contact your page group administrator. Your administrator selects which item types to display here.

5. Click **Next**.
6. Enter the number of **Path Levels** to display for the page path item.
Enter 0 to show all levels; enter 1 to show the current level plus one level up; enter 2 to show the current level plus two levels up; and so on. If you were to create the following:
 - A Marketing page group with a sub-page named Global Marketing
 - A sub-page under Global Marketing named European Marketing
 - A sub-page under European Marketing named EventsThen, if you added a page path item to the Events page and entered 1 for the page level, the page path item appears as:
European Marketing: Events
If you enter 2 for the page level, the page path item appears as:
Global Marketing: European Marketing: Events
7. In the **Path Element Separator** field, enter a character to separate page levels.
If you enter an asterisk (*), the page path item appears as:
Marketing* Global Marketing* European Marketing* Events
8. Click **Finish**.

6.3.4.6 Adding a Portal Smart Link Item

Figure 6–20 Portal Smart Link



Portal Smart Links provide rapid access to Account Information, Advanced Search, Contact Information, help topics, your portal home page, and the like. They're smart because they save you having to provide an address to the targeted information. You select the type of smart link you want, and Portal Smart Link dynamically constructs the URL to the targeted information.

To add a Portal Smart Link item to a page:

1. Go to the page where you will add the item.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Go to the region where you want to add the item, and click the **Add Item** icon.
If the **Add Item** icon does not display next to the region, the region may be a portlet region (and may contain portlets). In this case, you cannot add items to this region.
4. From the **Built-In Navigation Item Types** list, choose **Portal Smart Link**.
Make sure the **Built-In Navigation Item Types** radio button is selected.

Note: If this item type does not appear in the list, contact your page group administrator. Your administrator selects which item types to display here.

5. Click **Next**.

6. In the **Portal Smart Link** field, select a smart link type.

When users click the link, they'll get the following result:

- **Account Information** displays the Edit Account Information page.
- **Advanced Search** displays the Advanced Search page.
- **Builder** displays the Portal Builder page.
- **Community** displays the Portal Community main page. The community is part of the Oracle Technology Network (OTN) and includes the Portal Studio and Portal Developer Kit (PDK).
- **Contact** displays an e-mail link of the contact for the current page or page group. If there is no contact information available, this link does not display.
- **Customize** allows the user to customize the current page. This only displays if the user has the appropriate privileges.
- **Edit** allows the user to edit the current page. This only displays if the user has the appropriate privileges on the page or any of its tabs, or if item level security is enabled on the page or any of its tabs.
- **Favorites** allows the user to add the current page to the Favorites portlet.
- **Help** displays the Portal help pages.
- **Home** displays the Portal home page.
- **Mobile** displays the current user's mobile customization page. Adding this link allows users to customize their mobile portals. This link should only be added when there is a distinct mobile portal with mobile pages.
- **Navigator** displays the Portal Navigator. This only displays if the user has the appropriate privileges to view the Navigator.
- **Page Group Home** displays the page group home page.
- **Personal Page** displays the personal page of the currently logged in user.

- **Portlet Repository** displays the Portlet Repository page.
 - **Portlet Repository Refresh Status** displays the refresh status of the Portlet Repository for the administrator. This link should only be used on pages in the Portlet Repository page group.
 - **Property Sheet** displays the property sheet for the page.
 - **Refresh** refreshes the page. If caching is not set to "on" for the page definition and page content, this link does not display.
 - **Refresh Portlet Repository** allows the administrator to refresh the Portlet Repository. This link should only be used on pages in the Portlet Repository page group.
 - **Subscribe** allows users to subscribe to the page on which this smart link is displayed.
7. Enter a **Display Name** for the item, or select **Use the Default Display Name**.
Users click the display name to view the item. Be as descriptive as possible. This field is not translated. Whatever you enter here will be used for all languages.

6.3.4.7 Adding a Portal Smart Text Item

Figure 6–21 *Portal Smart Text Item (Current Date)*

April 3, 2003

Portal Smart Text enables you to place useful information on your pages without requiring that you construct the underlying code to make that information work. For example, use the Current Date Smart Text item to include the current date on a page.

To add a Portal Smart Text item to a page:

1. Go to the page where you will add the item.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Go to the region where you will add the item, and click the **Add Item** icon.

If the **Add Item** icon does not display next to the region, the region may be a portlet region (and may contain portlets). In this case, you cannot add items to this region.

4. From the **Built-In Navigation Item Types** list, choose **Portal Smart Text**.

Note: If this item type does not appear in the list, contact your page group administrator. Your administrator selects which item types to display here.

5. Click **Next**.
6. Select a **Text Type**.

Standard types include:

- **Current Date**, which lists today's date and dynamically updates each day
- **Current User**, which lists the user who logged in to this portal instance
- **Current Page**, which lists the display name of the current page

7. Click **Finish**.

6.3.4.8 Displaying Links to Sub-Pages

Figure 6–22 Sub-Page Links Region



OracleAS Portal offers a fast way to include a list of links to a current page's sub-pages through Sub-Page Links regions. Add one of these regions to a standard or navigation page, and it automatically populates with links to the current page's sub-pages. You can configure the region to show links to one or two levels of sub-pages. For example, if you place the region on a navigation page, configure it to show one level of sub-pages, publish the navigation page as a portlet, then place the navigation page portlet on a standard page in your page group, the Sub-Page Links region in the navigation page portlet will display links to the first level of sub-pages of the standard page on which it is placed.

This section describes how to add a Sub-Page Links region to a page. For information on configuring a Sub-Page Links region, see [Section 7.5.2, "Configuring Region Display Options"](#). You can use page properties to specify which sub-pages are available for display and which are not. For more information, see [Section 7.8.1, "Defining the Display of Sub-Page Links"](#).

To add a Sub-Page Links region to a page:

1. Go to the page where you will add a Sub-Page Links region.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Add a region where you will display sub-page links, or go to the existing region you will use for this purpose.
For information on how to add a region, see [Section 7.5.1.1, "Adding a Region to a Page"](#).
4. Click the region's **Edit** icon.
5. Select the **Sub-Page Links** radio button under the **Region Type** section.
6. Click **OK** to save your changes and return to the page.

Some of the seeded banners provided with OracleAS Portal contain sub-page links. These banners are navigation pages that have been published as portlets. If you prefer to have a sub-page links region on a page in lieu of displaying such links in your banner, you must edit the navigation page to remove its sub-page links region.

6.3.5 Deleting a Navigation Page

Delete a navigation page when it is no longer useful. If one or more pages are using a deleted navigation page, the navigation page will no longer appear on the pages.

To delete a navigation page:

1. In the Portal Navigator, click the page group that owns the navigation page you will delete.
If the navigation page is used by more than one page group, it will be under the Shared Objects page group.
2. On the resulting page, click the **Navigation Pages** node.
3. Click the **Delete** link next to the relevant navigation page.
4. On the confirmation page, click **Yes**.

Creating and Designing Pages

This chapter explains how to create different types of pages, including how to create page layouts, set up tabs, configure display options, add content, and perform other related tasks. It includes the following main sections:

- [Creating Pages](#)
- [Navigating to Pages](#)
- [Performing Actions On Pages](#)
- [Defining a Page's Appearance](#)
- [Designing the Layout of a Page](#)
- [Adding Content](#)
- [Adding Search Functionality](#)
- [Defining Information About Pages](#)
- [Setting Up an Approval Chain](#)
- [Improving Page Performance](#)
- [Using Parameters and Events](#)
- [Protecting Your Content](#)

Intended Audience

The content of this chapter is intended for users with at least the Manage privilege on the pages you will work with. If a particular task requires or can be performed under different privileges, those privileges will be listed before the steps of that task. For more information on page privileges, see [Section 7.12.4, "Page Privileges"](#).

7.1 Creating Pages

A page is a container for your content. There are five base page types. This section explains how to create these types of pages. It includes the following subsections:

- [Creating a Standard Page](#)

Standard pages display portlets, items, tabs, and sub-page links.

- [Creating a Sub-Page](#)

Sub-pages enable you to create additional levels in your page hierarchy.

- [Creating a URL Page](#)

URL pages display the contents of a particular URL.

- [Creating a PL/SQL Page](#)

PL/SQL pages display the results of executing PL/SQL code.

- [Creating a JavaServer Page \(JSP\)](#)

JSP pages display the results of executing a JavaServer Page (JSP).

- [Creating Pages for Mobile Devices](#)

Mobile pages display portlets and items. Mobile pages provide a way to design pages specifically for displaying in mobile devices, such as cell phones.

Standard pages can also be displayed in mobile devices, however the standard page design environment is more suited to creating pages for larger display devices, such as PC monitors.

You can create mobile pages only if the **Enable Mobile Page Design** global setting is enabled. Typically, global settings are controlled by the portal administrator. They're located in the Settings portlet on the Administer tab of the Portal Builder.

7.1.1 Creating a Standard Page

Standard pages display portlets, items, tabs, and sub-page links.

Note: To create a standard page, you must have the Create global privilege on All Pages, and at least the Manage privilege on the parent page of the new page.

To create a standard page:

1. In the Portal Builder, click the **Build** tab to bring it forward.

Default installations of OracleAS Portal include the Page Groups portlet on the **Build** tab of the Portal Builder. If your installation does not, see your portal administrator to for this portlet's location.

2. Go to the Page Groups portlet, and select the page group that will own the new page from the **Page Group** drop-down list.
3. Click **Create a Page**.
4. On the resulting page, choose **Standard** from the **Page Type** list.

If Standard is not included in this list, the Standard page type has been excluded from the page group. If you have the required privileges, you can click the **Configure** link next to the **Page Type** list to configure the page group to include standard pages. If you do not have the required privileges, see your page group administrator.

5. In the **Name** field, enter a name for the page. The name can be used in a URL to directly access the page. Direct access URLs take the following format:

```
http://<hostname>:<portnumber>/pls/<dad>/url/page/<pagegroupname>/<pagename>
```

For example:

```
http://mymachine.mycompany.com:5000/pls/portal/url/page/myportal/mypage  
http://mymachine.mycompany.com:5000/pls/portal/url/page/myportal/mypage/mysu  
bpage
```

The name is limited to 40 characters, and can contain any alphanumeric character (A-Z, a-z, 0-9), spaces, and the following special characters:

```
- _ . ! , ; = + ~ @ ( ) [ ] { } ^ $
```

6. In the **Display Name** field, enter a descriptive name for the page.

The display name is limited to 40 characters. This is the name that is displayed in the Portal Navigator. It is not required that you enter a display name. If you leave this field blank, Portal assigns a default display name.

7. (Optional) In the **Description** field, enter a description for the page.

The description is displayed only when you edit the page. It does not appear to the user.

The description must not exceed 2000 characters.

8. From the **Navigation Page For Banner** list, choose a navigation page to use as a banner for the page.

The navigation page is added as a portlet to a region across the top of the page. Choose a navigation page that fits appropriately. If you do not want to include a banner across the top of the page, choose **<None>** from this list.

This list includes all the navigation pages in this page group and the Shared Objects page group that have been published as portlets.

If you choose a page template in step 11, the navigation page you choose in this list will be ignored.

Note: For more information about navigation, see [Section 6.3, "Working with Navigation Pages"](#).

9. Select a page caching option.

Caching at the system level places a single copy of the page's structure (or structure and content) in the system cache for all users. Consequently, all page customization options are disabled.

Note: For more information about page caching, see [Section 7.10.3, "Page Caching Options"](#).

10. Click **Next**.

11. (Optional) From the **Page Template** list, choose a page template to apply to the page.

Page templates allow you to standardize the appearance of your pages through the application of a predetermined structure and a pre-selected style. You can also use a template to include standard images and other content, such as a corporate logo. If you do not want to base your page on a template, choose **<None>** from this list.

The **Preview** section provides an example of the structure and content of the page template.

Note: You cannot add new regions to pages based on templates. You should apply a page template to a page only if you are sure that the page template provides the exact layout that you want to use for your page.

For more information about templates, see [Section 6.1, "Working with Page Templates"](#).

12. Click Next.

If you do not see the **Next** button, you have based your page on a page template that does not allow pages to use their own style and access control. Choose a different page template, or go to step 18.

13. (Optional) From the Style list, choose a style to apply to this page.

The **Preview** section provides an example of how portlets, items, tabs, and common style elements will appear in the chosen style.

If you have based your page on a page template that does not allow pages to use their own style, you will not see this step.

Note: For more information about styles, see [Section 6.2, "Working with Styles"](#).

14. Click Next.

If you do not see the **Next** button, you have based your page on a page template that does not allow pages to use their own access control. Go back and choose a different page template, or go to step 18.

15. (Optional) Select Display Page To Public Users if you want everyone, including users who are not logged into the portal, to be able to view the page.

16. (Optional) Select Enable Item Level Security if you want content contributors to be able to specify access privileges on individual items in this page.

If you do not select this check box, item privileges are inherited from the pages on which the items appear. For more information, see [Section 7.8.9.1, "What Is Item Level Security?"](#)

17. (Optional) To explicitly grant access to specific users or groups:

- a. In the **Grantee** field, enter the name of the user or group that you want to allow to access this page.

Optionally, click either the **Users** or **Groups** icon and select from the list provided.

Note: OracleAS Portal uses the Oracle Internet Directory (OID) for identity management, serving as the repository for users and groups. In OID, groups are uniquely identified by their distinguished name (DN). Each group has a unique DN, though many groups can share a common name, in the same way that two people can share a common name, yet have completely different lineage (i.e., John Smith and John Doe). When working within the portal, groups created from within that portal are displayed simply with their common names. However, when the portal references a group from some other location in the OID—such as a group from some other portal associated with the same Identity Management Infrastructure—the DN of the group is displayed to distinguish it from the portal’s locally defined groups.

- b. Choose an access privilege level from the list.

Note: The order of the privileges in the list is not based on any hierarchy of privileges. For more information, see [Section 7.12.4, "Page Privileges"](#).

- c. Click **Add**.

18. Click **Finish** to create the page and display it in **Edit** mode.

7.1.2 Creating a Sub-Page

Any page you add to a page group is a sub-page to the page group’s root page (the root is the page that is created when you create a page group). You may want to add to your hierarchy of sub-pages to create additional levels. For example, let’s say you have the page group *Departments*, under which you create *Orders*, *Fulfillment*, and *Accounts* pages. Under the *Accounts* page, you create three sub-pages: *Regions*, *Forms*, and *Tips*. This section explains how to create a sub-page to a standard page.

To create a sub-page to a standard page:

1. Go to the page for which you will create sub-pages.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Create: Sub-Pages** link in the toolbar at the top of the page.
4. Follow the steps for creating a page as described in [Section 7.1.1, "Creating a Standard Page"](#).

You can create other types of sub-pages beneath a standard page. For more information, see the other sub-sections in [Section 7.1, "Creating Pages"](#).

7.1.3 Creating a URL Page

URL pages display the content of a particular URL. For example, when a user clicks a link to a URL page in OracleAS Portal, the resulting page is the target URL. URL pages allow you to transparently include information from other sites in your page group.

Note: To create a URL page, you must have the Create global privilege on All Pages, and at least the Manage privilege on the parent page of the new page.

To create a URL page:

1. In OracleAS Portal, click the **Build** tab to bring it forward.
2. Go to the Page Groups portlet, and, from the **Page Group** drop-down list, select the page group that will own the new page.
3. Click **Create a Page**.
4. In the **Page Type** list, choose **URL**.

If URL is not included in this list, the URL page type has been excluded from the page group. If you have the required privileges, you can click the **Configure** link next to the Page Type list, and configure the page group to include this type.

Note: For more information on configuring page types, see [Chapter 4, "Working with Page Groups"](#).

5. In the **Name** field, enter a name for the page. The name can be used in a URL to directly access the page. Direct access URLs take the following format:

`http://<hostname>:<portnumber>/pls/<dad>/url/page/<pagegroupname>/<pagename>`

For example:

`http://mymachine.mycompany.com:5000/pls/portal/url/page/myportal/mypage`
`http://mymachine.mycompany.com:5000/pls/portal/url/page/myportal/mypage/mysubpage`

The name is limited to 40 characters, and can contain any alphanumeric character (A-Z, a-z, 0-9), spaces, and the following special characters:

`- _ . ! , ; = + ~ @ () [] { } ^ $`

6. In the **Display Name** field, enter a descriptive name for the page.
The display name is limited to 40 characters. This is the name that is displayed in the Portal Navigator.
7. (Optional) In the **Description** field, enter a description for the page.
The description is displayed only when you edit the page. It does not appear to the user.
The description must not exceed 2000 characters.
8. Click **Next**.
9. In the **URL** field, enter the URL of the Web page to show when the page is displayed.
10. Click **Next**.
11. (Optional) Select **Display Page To Public Users** if you want everyone, including users who are not logged into the portal, to be able to view the page.
12. (Optional) To explicitly grant access privileges to specific users or groups:
 - a. In the **Grantee** field, enter the name of the user or group who will access this page.
Optionally, click the **Users** or **Groups** icon, and select from the list provided.

Note: OracleAS Portal uses the Oracle Internet Directory (OID) for identity management, serving as the repository for users and groups. In OID, groups are uniquely identified by their distinguished name (DN). Each group has a unique DN, though many groups can share a common name, in the same way that two people can share a common name, yet have completely different lineage (i.e., John Smith and John Doe). When working within the portal, groups created from within that portal are displayed simply with their common names. However, when the portal references a group from some other location in the OID—such as a group from some other portal associated with the same Identity Management Infrastructure—the DN of the group is displayed to distinguish it from the portal’s locally defined groups.

- b. In the list, choose a privilege level.

Note: The order of the privileges in the list is not based on any hierarchy of privileges. For more information, see [Section 7.12.4, "Page Privileges"](#).

The following page privileges do not apply to URL pages: Manage Items With Approval, Manage Style, Customize Portlets, Customization.

- c. Click **Add**.
13. Click **Finish** to create the page.

7.1.4 Creating a PL/SQL Page

PL/SQL pages display the results of executing a piece of PL/SQL code. PL/SQL pages allow you to include data from your database in your page group.

Note: To create a page, you must have the Create global privilege on All Pages, and at least the Manage privilege on the parent page of the new page.

To create a PL/SQL page:

1. In OracleAS Portal, click the **Build** tab to bring it forward.
2. Go to the Page Groups portlet, and select the page group that will own the new page from the **Page Group** drop-down list.
3. Click **Create a Page**.
4. In the **Page Type** list, choose **PL/SQL**.

If PL/SQL is not included in this list, the PL/SQL page type has been excluded from the page group. If you have the required privileges, you can click the **Configure** link next to the Page Type list, and configure the page group to include this type.

Note: For more information on configuring page types, see [Chapter 4, "Working with Page Groups"](#).

5. In the **Name** field, enter a name for the page. The name can be used in a URL to directly access the page. Direct access URLs take the following format:

`http://<hostname>:<portnumber>/pls/<dad>/url/page/<pagegroupname>/<pagename>`

For example:

`http://mymachine.mycompany.com:5000/pls/portal/url/page/myportal/mypage`
`http://mymachine.mycompany.com:5000/pls/portal/url/page/myportal/mypage/mysubpage`

The name is limited to 40 characters, and can contain any alphanumeric character (A-Z, a-z, 0-9), spaces, and the following special characters:

`- _ . ! , ; = + ~ @ () [] { } ^ $`

6. In the **Display Name** field, enter a descriptive name for the page.
The display name is limited to 40 characters. This is the name that is displayed in the Portal Navigator.
7. (Optional) In the **Description** field, enter a description for the page.
The description is displayed only when you edit the page. It does not appear to the user.
The description must not exceed 2000 characters.
8. Click **Next**.

-
9. In the **PL/SQL Code** field, enter (or paste) the PL/SQL code you want to execute when the page is displayed.

You do not need to include BEGIN and END statements, but you must include the final semicolon (;).

10. In the **PL/SQL Execute Options** section, select either:
 - **Public** to execute the PL/SQL code as the PUBLIC database schema.
 - **Creator** to execute the PL/SQL code as the database schema mapped to your user account.
 - **Schema** to execute the PL/SQL code as a specific database schema. Enter the database schema name, or click the **Browse** icon and select a schema from the list provided. This option is available only if you have DBA privileges.
11. Click **Next**.
12. (Optional) Select **Display Page To Public Users** if you want everyone, including users who are not logged into the portal, to be able to view the page.
13. (Optional) To explicitly grant privileges to specific users or groups:
 - a. In the **Grantee** field, enter the name of the user or group that you want to allow to access this page.

Optionally, click the **Users** or **Groups** icon, and select from the list provided.

Note: OracleAS Portal uses the Oracle Internet Directory (OID) for identity management, serving as the repository for users and groups. In OID, groups are uniquely identified by their distinguished name (DN). Each group has a unique DN, though many groups can share a common name, in the same way that two people can share a common name, yet have completely different lineage (i.e., John Smith and John Doe). When working within the portal, groups created from within that portal are displayed simply with their common names. However, when the portal references a group from some other location in the OID—such as a group from some other portal associated with the same Identity Management Infrastructure—the DN of the group is displayed to distinguish it from the portal’s locally defined groups.

- b. In the list, choose a privilege level.

Note: The order of the privileges in the list is not based on any hierarchy of privileges. For more information, see [Section 7.12.4, "Page Privileges"](#).

The following page privileges do not apply to PL/SQL pages: Manage Items With Approval, Manage Style, Customize Portlets, Customization (Style).

- c. Click **Add**.

14. Click **Finish** to create the page.

7.1.5 Creating a JavaServer Page (JSP)

JSP pages display the results of executing a JavaServer Page (JSP). You can create JSPs in OracleAS Portal, provided the parent page group is configured to allow for the creation of JSPs, and the JSP page type is included in the Page Group's list of available page types. For more information, see [Section 4.4.6, "Enabling JavaServer Page Access"](#) and [Chapter 5.2.2.3, "Making a Page Type Available to a Page Group"](#).

You can create a JavaServer Page two ways through the OracleAS Portal user interface:

- [Creating a JSP Through the Page Creation Wizard](#)
- [Creating a JSP By Copying Another Page](#)



You can also create JSPs for use in OracleAS Portal outside the Portal user interface, for example with Oracle9i JDeveloper. For more information, see the Oracle9i JDeveloper page on the Oracle Technology Network, <http://otn.oracle.com/products/jdev/content.html>.

7.1.5.1 Creating a JSP Through the Page Creation Wizard

To create a JSP through the Page Creation Wizard:

1. In the Portal Builder, click the **Build** tab to bring it forward.
2. Go to the Page Groups portlet, and select the page group that will own the new page from the **Page Group** drop-down list.
3. Click the **Create a Page** link.

4. From the **Page Type** list, select **JSP**.
5. In the **Name** field, enter a name for the page. The name can be used in a URL to directly access the page. Direct access URLs take the following format:

`http://<hostname>:<portnumber>/pls/<dad>/url/page/<pagegroupname>/<pagename>`

For example:

`http://mymachine.mycompany.com:5000/pls/portal/url/page/myportal/mypage`
`http://mymachine.mycompany.com:5000/pls/portal/url/page/myportal/mypage/mysubpage`

The name is limited to 40 characters, and can contain any alphanumeric character (A-Z, a-z, 0-9), spaces, and the following special characters:

`- _ . ! , ; = + ~ @ () [] { } ^ $`

6. In the **Display Name** field, enter a descriptive name for the page.
The display name is limited to 40 characters. This is the name that is displayed in the Portal Navigator.
7. (Optional) In the **Description** field, enter a description for the page.
The description is displayed only when you edit the page. It does not appear to the user.
The description must not exceed 2000 characters.
8. Select a caching option for the JSP.
For more information, see [Section 7.10.3, "Page Caching Options"](#)
9. Click **Next**.
10. In the **File Name** field under **JSP Source**, enter the path and file name of the JSP, JAR, or WAR file to upload for the page.
Optionally, click **Browse** to locate and select the file.
11. In the **Initial JSP for JAR or WAR Files** section, enter the name of the JSP file to execute when the user first views the page in the **Initial JSP File** field.
Do this only if you uploaded a JAR or WAR file in step 8.
12. Click **Next**.
13. Select **Display Page to Public Users** to allow all users to view this page, even users who are not logged on.

14. In the **Grantee** field under **Grant Access**, enter the name of the users or groups who should have access to this page.
Optionally, click the **Users** or **Groups** icon and select from the list provided.
15. From the list next to the **Grantee** field, select an access level for the selected user or group.
16. Click **Add**.
17. Repeat steps 14 through 16 until all relevant users and groups have been granted access.
18. Click **Finish**.

7.1.5.2 Creating a JSP By Copying Another Page

To create a JSP by copying an existing page:

1. In the Portal Navigator, click the **Page Groups** tab to bring it forward.
To get to the Portal Navigator, click the **Navigator** link at the top of the Portal Builder. If the link does not display, ask your page group or portal administrator for access to this link.
2. Click the page group that owns the page you will copy as a JSP.
3. On the resulting page, click the **Pages** node.
4. Click the **Copy as JSP** link next to the page you will copy.
5. Enter a **Name** and a **Display Name** for the JSP.
The name you enter into the **Name** field is used by OracleAS Portal in the creation of direct access URLs. The **Display Name** becomes the title of the JSP.
6. Under **Content Options**, choose from:
 - **Use original page's portlet instances.** Select this option to copy the customizations that were made to portlets on the original page to portlets on the JSP.
 - **Create externally published portlets.** Select this option to create an externally published portlet for each portlet on the original page, and then use the externally published portlets on the JSP. If you select this option, any customizations made to the portlets on the original page will not affect the portlets on the JSP.
7. Click **OK**.

7.1.6 Creating Pages for Mobile Devices

Through OracleAS Portal, you can create portal pages specifically for mobile devices, such as cell phones. Note that standard pages can also be viewed on mobile devices. However, to provide page designers with more control over the appearance of pages displayed on mobile devices, Portal provides the means of setting up portal pages specifically for display on the small screens available on such devices.

This section describes Portal's mobile support and explains how to set up and manage mobile pages through the Portal user interface. It includes the following subsections:

- [Mobile Support in OracleAS Portal](#)
- [Creating a Mobile Page](#)
- [Adding Content to a Mobile Page](#)
- [OracleAS Portal and MobileXML](#)



Before you can create a mobile page, your portal administrator must enable their creation via the **Global Settings** link in the Services portlet. For information on setting up OracleAS Portal for mobile support, see the *OracleAS Portal Configuration Guide*. You'll find this guide on Portal Center, <http://portalcenter.oracle.com>. Click the **Search** icon in the upper right corner of any Portal Center page.

7.1.6.1 Mobile Support in OracleAS Portal

What Is a Mobile Page?

A mobile page is a page that is specifically designed for display on a mobile device. Mobile pages are presented in a hierarchical tree structure. The structure is defined by levels. Any level, including the top level, can contain any number of portlets, items, and levels. This provides the flexibility to represent a large amount of content, yet limit the list displayed at any one time to fit the limited display sizes of most mobile devices. Mobile pages give page designers complete control of how a page will look on a mobile device.

When creating a mobile page, the page designer can choose to start with a blank page or to base the page on an existing standard page. If the page designer chooses to base the mobile page on an existing standard page, the mobile-enabled portlets on the standard page are shared with the mobile page. This means that any customizations made to the portlets on the standard page will also apply to the portlets on the mobile page.

Note: Only the portlets that are on the standard page at the time of the mobile page's creation are shared. If portlets are added to the standard page after the mobile page has been created, these new portlets are not shared. The page designer can explicitly share the new portlets and add the shared portlet instances to the mobile page. For more information, see [Section 7.6.2.5, "Sharing a Portlet Across Multiple Pages"](#).

Things to Consider Before You Create a Mobile Page

Some things to consider before you create your pages:

- If you use standard pages exclusively, they may not display optimally on the small screens available on mobile devices. On the other hand, if you decide to create a standard and a mobile version of pages, you'll end up maintaining two sets of portal pages.
- If you anticipate heavy traffic on your mobile pages, it will probably be worth it to risk the overhead and create two sets of pages. On the other hand, if only a few users will access your portal through mobile devices, or if mobile access will be infrequent, it's probably not worth the overhead.
- If you anticipate any mobile access, be sure to test how your standard pages will look on mobile devices. Go to your standard page; switch to Edit mode; and click the **Mobile: Preview** link in the toolbar at the top of the page.

Moving from a Standard to a Mobile Page

If the portal administrator has enabled the mobile access global setting, any standard page can be displayed in a mobile device. The structure of a standard page is flattened into a list of portlets and items from which users can make selections. Any tabs on the page are converted into levels, which users can drill down into to view more content. When a standard page is requested by a mobile device, only those portlets and items that are mobile-enabled are displayed. Mobile-enabled portlets are those portlets capable of handling MobileXML. It's easy to know which portlets are mobile-enabled by noting which portlets are available in the portlet repository when you add a portlet to a mobile page. Mobile-enabled items include any items based on `BaseURL`, `BasePageLink`, and `BaseSubPageDisplay`.

When editing a standard page, page designers can preview how the page will look in a mobile device by clicking the **Mobile: Preview** link in the toolbar at the top of the page.



7.1.6.2 Creating a Mobile Page

Before you can create a mobile page, your portal administrator must enable their creation via the **Global Settings** link in the Services portlet. For information on setting up OracleAS Portal for mobile support, see the *Oracle Application Server Portal Configuration Guide*. You'll find this guide on Portal Center, <http://portalcenter.oracle.com>. Click the **Search** icon in the upper right corner of any Portal Center page.

Mobile pages provide a way to design pages to display portlets and items specifically within mobile devices, such as cell phones. Standard pages can also be displayed in mobile devices; however, the standard page design environment is more suited to creating pages for larger display devices, such as computer monitors.

If you base your mobile page on an existing standard page, the layout of the existing page is flattened so that it is more suitable for display on mobile devices:

- The standard page is examined and its regions are arranged in a logical order.
- The mobile content in these regions is copied over into the single region of the new mobile page. Non-mobile content is not copied over to the new mobile page. Non-mobile content includes any portlets that are not mobile-enabled, and any item types that are not based on the BaseURL, BasePageLink, and BaseSubPageDisplay item types.
- The portlet customizations on the mobile portlets are shared between the standard page and the mobile page. This means that any customizations made to either page affect the other page. For example, if a user customizes a stock portlet on a page with a specific portfolio, and that page was used as the initial content for a mobile page, then the user will see the same customizations on the mobile page. Even though the portlets are shared, they will not be listed in the Portlet Repository.
- Any tabs on the standard page are converted into levels on the new mobile page.
- The access control settings on the standard page are copied to the new mobile page. You can edit the mobile page to change these settings later. Privileges that do not apply to mobile pages are converted as follows:
 - Manage Items With Approval becomes Manage Content
 - Manage Style becomes Customize Portlets (Full)
 - Customization (Style) becomes View

Note: To create a page, you must have the Create global privilege on All Pages, and at least the Manage privilege on the parent page of the new page.

To create a mobile page:

1. In OracleAS Portal, click the **Build** tab to bring it forward.
2. Go to the Page Groups portlet, and select a page group that will own the new page from the **Page Group** drop-down list.
3. Click **Create a Page**.
4. In the **Page Type** list, choose **Mobile**.

If **Mobile** is not included in this list, the mobile page design global setting is not enabled, or the Mobile page type has not been included in the page group. If you have administrative privileges, you can add this type to the list of available types by clicking the **Configure** link next to the **Page Type** field. Use this to configure the page group that owns this page to include the Mobile page type.

5. In the **Name** field, enter a name for the page. The name can be used in a URL to directly access the page. Direct access URLs take the following format:

`http://<hostname>:<portnumber>/pls/<dad>/url/page/<pagegroupname>/<pagename>`

For example:

`http://mymachine.mycompany.com:5000/pls/portal/url/page/myportal/mypage`
`http://mymachine.mycompany.com:5000/pls/portal/url/page/myportal/mypage/mysubpage`

The name is limited to 40 characters, and can contain any alphanumeric character (A-Z, a-z, 0-9), spaces, and the following special characters:

`- _ . ! , ; = + ~ @ () [] { } ^ $`

6. In the **Display Name** field, enter a descriptive name for the page.
The display name is limited to 40 characters. This is the name that is displayed in the Portal Navigator.
7. (Optional) In the **Description** field, enter a description for the page.
The description is displayed only when you edit the page. It does not appear to the user.

The description can contain up to 2000 characters.

8. Select a page caching option.

Caching at the system level places a single copy of the page's structure (or structure and content) in the system cache for all users. Consequently, all page customization options are disabled.

For more information, see [Section 7.10.1, "Changing How a Page Is Cached"](#) and [Section 7.10.3, "Page Caching Options"](#)

9. Click **Next**.

10. Select:

- **Blank Page** to create a blank mobile page.
- **Base On Existing Page** to pre-populate the mobile page with the same content as an existing page.

Click the **Browse** icon next to the **Existing Page** field, and the **Return Object** link next to the page you will use as the starting point for your mobile page.

Note: You can base a mobile page only on a Standard page. If you want to create a new mobile page based on an existing mobile page, copy the mobile page, then edit the copy.

11. Click **Next**.

12. (Optional) Select **Display Page To Public Users** if you want everyone, including users who are not logged into the portal, to be able to view the page.

13. (Optional) To explicitly grant privileges to specific users or groups:

- a. In the **Grantee** field, enter the name of the user or group you will allow to access this page.

Alternatively, click the **Users** or **Groups** icon, and select from the list provided.

Note: Because Oracle Internet Directory (OID) can include multiple containers that can use the same group names, the distinguished name (DN) is displayed next to any group that does not belong to the local OracleAS Portal instance.

- b. In the list, choose a privilege level.

Alternatively, click the **Users** or **Groups** icon, and select from the list provided.

Note: If you based your mobile page on an existing page, the new page uses the same access settings as the existing page. You can change these settings later. Privileges that do not apply to mobile pages are converted as follows:

- Manage Items With Approval becomes Manage Content
 - Manage Style becomes Customize Portlets (Full)
 - Customization (Style) becomes View
-
-

- c. Click **Add**.

14. Click **Finish** to create the page.

If you based your mobile page on an existing page, and the existing page is complex, the page creation process may take a while as the existing page is converted into a layout more suited for display on mobile devices. When you click the **Finish** button, you are given the opportunity of continuing the page creation process in the background so that you can move on to other tasks. If you attempt to edit the mobile page before the creation is completed, a pop up window will inform you that the page is not yet complete.

If you add a portlet to a page that was used as the starting point for a mobile page, that portlet will not appear on the mobile page. If you want the portlet to also appear on the mobile page, you must add it to the mobile page. Additionally, if you want to share any customizations made to the portlet between the two pages, you must explicitly share the portlet on one page, and then add that shared portlet instance to the other page. For more information, see [Section 7.6.2.5, "Sharing a Portlet Across Multiple Pages"](#).

7.1.6.3 Adding Content to a Mobile Page

Note: To add content to a mobile page, you must have at least the Manage Content privilege on a level within the mobile page.

To add content to a mobile page:

1. Go to the mobile page you will work with.

For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).

2. Click **Edit**.
3. Click the **Add Portlet** icon to add a portlet to the page.

Navigate through the Portlet Repository to find the portlet you want to add, click the portlet name, then click **OK**. In the mobile page's Edit mode, click **Edit Defaults** next to a portlet to change the portlet properties.

Note: You can add only mobile-enabled portlets to mobile pages. If you publish a page as a portlet, if that page does not contain any mobile-enabled portlets, URL items, Page Link items, or tabs, it will not appear as a mobile-enabled portlet.

4. Click the **Add Item** icon to add an item to the page.

You can add any item type that is based on BaseURL, BasePageLink, and BaseSubPageDisplay. This means the item types potentially available for mobile pages include Simple URL, URL, Simple Page Link, Page Link, and SubPage Display. This also means that any item types that users create that are based on these types are also potentially available for adding to mobile pages.

Once an item has been added to a page, click the **Create** or **Edit** link next to an item to create a new item or change the item properties.

Note: When a page group is first created, none of these item types are available. You can edit the properties of the parent page group to make these item types available.

5. Click the **Add Level** icon to add a level to the page.

A level is displayed on the page as a link that users can click to drill down to more content. Levels provide the flexibility to represent a large amount of content while limiting the displayed list to fit the small display sizes of most mobile devices.

6. Click the **Level Properties** icon to change the name of the level, or to specify who can access a particular level.

Levels are the equivalent of tabs on a standard page, and the same access rules apply; see [Section 7.5.3.3, "Controlling Access to a Tab"](#) for more information.

7. Click the **Rearrange** icon to rearrange the order of portlets, items, and levels within the current level.
8. Select the check box next to one or more portlets, items, and levels and click **Hide** to hide them on the page.
9. Select the check box next to one or more hidden portlets, items, and levels (displayed in gray) and click **Show** to show them on the page.
10. Select the check box next to one or more portlets, items, and levels and click **Delete** to remove them from the page.
11. Select the check box next to one or more portlets and items, and click **Move** to move them to a different level of the page.

Note: You cannot move levels.

12. Select the check box next to one or more portlets, and click **Share** to make these particular instances of the portlets available to other pages.

For more information, see [Section 7.6.2.5, "Sharing a Portlet Across Multiple Pages"](#).

You can use a mobile device to access a portal page that contains a page portlet within another page portlet. However, when a user navigates to the inner page portlet, it may not be possible to navigate back without going back to the Home page. The **Back** link context is lost when page portlets are nested on mobile pages and when viewing a standard page on a mobile device.

7.1.6.4 OracleAS Portal and MobileXML

MobileXML is well-formed XML that conforms to the Oracle Application Server Wireless MobileXML DTD. The Oracle Application Server Wireless gateway transforms MobileXML generated by OracleAS Portal portlets into device-specific markup (such as tinyHTML and WML). This allows your MobileXML portlet to be displayed on a variety of mobile devices automatically.

OracleAS Portal includes a MobileXML portlet in its portlet repository. Use it to write MobileXML. The following steps describe placing the MobileXML portlet on a standard page.

For more information on MobileXML and the MobileXML DTD, see the Oracle Application Server Wireless documentation on the Oracle Technology Network, <http://otn.oracle.com>.

7.2 Navigating to Pages

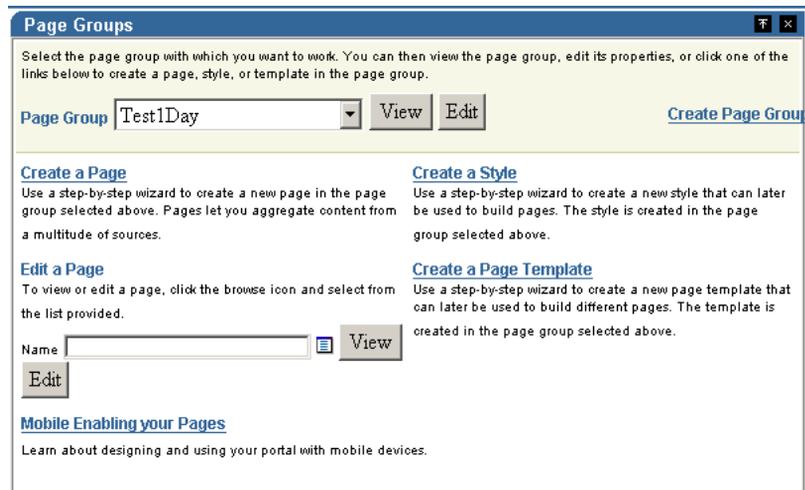
When editing pages, the first step often requires navigating to the page. We recommend wherever possible that you go through the Portal Builder page; however, in some cases, for some tasks, you will go through the Navigator. This section provides information on the different ways you can locate pages, including:

- [Locating a Page Through the Portal Builder Page](#)
- [Locating a Page Through the Navigator](#)

7.2.1 Locating a Page Through the Portal Builder Page

You locate pages through the Portal Builder page via the Page Groups portlet. Default installations of OracleAS Portal place this portlet on the Build tab of the Portal Builder page. If you don't find it there, ask your portal administrator where this portlet is located.

Figure 7-1 Example of the Page Groups Portlet



To locate a page through the Portal Builder page:

1. In the Portal Builder page, click the **Build** tab to bring it forward.
2. Go to the **Page Groups** portlet.
3. Click the **Browse** icon next to the **Name** field under **Edit a Page**.
4. In the window displayed, click the **Plus** icon next to the page group that owns the page you're locating.
5. In this way, drill to the relevant page, and click the **Return Object** link next to it.
6. In the **Page Groups** portlet, click the **View** or **Edit** button, depending on what you will do next, next to the now populated **Name** field.

7.2.2 Locating a Page Through the Navigator

You locate pages in the Navigator first through the page's page group, then through one of the nodes under that page group, either the Pages, Templates, or Navigation Pages node. This section describes how to get to these nodes in the Navigator.

To locate a page through the Navigator:

1. In the Portal Builder page, click the **Navigator** link at the top of the page.
2. In the Navigator, click the **Page Groups** tab to bring it forward.

At this point, if you wish you can enter the name of the page you want to locate in the **Find** field at the top of the tab, click **Go**, and select the page from the list of returned results. If you're unsure of the page name, or prefer to drill to a specific page, continue with Step 3.

3. Click the page group that owns the page you want to locate.
4. On the resulting page, click the node for the type of page you want to locate:
 - a. Click the **Pages** node to locate standard, mobile, JSP, URL, and PL/SQL type pages.

If the page you want is a sub-page of one of the main pages, drill to it by clicking the Sub-Pages link next to its parent page.
 - b. Click the **Templates** node to locate page templates.
 - c. Click the **Navigation Pages** node to locate navigation pages.

7.3 Performing Actions On Pages

In addition to the many actions you can perform within a page, there are a number of things you can do to the entire page. This section explores those actions and explains how to carry them out. It includes the following subsections:

- [Copying a Page](#)
- [Moving a Page](#)
- [Deleting a Page](#)
- [Publishing a Page as a Portlet](#)
- [Performing Actions on Multiple Pages Simultaneously](#)

7.3.1 Copying a Page

You can use an existing page as a starting point for a new page. Use the Copy feature to copy an existing page, and then edit the copy. Note that you can create a copy of a page only within the same page group as the original page.

To copy a page:

1. In the Portal Navigator, click the **Page Groups** tab to bring it forward.

To get to the Portal Navigator, click the **Navigator** link at the top of the Portal Builder. If the link does not display, ask your page group or portal administrator for access to this link.

2. On the resulting page, click the page group that owns the page you want to copy.

Tip: If you want to copy the page group's home page, click the **Copy Root Page** link next to the page group.

3. On the resulting page, click the **Pages** node.
4. Click the **Copy** link next to the page you want to copy.

Note: If the page you want to copy is a sub-page of one of the pages listed here, click the **Sub-Pages** node next to the parent page, and continue to drill down the page hierarchy until you see the page you want to copy listed in the Portal Navigator.

5. In the **Page Group Map**, click the **Copy Here** link next to the page under which you want to create the copy.

Note: You can create a copy only in the same page group as the original page.

6. In the **Name** field, enter a name for the new page. The name can be used in a URL to directly access the page. Direct access URLs take the following format:

`http://<hostname>:<portnumber>/pls/<dad>/url/page/<pagegroupname>/<pagename>`

For example:

`http://mymachine.mycompany.com:5000/pls/portal/url/page/myportal/mypage`

`http://mymachine.mycompany.com:5000/pls/portal/url/page/myportal/mypage/mysubpage`

The name is limited to 40 characters, and can contain any alphanumeric character (A-Z, a-z, 0-9), spaces, and the following special characters:

`- _ . ! , ; = + ~ @ () [] { } ^ $`

7. In the **Display Name** field, enter a descriptive name for the new page.

The display name is limited to 40 characters. This is the name that is displayed in the Portal Navigator.

8. (Optional) Select **Copy Access Control** if you want the new page to have the same privilege settings as the original page.
9. (Optional) Select **Copy Sub-Pages** if you want to include the original page's sub-pages in this copy.

Note: The copy options specified for the page also apply to its sub-pages. For example, if you select **Copy Access Control**, the privileges of the sub-pages are also copied. Also, copied sub-pages retain their original names.

10. (Optional) Select **Copy Content** to copy the content of the original page as well as its properties.
11. (Optional) Select **Copy Portlet Customizations** to copy any customizations that were made to the portlets on the original page.

If you do not select this option, the portlets on the new page are reset to their default settings.

Note: This option is only available if you select **Copy Content**.

12. Click **OK** to create the new page.

7.3.2 Moving a Page

You can move a page to a different location within the page group that owns it.

- You cannot move a page if an item in that page or any of its sub-pages has been locked by a WebDAV client or is checked out by another user.
- Moving a page also moves all of its sub-pages.
- You cannot move a page to a different page group.

To move a page:

1. In the Portal Navigator, click the **Page Groups** tab to bring it forward.

To get to the Portal Navigator, click the **Navigator** link at the top of the Portal Builder. If the link does not display, ask your page group or portal administrator for access to this link.

2. On the resulting page, click the page group that owns the page you will move.
3. Click the **Pages** node.

If necessary, to drill down to the right page click the **Sub-pages** link next to the page that owns the page you will move.

4. Click the **Move** link next to the page you want to move.
5. In the **Page Group Map**, click the **Move Here** link next to the page under which you want to move the page.

7.3.3 Deleting a Page

When you delete a page, all of its sub-pages are also deleted. Deleted pages cannot be retrieved.

To delete a page:

1. In the Portal Navigator, click the **Page Groups** tab to bring it forward.

To get to the Portal Navigator, click the **Navigator** link at the top of the Portal Builder. If the link does not display, ask your page group or portal administrator for access to this link.

2. On the resulting page, click the page group that owns the page you want to delete.
3. Click the **Pages** node.
4. Click the **Delete** link next to the page you want to delete.
5. In the confirmation page, click **Yes**.

Note: All of this page's sub-pages are also deleted. Separate confirmations for sub-pages are not displayed.

If you have the appropriate privileges, you can delete a sub-page by switching to Edit mode, Graphical view and clicking the **Delete** icon next to the sub-page link in a sub-page links region.

7.3.4 Publishing a Page as a Portlet

Before users can add a page to a region on another page, the page being added must first be published as a portlet.

You can publish only the following types of pages as portlets: navigation pages, Standard pages, and page types you create that are based on the Standard page type.

To publish a page as a portlet:

1. Go to the page you will publish as a portlet.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Properties** link next to **Page** in the page toolbar.
Be sure to click the link for the *page* rather than the *page group*.
4. Click the **Optional** tab to bring it forward, and go to the **Publish as Portlet** section.
5. Select **Publish As Portlet**.

6. Select **Use Style Of Page On Which Portlet Is Placed**, if you want the page portlet to use the style of the page on which it is placed.

If you do not select this check box, when the page is added as a portlet, it uses its own style.

Note: If the portlet background color of the style applied to the container page (i.e., the page on which the portlet is added) is set to a specific value, rather than left blank, this setting is ignored.

7. To use a different heading for the portlet, enter the heading in the **Portlet Display Name** field.

By default, the page display name is displayed in the portlet header.

8. Click **OK** to save your changes and return to the page.

The portlet is published to the Portlet Repository. You can find it easily using the Search feature in the repository. Search for the portlet display name.

You can also navigate to your new page portlet. If this is the first object published for this page group, the page group is added to the list of providers on the **Published Portal Content** page of the Portlet Repository. Click the **Published Portal Content** link in the Portlet Repository, then the page group name to drill down through the repository to your new page portlet.

If you have the required privileges, you can move the page group provider to a preferred location in the Portlet Repository.

7.3.5 Performing Actions on Multiple Pages Simultaneously

You can simultaneously perform an action on multiple pages in a page group:

- Delete
- Move
- Copy
- Add to or overwrite access privileges
- Make public
- Make private

Note: You must be the page group or portal administrator, or have the appropriate privilege on the objects, to perform actions on multiple objects.

To perform actions on multiple pages simultaneously:

1. In the Portal Navigator, click the page group that owns the pages you will change through bulk actions.

To get to the Portal Navigator, click the **Navigator** link at the top of the Portal Builder. If the link does not display, ask your page group or portal administrator for access to this link.

2. On the resulting page, click the **Pages** node.
3. On the resulting page, click the **actions** link in **Perform actions on multiple objects simultaneously**.
4. On the resulting page, select the pages you want to change, then select an action, such as **Delete**.

If an object does not include a check box, you do not have permission to perform an action on the object.

7.4 Defining a Page's Appearance

With OracleAS Portal, you have many options for creating the overall appearance of a page. This section explores these options and describes how to put them to use. It includes the following subsections:

- [Applying a Style to a Page](#)
- [Applying a Template to an Existing Page](#)
- [Detaching a Page from Its Template](#)
- [Applying a User Interface Template to a Page](#)

7.4.1 Applying a Style to a Page

The style you apply to a page governs the colors and fonts used by the page and all the tabs, portlets, and items displayed within it.

You can apply styles to standard pages and pages of a custom type that is based on a standard page.

You can specify that the page use the current user's default style. The user's view of the page will display in that style. Users set their default style under **Account Info**. For more information, see [Section 1.1.6, "Choosing a Default Page Style"](#).

If you base a page on a page template that does not allow pages to use a different style, your users will not be able to apply a different style to the page when they edit or customize the page.

If you apply a different style to a page template, that style is also applied to any page that is based on that template. However, if the template allows pages to use a different style, and users have chosen different styles for pages based on the template, changes to the page template style do not affect these pages.

There is a hierarchical structure to the application of styles when no explicit style is selected. First, it's useful to understand that default styles can be set at the system, page group, and individual user levels.

- The system default is set on the Administer tab in the Services portlet under **Global Settings**.
- The page group default is set in *page group* properties.
- The user default is set by the user under **Account Info**.

Note that the page group default is not automatically applied to the page group root page; you must explicitly specify a style in the root page's *page* properties.

If the page group administrator has selected the page group option to **Copy Parent Page Properties When Creating Page**, new pages created in the page group will (by default) use the same style specified in the parent page's *page* properties (rather than the default style selected in the *page group* properties).

To summarize how default styles are used:

- When page group administrators configure a page group to **Copy Parent Page Properties When Creating a Page**, then sub-pages use the style specified in the *page* properties of the page group's root page (or, if the parent page is not the root page, the style specified in the *page* properties of the parent page).
- When page group administrators de-select the **Copy Parent Page Properties** configuration option, the page group's default style, specified in *page group* properties, is used for newly created sub-pages.
- When page group administrators de-select the **Copy Parent Page Properties** configuration option, and the page group's default style is set to <None>, then the system default style is applied.

- An individual user's default style is specified in each user's **Account Info** settings. Users go into their personal portal accounts and select a preferred page style. This selection is applied when a page designer explicitly selects the page style <Use User's Default Style>. If the user default is set to <None>, then the page uses the page group's default style; if that is also set to <None>, then the page uses the system default style.

All of this becomes moot when you explicitly apply a style to a page.

Note: To apply a style to a page, you must have at least the Manage Style privileges on the page, and the **Allow Privileged Users To Manage Page Style** page group setting must be enabled.

To apply a style to a page:

1. Go to the page where you will apply a style.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. In the page toolbar at the top of the page, click the **Style** link.
4. Choose the style you want to use from the **Choose Style** list.

Note: The **Choose Style** list includes all styles that you have created in this page group, all styles that were created in this page group by others and that you have privileges to use, and all styles in the Shared Objects page group.

Additionally, this list includes the choice <**Use User's Default Style**>. With this selection, the style a user chooses via the **Account Info** link will be used. The style each user will see will depend on his or her default style.

The **Current Style** field shows which style is currently applied to the page. The **Style Properties** section includes a preview of the current style's settings.

If you cannot find a style with the color and font settings that you want, and you have the appropriate privileges, you can click the link in the **Style Properties** section to edit an existing style, or you can use the **New Style** section to create a new style.

5. Click each of the radio buttons in the **Style Properties** section to preview the colors and fonts used in the style.

The Style Properties section shows the style that is currently selected in the **Choose Style** list.

6. Click **OK** to save your change and return to the page.

7.4.2 Applying a Template to an Existing Page

When you create or edit pages, you can choose to base those pages on a particular page template. If a page is based on a template, any changes made to the template are automatically cascaded to all pages that use it. A page template provides a way of enforcing a particular look and feel and establishing a common security model for multiple pages. You can apply page templates only to standard pages or pages of a custom page type that is based on the standard page type.

This section describes how to apply a template to an existing page. For more detailed information on templates, see [Section 6.1, "Working with Page Templates"](#).

To apply a template to an existing page:

1. Go to the page where you will apply a template.

For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).

2. Switch to **Edit** mode.
3. In the page toolbar at the top of the page, click the **Properties** link next to **Page**.
Be sure to click the link for the *page* rather than the *page group*.
4. Click the **Template** tab to bring it forward.
5. from the **Page Template** list, select the template you want to apply.

The Region Mapping section may appear on the **Template** tab. If it does, that means that one or more regions on the page contain content that must be placed somewhere within the template you selected. Region Mapping is displayed only when:

- You are choosing a template for a page that 1) has never had a template applied, and 2) contains content.
- You are choosing a new template for a page that 1) already has a template applied, and 2) contains portlets or items that were added to the base page after the original template was applied.

- One or more users customized the page for their own use by adding content. As the page designer, you must decide where the content should be located not only for the base page, but for every single customization of the page.
6. For each region listed in the **Move content from...** column, select a new home for the content using the drop-down list in the **Move content to...** column.

The drop-down list displays only those regions that:

- Allow content to be added. If the **Enable Pages To Include Content In This Region** check box was de-selected, the region is not eligible to have content moved into it, and thus is not displayed.
- Match the type (portlet or item) of the region named to the left. If no region of the appropriate type exists in the selected template, you may want to select **<Discard Content>**.

The **<Discard Content>** option is useful when assigning a template to a page that already has some template-like elements on it, such as a banner. For example, if the page has content in the banner region, you may not want to move the old banner content over to the new template's banner region. Instead, you may opt simply to discard that content.

All items and portlets on the page must have a home in the new template. So, if your page contains an item, but you chose a new template that does not have a region allocated to items, you must either discard that item or choose a different template.

7. Use the **Preview** section to determine which region corresponds to a given region number.

If the region has a name, the name is used instead of a number.

8. Click **OK**.

Content belonging to the original template is not eligible for mapping to the new template because it belongs to the template and not to the page.

For example, a page was initially based on Template A, which contains a company logo and a Favorites portlet. When Template B is applied, the page loses the logo and the Favorites portlet (if they are not also included in Template B). You will not have an opportunity to map the Favorites portlet that used to appear on the page because it belonged to Template A, not to the page.

Content that belongs to the template itself is flagged by the **From Template** icon.

7.4.3 Detaching a Page from Its Template

If you decide that you no longer want to use a page template for a particular page, you can detach the page from the template.

When you detach a page from its template, the page retains the same layout and content as before, but the page now owns it. This means that changes to the template will no longer affect the page. You will also now be able to change the layout of the page and add content to any region.

To detach a page from its template:

1. Go to the page you will detach from its template.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. In the page toolbar at the top of the page, click the **Properties** link next to **Page**.
Be sure to click the link for the *page* rather than the *page group*.
4. Click the **Template** tab to bring it forward.
5. Click the **Detach from Template** link next to the **Page Template** field.

Note: If you do not see the **Detach from Template** link, the page does not use a template.

6. In the confirmation page, click **Yes** to detach from the template.
7. Click **OK** to return to the page.

7.4.4 Applying a User Interface Template to a Page

You can use user interface templates to determine the design elements to display around the contents of a page.



You'll find additional information about using templates in the technical note "OracleAS Portal Best Practices: Templates." You'll find this on Portal Center, <http://portalcenter.oracle.com>. Click the **Search** icon in the upper right corner of any Portal Center page.

[Figure 7-2](#) shows a page that uses a user interface template (this page has only one portlet on it):

Figure 7–2 A User Interface Template



You can apply user interface templates only to Standard pages, or pages of custom types based on the Standard page type.

To apply a user interface template to a page:

1. Go to the page where you will apply a user interface template.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. In the page toolbar at the top of the page, click the **Properties** link next to **Page**.
Be sure to click the link for the *page* rather than the *page group*.
4. Click the **Optional** tab.
5. Go to the **User Interface Templates** section, and choose a user interface template from the **UI Template** list.

Tip: The option to use a UI template for a page is available only if the user interface page group setting has been enabled.

6. Click **OK** to return to the page.

You can apply only unstructured UI templates to pages. Structured user interface templates are intended solely for use with portlets.

7.5 Designing the Layout of a Page

The layout of a page is determined by the configuration of its regions. You can visualize regions as simple, discrete, rectangles, which divide up the surface area of a page. In these rectangles, you place the images, links, text, files, portlets, and other content you wish to appear on your portal page (see also, [Section 7.6, "Adding Content"](#)). Regions serve both to provide the layout structure of a page and to contain your portal content. You can use tabs to produce a virtual stack of regions. You can subdivide regions on both pages and tabs into multiple regions.

As simple as the concept of regions is, it is nonetheless possible to exercise a number of powerful controls over how a region behaves. This section explores the controls you can bring to bear on regions and provides information on how to use those controls to get your desired result.

This section discusses how to use OracleAS Portal regions. It includes the following subsections:

- [Using Regions to Create a Page Layout](#)
- [Configuring Region Display Options](#)



You'll find more information about regions in the technical note "OracleAS Portal Best Practices: Regions," on Portal Center, <http://portalcenter.oracle.com>. Click the **Search** icon in the upper right corner of any Portal Center page.

7.5.1 Using Regions to Create a Page Layout

A region is an area on a page that displays information and can contain either portlets, items, tabs, or links to sub-pages of the current page. When you first create a page, it consists of at least a single region. After creating a page, you can edit it to add more regions.

This section discusses the ways you can use regions to create a page layout. It includes the following subsections:

- [Adding a Region to a Page](#)
- [Deleting a Region from a Page](#)

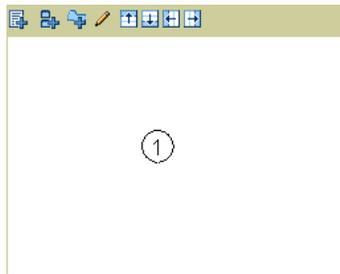
7.5.1.1 Adding a Region to a Page

If you have Full Customization privileges on a page, you can add regions to the tabs you created when you customized the page. You cannot add regions anywhere else in the page.

To add a region to a page:

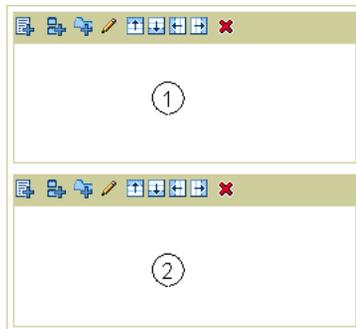
1. Go to the page where you will add a region.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Use the **Add Region** icons to add a region to the page.
For example, a page currently has a single region ([Figure 7-3](#)):

Figure 7-3 A Region

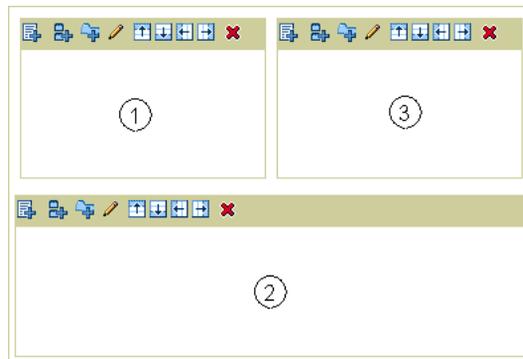


Click the **Add Region Below** icon in region 1 to create a second region (region 2) of the same width directly below region 1 ([Figure 7-4](#)):

Figure 7-4 Two Regions



Click the **Add Region Right** icon in region 1 to create third region (region 3) to the right of region 1 ([Figure 7-5](#)):

Figure 7–5 Three Regions

Note: Region 3 is the same height as region 1 (the region next to 3), not the height of the entire page.

- When you add a region while *editing* a page, the region type is *undefined*.
The new region has the potential to contain either portlets, items, sub-page links, or tabs. It does not matter what the region type was where you clicked the **Add Region** icon. When you designate the region as a portlet, item, or sub-page link region, the new region will use the same property settings as the source region. If you change the new region to be the same type as the source region, the new region will use the same attribute list as the source region. If you change the new region to be a different type than the source region, the new region uses the default attribute list for that region type.
- When you add a region while *customizing* a page, the new region type defaults to *portlet*. In Customize mode, you can add new regions only to newly created tabs (i.e., customized tabs you see only in your view of the portal). And you can add only tab or portlet type regions to it (that is, you can add a portlet or a subtab to a custom tab).

If a page is based on a page template, region configuration is determined by the page template. You will not be able to add more regions directly to the page. To add more regions, you must add them to the page template (provided you have the required privileges).

7.5.1.2 Deleting a Region from a Page

Deleting a region from a page changes the entire landscape of the page. Once you've deleted a region there is no way to reinstate it, so be sure that is the action you want to take.

If the region you are deleting contains portlets or items, you are prompted to specify where you would like to relocate them. If the region contains tabs or sub-page links, you cannot relocate them within the Delete Region screen. With tabs, you must either delete the region and all its content, or cancel and relocate the content before deleting the region. With a sub-page links region, you must add another region of the same type.

If you have Full Customization privileges on a page, you can delete regions from your own tabs when you customize the page; you cannot delete regions anywhere else in the page.

To delete a region from a page:

1. Go to the page where you will delete a region.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Delete** icon in the region you want to delete.
4. If the region contains portlets or items, you are prompted to specify where you would like to relocate them.

Use the radio buttons to make your selection, then click **Move Content**. Alternatively, click **Delete Content** to remove the region and its content.

Note: You can move portlets only to another portlet region; you can move items only to another item region.

5. If the region contains tabs, you are reminded that deleting the region will delete all the tabs within that region and remove all the content on those tabs.

Click **Delete Region** to continue, or **Cancel** if you want to move the portlets or items before deleting the region.

Note: Every page contains at least one region. If there is only one region in a page, you will not be able to delete it.

7.5.2 Configuring Region Display Options

Regions come with powerful controls you can use to define how they will treat the content that is placed inside them. The next sections describe how to use those controls, including:

- [Changing the Region Name](#)
- [Changing the Region Type](#)
- [Freezing the Content of a Region](#)
- [Changing the Height and Width of a Region](#)
- [Displaying or Hiding Banners](#)
- [Changing the Number of Columns and Rows in a Region](#)
- [Changing the Alignment of Items](#)
- [Setting Sub-Page Links Properties](#)
- [Setting a Uniform Height or Width for Item Images](#)
- [Changing the Attributes Displayed in a Region](#)
- [Specifying the Display Order of Items in a Region](#)
- [Grouping Items in a Region](#)
- [Showing or Hiding Portlet Header Links](#)
- [Displaying or Hiding Portlet Headers and Borders](#)
- [Changing Portlet and Item Spacing](#)
- [Applying a Style to a Region](#)

7.5.2.1 Changing the Region Name

Providing a name for a region is useful for at least two reasons:

- To identify the content of a region for your users
You can display the region name in a banner at the top of the region to let users know what kind of content to expect in the region.
- To provide descriptive names for regions during region mapping
Regions names are also useful for identifying specific regions when you map the regions in an existing page to the regions in a new template you are

applying to that page. The name appears above the region in lieu of an automatically assigned number.

To change the region name:

1. Go to the page where you will change a region name.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon in the relevant region.
4. Go to the **Region Display Options** section, and enter a name in the **Display Name** field.

Note: The region display name must be no more than 40 characters.

5. If you want to display the region name in a banner at the top of the region, select **Display Region Banner**.
6. Click **OK** to return to the page.

7.5.2.2 Changing the Region Type

The region types are item, portlet, sub-page links, tab, and undefined. Region types accept only their related type of content. For example: Add portlets to a portlet region and items to an item region. You cannot add portlets to an item region, nor can you add items to a portlet region. You cannot add anything to a sub-page links region; these regions automatically populate with links to sub-pages of the current page. You cannot add anything to a tab region; although you can configure the tab to include, for example, rollover images.

If you have Manage privileges on the page, you can add a portlet or an item to an undefined region. Once you add content to an undefined region, the region becomes defined: it becomes a portlet region if you add a portlet, an item region if you add an item.

Users who do not have Manage privileges on the page cannot add content to an undefined region. For them, undefined regions display without edit controls. To enable such users to add content, a user with Manage privileges on the page must explicitly change the region type to item or portlet, or add an item or a portlet to the region.

You can change the region type of portlet and item regions only if the region is empty. You can change the region type of sub-page link regions at any time, whether or not the region contains any links to sub-pages. You cannot change the region type of a tab region. You cannot change a region type in a page template if a page that is based on the template already includes content in that region.

To change the region type:

1. Go to the page where you will change a region type.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon in the relevant region.
4. Go to the **Region Type** section, and from the **Type** radio group, select either:
 - Items
 - Portlets
 - Sub-Page Links
 - Undefined

Note: If you do not see the radio buttons, your region already contains items, portlets, or tabs; so you cannot change the type. Delete the tabs, or delete or move the items or portlets; and try again.

You can change the type of a sub-page links region at any time, provided you have the privileges to do so and the region is not part of a template applied to the page you are working with.

5. Click **OK** to return to the page.

7.5.2.3 Freezing the Content of a Region

You may want to freeze the content of a particular region so that users cannot change what appears in that region. For example, your page might be divided into regions that contain navigational elements and a main content region. You want users to be able to edit or customize the content in the main content region, but you don't want them to be able to edit or customize the other regions.

In page templates you can freeze the content of regions so that users cannot change it when they are editing or customizing a page that is based on the template.

You can also freeze the content of regions in pages. This means that users cannot change the content in these regions when they *customize* the page. Users with Manage privileges can still change the content of these regions when they *edit* the page.

Freezing Region Content in a Page Template

To freeze the content of a region in a page template:

1. In the Portal Navigator, click the **Page Groups** tab to bring it forward.
To get to the Portal Navigator, click the **Navigator** link at the top of the Portal Builder. If the link does not display, ask your page group or portal administrator for access to this link.
2. On the resulting page, click the page group that owns the template you will change.
3. Click the **Templates** node.
4. Click the **Edit** link next to the template you will change.
5. On the resulting page, click the **Edit** icon in the relevant region.
6. Go to the **Region Content** section, and clear the check box **Enable Users To Include Content In This Region**.
7. Click **OK** to save your changes and return to the page template.

When users edit or customize a page based on this template, they will not be able to add content to the region, or hide, show, delete, or move existing content.

Freezing Region Content in a Page

To freeze the content of a region in a page:

1. Go to the page where you will freeze region content.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon in the relevant region.
4. Go to the **Region Content** section, and clear the check box **Enable Users To Include Content In This Region**.

Note: Users cannot customize the content of item regions; consequently, this check box appears only for portlet and tab regions.

5. Click OK.

When users *customize* the page, they will not be able to add content to the region, or hide, show, delete, or move existing content. Users can still add, hide, show, delete, and move content when they *edit* the page (rather than *customize*).

7.5.2.4 Changing the Height and Width of a Region

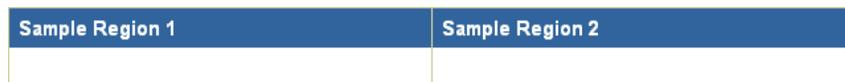
By default regions are all equal widths. For example, here is a page with a single region (Figure 7-6):

Figure 7-6 One Region Using 100% of Available Space



If you add another region to the right of the existing region, each region will take up 50% of the width of the page (Figure 7-7):

Figure 7-7 Two Regions, Each Using 50% of Available Space



If you want each region to take up a different amount of space, you can explicitly set the width of each region. You can set the width of a region to a specific number of pixels or to a percentage of the overall width of the page.

You can also set the height of a region.

To change the height and width of a region:

1. Go to the page where you will change the height and width of a region.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.

3. Click the **Edit** icon in the relevant region.
4. In the **Width** field, enter the width of the region in pixels (a number, such as 20) or as a percentage of the overall width of the page (a number and a percent sign, such as 20%).

Note: You must include a percent sign (%) if you want the number you enter to be interpreted as a percentage of page width, rather than a number of pixels.

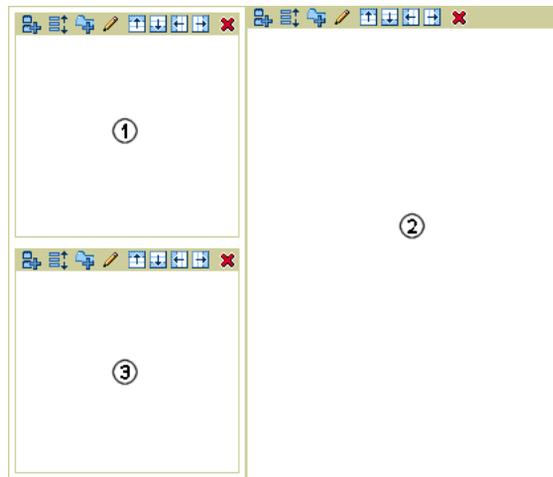
5. In the **Height** field, enter the height of the region in pixels.
6. Click **OK** to return the page.

If you choose to have the width of some regions expressed in pixels and others on the same page expressed in percentages, the page may look slightly different in different browsers.

If you enter a height or width of 1 in an attempt to make the region as small as possible, the region will expand to display the full content of the region.

If you add another region to the right or left of an existing region, the region widths are automatically reset to be equal. For example, if you have a page with two regions side-by-side, one with a width of 40% and the other 60%, if you add a third region on the same line, all the regions will be reset to a width of 33%.

You might have a region configuration that looks something like [Figure 7–8](#):

Figure 7–8 Region Divided to the Right, Then Below

In this case, even if you set regions 1 and 3 to have different widths, the actual width of the column will be as wide as the widest region in that column. So if region 1 had a width of 40% and region 3 had a width of 20%, when viewing the page, the column containing regions 1 and 3 would be 40% of the width of the page.

Pixel widths take precedence over percentage widths. Therefore, if region 1 had a width of 40% and region 3 had a width of 200 pixels, when viewing the page, the column containing regions 1 and 3 would be 200 pixels wide.

7.5.2.5 Displaying or Hiding Banners

You can choose whether or not to display banners in a region. There are two types of banners:

- The region banner appears at the top of the region (Figure 7–9).

Figure 7–9 Region with Banner

- Group By banners appear above each group of items in the region (Figure 7–10).

Note: For more information about grouping items in a region, see [Section 7.5.2.12, "Grouping Items in a Region"](#).

Figure 7–10 Group By Banners Appear Above Each Group of Items in the Region



To display or hide banners:

1. Go to the page where you will display or hide banners.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon in the relevant region.
4. Go to the **Region Display Options** section:
 - To display a region banner, provide a region **Display Name**, and select **Display Region Banner**. The region banner appears only if you have given the region a name.
 - To hide a region banner, clear the **Display Region Banner** check box.
5. Go to the **Item Display Options** section:
 - To display a Group By banner, choose a **Group By** option, and select **Display Group By Banner**. The Group By banner option is available only for item regions. The group by banners appear only if you have selected to group items in the region.
 - To hide a Group By banner, clear the **Display Group By Banner** check box.
6. Click **OK** to return to the page.

7.5.2.6 Changing the Number of Columns and Rows in a Region

If you have many items or portlets in a region, you may want to arrange the items or portlets into multiple columns to conserve space. You can specify how many columns and rows you want to include in a region.

Regardless of how many columns you include in the region, the number of rows dynamically expands to accommodate all the items or portlets in the region, provided you have not defined a specific number of rows.

If you specify a number of columns and a number of rows, and the number of items in the region exceeds the number of placements this allows, the overflow items will not display until you change the number of columns or rows to accommodate them. For example, if you have eight items, and you specify two columns and three rows, only six items display. The other two do not. The items that do not display are retained, rather than lost or deleted. If you change the number of rows to four or the number of columns to three, all eight items will display.

The following examples show the same region with different numbers of columns and rows:

Figure 7–11 Region with Eight Items in Four Columns (Rows not Specified)

Region 1

Item 1	Item 2	Item 3	Item 4
Item 5	Item 6	Item 7	Item 8

Figure 7–12 The Same Region with Two Columns and Three Rows (Two Items Truncated)

Region 1

Item 1	Item 2
Item 3	Item 4
Item 5	Item 6

To change the number of columns and rows in a region:

1. Go to the page where you will change the number of region columns and rows.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon in the relevant region.
4. Go to the **Region Display Options** section, and enter the number of columns you want for the region in the **Number of Columns** field.

Leaving this field blank will result in one column in the region.

5. In the **Number of Rows** field, enter the number of rows you want for the region.

Leaving this field blank will result in however many rows are required to accommodate whatever content is added to the region.

6. Click **OK** to return to the page.

7.5.2.7 Changing the Alignment of Items

Align items in a region to the left, center, or right.

The following example shows the same region with different item alignment settings:

Figure 7–13 The Same Region with Different Item Alignment Settings



To change the alignment of items in a region:

1. Go to the page where you will change the alignment of items.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon in the relevant item region.
4. Go to the **Item Display Options** section, and choose an item alignment from the **Item Alignment** list: **Left**, **Center**, or **Right**.
5. Click **OK** to return to the page.

7.5.2.8 Setting Sub-Page Links Properties

Sub-Page Links regions share many of the same region properties you find with item and portlet regions. Additionally, they have a few that are unique to type. These include:

- [Page Level Display](#)
- [Sub-Pages \(Icon, Description, and Rollover\)](#)
- [Image \(for Sub-Page Display\)](#)

Additionally, at the page level, you define which sub-page links will be displayed on the current page and specify link display order. For more information, see [Section 7.8.1, "Defining the Display of Sub-Page Links"](#).

Page Level Display

You can specify that either one or two levels of sub-page links should display in a Sub-Page Links region.

To set the level of sub-page links:

1. Go to the page that contains the Sub-Page Links region you will change.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon for the relevant region.
4. Go to the **Page Level Display** section, and select either:
 - **Display One Level Of Sub-Pages** to link to one level of sub-pages below the current page
 - **Display Two Levels Of Sub-Pages** to link to two levels of sub-pages below the current page
5. Click **Apply** to save your changes, or **OK** to save your changes and return to the page.

Sub-Pages (Icon, Description, and Rollover)

Use these properties to specify the attributes to display along with sub-page links. Choose from a sub-page icon, a description of the sub-page, an image/rollover image for the sub-page.

To specify which sub-page links attributes will display:

1. Go to the page that contains the Sub-Page Links region you will change.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon for the relevant region.
4. Go to the **Sub-Pages** section, and select any or all of the following attributes:
 - **Display Sub-Page Icon** to display an icon next to each sub-page link

- **Display Sub-Page Description** to display the content of the sub-page's description attribute
- **Display Sub-Page Image and Rollover Image** to display an image/rollover image in lieu of the page name

The image and (optionally) rollover image were specified for the sub-page when it was created (or edited). For more information about page images and rollover images, see [Section 7.8.4, "Specifying a Representative Image for a Page"](#).

5. Click **Apply** to save your changes, or **OK** to save your changes and return to the page.

Image (for Sub-Page Display)

Use this section to suppress or select the navigation icon to display on sub-pages. This icon displays on the sub-pages themselves. Users click it to navigate back up the hierarchy of pages.

To suppress or select the navigation icon to display on sub-pages:

1. Go to the page that contains the Sub-Page Links region you will change.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon for the relevant region.
4. Go to the **Image** section, and select one of the following image options:
 - **No Image** to suppress the display of a sub-page navigation icon
 - **Default Image** to display the default sub-page navigation icon (an upward-pointing arrow)
 - **Image** to display a sub-page navigation icon that you specify

In the first field, click the **Browse** button to locate and select a file on your file system.

OR

In the second field, either enter the URL and file name of an image on the Web, or enter the internal name of an image already uploaded into OracleAS Portal, for example `1655.gif`.

To obtain the internal name OracleAS Portal has assigned to an image, go to a place within your portal where the image is already in use; right click it; and select **Properties** from the right-click menu.

5. Click **Apply** to save your changes, or **OK** to save your changes and return to the page.

7.5.2.9 Setting a Uniform Height or Width for Item Images

When you add or edit an item, you can specify a representative image for that item. To ensure a consistent look, you may want to set a uniform height and width for these images.

If you set a uniform height and width, some item images may look squashed or stretched if they are larger or smaller than the height and width you specify.

To set a uniform height or width for item images:

1. Go to the page where you will set a uniform height or width for item images.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon in the relevant item region.

Note: The item icon height and width options are available only for item regions.

4. Go to the **Item Display Options** section, and enter the height (in pixels) in the **Item Icon Height** field.

If you leave this field empty, the height defaults to the actual height of the image.

5. Enter the width in the **Item Icon Width** field.

If you leave this field empty, the width defaults to the actual width of the image.

6. Click **OK** to return to the page.

7.5.2.10 Changing the Attributes Displayed in a Region

Typically, when you add an item to a region, you also enter information about that item into item attribute fields. For both portlets and items, some attributes are

populated automatically, such as the creation date; and they do not require any data entry when the item or portlet is added. Through region properties, you can specify which attributes you would like to display along with the item or portlet.

For example, by default, the Display Name and Image and Description attributes are displayed for each item in a region. In some regions you might want to provide more information. For example, you might want to include the Document Size, Expire Date, or some custom attribute specific to your own content. In some regions, you might want to provide less information. For example, you might choose not to include item descriptions.

To change the attributes displayed in a region:

1. Go to the page where you will change the displayed attributes.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon in the relevant region.
4. Click the **Attributes/Style** tab (for item regions) or the **Attributes** tab (for portlet regions).
5. To add an attribute to the region, select the attribute in the **Available Attributes** list and click the **Move Right** icon.

The attribute is added to the bottom of the **Displayed Attributes** list. Use the rearrange buttons to determine where the attribute is displayed in relation to the other attributes in the region.

For example, if you want the Description attribute to be displayed first, select Description in the Displayed Attributes list, and click the **Move Top** icon to move it to the top of the list.

Note: The **Portlet Content** attribute is selected by default for all portlet regions. If this attribute is not selected, portlets do not display in the region.

6. Add **<Blank Line>** and **<Space>** attributes to improve the layout of the attributes in the region.

You can add as many of these attributes as needed. By default, a single space is added between attributes. You can add more if desired. Use blank lines to

separate attribute values as required. If an attribute value following the blank line is empty, the blank line is not displayed to avoid unnecessary white space.

7. To remove an attribute from the region, select the attribute in the **Displayed Attributes** list and click the **Move Left** icon.
8. Click **Apply** to save your changes.
9. Click **Close** to return to the page.

If an item or portlet has no information for a particular attribute, the attribute will not be displayed in the region, even if you selected to display that attribute. For example, if you selected to display the Description attribute in a region, but the **Description** field has been left blank for a particular item in that region, then the Description attribute will not display next to the item.

Note, however, that no matter what attributes are displayed for the region, navigation item types, such as Portal Smart Links, List of Objects, and the like, do not display any attributes other than Item Content and Display Name (or some version of a display name, such as Search Label). If you remove Item Content or Display Name from the list of Displayed Attributes, navigation item types will nonetheless continue to display the Item Content or the Display Name.

You can display MIME type images next to items on a page to provide users with a visual cue about the item type. For example, a Word MIME type image is a small version of a Word document icon. It would display next to any Microsoft Word documents uploaded to the page. To display the MIME type image before any other attribute (recommended), select **Mime Type Image** in the **Displayed Attributes** list, and click the **Move Top** icon.

7.5.2.11 Specifying the Display Order of Items in a Region

You can specify the order in which items are displayed in a region. If the items are grouped through the Group By option, the display order you specify determines the order of the items within each group.

To order items in a region:

Note: The item ordering options are available only for item regions.

1. Go to the page where you will specify the display order of items in a region. For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).

2. Switch to **Edit** mode.
3. Click the **Edit** icon in the relevant item region.
4. In the **Sort By** list, choose:
 - **Default** to not order items.
If you choose this option, items are ordered according to how you explicitly place them in the region.
 - **Title** to order items alphabetically by their display name
 - **Size** to order items by their size

Note: If you choose to order the items in a region by display name or size, the **Arrange Items** icon is not displayed in the region toolbar. The order of the items is determined by the Sort By option. If your selection is other than **Default**, you cannot manually order the items.

5. In the **Sort Order** list, choose:
 - **Ascending** to order items from A to Z (**Title**), or smallest to largest (**Size**)
 - **Descending** to order items from Z to A (**Title**), or largest to smallest (**Size**)
6. Click **OK** to return to the page.

7.5.2.12 Grouping Items in a Region

You can group the items in a region by:

- Category
- Author
- Date
- Item Type

You can also choose to not group the items in the region.

[Figure 7-14](#) shows the same region, first grouped by item type, then grouped by category.

Figure 7–14 *The Same Region, First Grouped by Item Type and then by Category*

Simple Text	Category 1
Item 1	Item 2
Item 2	Category 2
Simple URL	Item 1
Item 3	Item 3

To group the items in a region:

Note: The Group By option is available only for item regions.

1. Go to the page where you will group the items in a region.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon in the relevant item region.
4. In the **Group By** list, choose:
 - **None** to not group items
 - **Category** to group items by their category
To change the order of the category groups, see [Chapter 5, "Working with Content"](#).
 - **Author** to group items by their author
Author groups are ordered alphabetically by user name.
 - **Date** to group items by their creation date
Date groups are ordered from oldest to most recent.
 - **Item Type** to group items by their item type
For example, File, Text, Image, etc. To change the order of the item type groups, see [Chapter 5, "Working with Content"](#).
5. Select **Display Group By Banner** if you want to display a banner above each group as shown in [Figure 7–14](#).

Note: To determine the order of items within each group, see [Section 7.5.2.11, "Specifying the Display Order of Items in a Region"](#).

6. Click **OK** to return to the page.

7.5.2.13 Displaying or Hiding Portlet Headers and Borders

Note: When you choose to display or hide portlet headers or borders, all the portlets within the region are affected. You cannot control portlet headers or borders for individual portlets within the region. However, you can display portlet headers or borders in one region and hide them in another.

Portlet headers contain the name of the portlet and any links that are available for display (see [Section 7.5.2.14](#)). Portlet borders outline the border of each portlet in a region. You can choose whether or not to display portlet headers and borders.

[Figure 7–15](#) shows the same region, first with portlet headers and borders displayed, then hidden.

Figure 7–15 *Same Region with Portlet Headers Displayed, then Hidden*



Because portlet headers contain the Customize link, if you hide headers, users will not be able to access this link nor customize the portlets in the region. Users will still be able to edit the portlet defaults by editing the page.

To display or hide portlet headers or borders:

Note: The portlet header and border options are available only for portlet regions.

1. Go to the page where you will display or hide portlet headers and/or borders.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon in the relevant portlet region.
4. Go to the **Portlet Display Options** section:
 - To display portlet headers, select **Show Portlet Headers**. To hide portlet headers, clear the **Show Portlet Headers** check box.
 - To display portlet borders, select **Show Portlet Borders**. To hide portlet borders, clear the **Show Portlet Borders** check box.
5. Click **OK** to return to the page.

7.5.2.14 Showing or Hiding Portlet Header Links

If you choose to show or hide a portlet header link, all the portlets within the region are affected. You control portlet header links for all portlets within the region, rather than for individual portlets. Additionally, you can display portlet header links in one region and hide them in another.

Choose which links to include in portlet headers.

- The **Customize** link enables users to customize the way the portlet appears.
- The **Help** link provides access to help text for the portlet.
- The **About** link provides access to a description of the portlet.
- The **Details** link provides access to a more detailed view of the portlet by clicking the portlet title.
- The **Remove** link enables users to remove the portlet from the page.
- The **Collapse/Restore** link enables users to minimize and maximize the portlet on the page.

For information on how to specify help text and descriptions for your portlets, see the *Portal Developer Kit* on Portal Center, <http://portalcenter.oracle.com>. Click the **Search** icon in the upper right corner of any Portal Center page.

If you have chosen not to display portlet headers, these links will not be displayed even if you have selected the appropriate check box.

To show or hide portlet header links:



Note: Portlet header link options are available only for portlet regions.

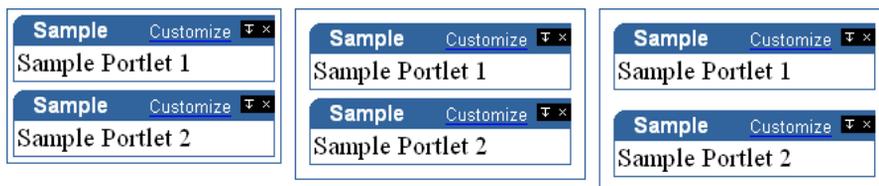
1. Go to the page where you will display or hide portlet headers.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon in the relevant portlet region.
4. Go to the **Portlet Display Options** section:
 - To show portlet headers, select **Show Portlet Headers**, then select the portlet header links you will display.
 - To hide portlet headers, clear the **Show Portlet Headers** check box.
5. Click **OK** to return to the page.

7.5.2.15 Changing Portlet and Item Spacing

You can change the amount of space to appear around and between the portlets and items in a region.

[Figure 7–16](#) shows the same region with different portlet spacing. In the first example the space around portlets is set to 4 pixels and the space between portlets is set to 6. In the second example, the space around portlets has been changed to 10 pixels. In the final example the space between portlets has been changed to 15 pixels.

Figure 7–16 *The Same Region with Different Portlet Spacing*



To change portlet or item spacing:

1. Go to the page where you will change portlet or item spacing.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).

2. Switch to **Edit** mode.
3. Click the **Edit** icon in the relevant region.
4. Go to the **[Portlet or Item] Display Options** section, and enter a value (in pixels) in the **Space Between [Portlets or Items]** field.
5. Enter a value (in pixels) in the **Space Around [Portlets or Items]** field.
6. Click **OK** to return to the page.

7.5.2.16 Applying a Style to a Region

The style you apply to a region governs the colors and fonts used by the region and all the tabs, items, and sub-page links displayed within it. (Note that you cannot apply a style to a portlet region. Portlet regions always use the style assigned to their host page.)

By default, regions use the same style as their parent page. However, you may want to apply a different style to a region to create visual interest or make the region stand out.

Note: To apply a style to a region, you must have at least the Manage Style privileges on the page, and the **Allow Privileged Users To Manage Page Style** option must be selected at the page group level.

If **Allow Privileged Users** is enabled, users with Manage privileges on the page can also apply a style to a region. Note, though, that you cannot change the style of a portlet region.

To apply a style to an item, tab, or sub-page links region:

1. Go to the page where you will apply a style to a region.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon in the relevant region.
4. Click the **Attributes/Style** tab (for item regions) or the **Style** tab (for tab and sub-page links regions).
5. Choose a style from the **Choose Style** list.

The **Choose Style** list includes all the public styles in this page group and the Shared Objects page group, as well as any styles that you have created in this page group for your own use.

If you want the region to use the same style that is applied to the page, choose **<Use Page Style>**.

If you cannot find a style with the color and font settings that you want, and you have the appropriate privileges, you can edit an existing style to meet your requirements.

6. The style you chose is applied to the region, and **Preview** is refreshed to show the style's settings.
7. Click **Close** to return to the page.

7.5.3 Using Tabs

Tabs allow you to increase the amount of information that your page can display. For example, suppose you want to create a home page for your entire user base. The information you want to provide encompasses several different areas, each of which is relevant for certain users. To consolidate the information and present it in an organized way, you decide to create four tabs ([Figure 7-17](#)):

Figure 7-17 Four Tabs



A tab can be in one of two states: active or inactive. In [Figure 7-17](#), the Technical tab is the active tab. An active tab is the one that is currently selected within a tab set. The rest of the tabs are inactive. You can specify different colors and fonts for active and inactive tabs.

This section explores some of the ways you can work with tabs within OracleAS Portal. It includes the following subsections:

- [Adding a Tab to a Page](#)
- [Changing Tab Text](#)
- [Controlling Access to a Tab](#)
- [Rearranging the Order of Tabs in a Region](#)
- [Hiding a Tab on a Page](#)
- [Changing the Alignment of Tabs](#)

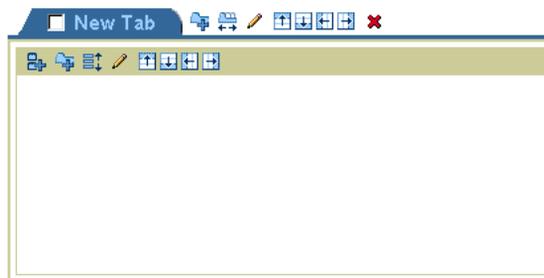
- [Applying Images to a Tab](#)
- [Adding a Rollover Effect to Tabs](#)
- [Deleting a Tab from a Page](#)

7.5.3.1 Adding a Tab to a Page

To add a tab to a page:

1. Go to the page where you will add a tab.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. In the region where you will add a tab, click the **Add Tab** icon.
The region now looks like [Figure 7–18](#).

Figure 7–18 *Region with a New Tab*



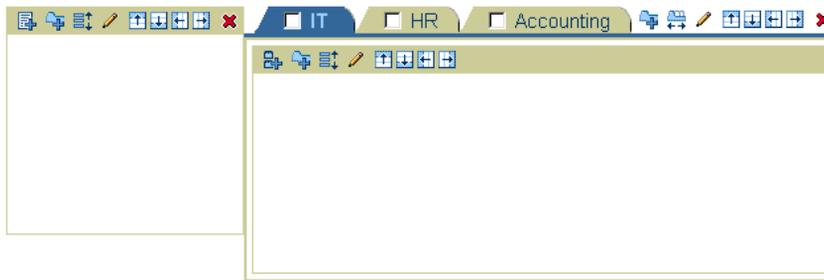
To add more tabs at the same level, click the Add Tab icon that *displays to the side of the tab* you just added. If you click the Add Tab icon below the tab, you'll start another row of tabs below this row.

4. Click **OK** to return to the page.

If you add a tab to a region that already contains items or portlets, a single tab is created to hold the items or portlets already in the region.

If there is a portlet or an item you want to appear on every tab—say, a link to your corporate Web page—divide your page into two regions: one containing your tabs, and the other containing the common portlet or item ([Figure 7–19](#)).

Figure 7–19 Plain Region and Tab Region



7.5.3.2 Changing Tab Text

When you first add a tab to a page, the text displayed on the tab defaults to **New Tab**. You can change this text to describe the contents of the tab.

Alternatively, you can change the appearance of a tab by uploading images for the tab. For information on how to do this, see [Section 7.5.3.7, "Applying Images to a Tab"](#). If you provide images for a tab, the tab's display name is used as rollover text—that is, it displays when the user moves the mouse pointer over the tab.

Note: To change tab text, you must have at least the Manage privilege on the tab.

If you have full customization privileges on a page, you can change the text of your own tabs when you customize the page; you cannot change the text of tabs that you did not add yourself.

To change tab text:

1. Go to the page where you will change tab text.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon on the relevant tab.
4. In the **Display Name** field, enter the text to display in the tab.
5. Click **OK** to return to the page.

7.5.3.3 Controlling Access to a Tab

Tabs can acquire access settings in the following ways:

- Inheriting access settings from the template
This assigns the tab the same access privileges as the template tab from which the tab is derived.
- Inheriting access settings from the page
This assigns the tab the same access privileges that have been assigned to the page on which the tab is placed.
- User specified access settings
This allows users with the appropriate privileges to control access to the tab apart from the page's access setting. A tab can have its own access setting.

Note: To control access to a tab, you must have at least the Manage privilege on the tab.

To control access to a tab:

1. Go to the page that contains the tab where you will define access settings.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon on the relevant tab.
This is the **Edit** icon on the prominent part of the tab.
4. Click the **Access** tab.
5. Select from one of the following:
 - **Inherit Access Settings from Template** *<template name>* if you want to assign the tab the same access privileges as the equivalent tab on the template it is based on. Continue at Step 9.

Note: This option displays when the tab is on a page that is based on a template.

- **Inherit Access Settings from Page** <page name> if you want to assign the tab the same access privileges that have been assigned to the page on which the tab is placed. Continue at Step 9.

Note: You can view these privileges from the Access tab when you edit the page or tab properties.

- **Specify Access Settings** if you want the tab to have its own access privileges, separate from the page itself.
6. Select **Display Tab To Public Users** if you want everyone, including users who are not logged into the portal, to be able to view the tab.
 7. Select **Enable Item Level Security** to allow item creators to specify access control for individual items on the tab.

Note: If you do not select this check box, all the items on the tab inherit access control from the tab. If you select this check box, item creators have the choice of inheriting access control from the tab, or specifying specific access control for individual items. For more information, see [Section 7.8.9.1, "What Is Item Level Security?"](#)

8. To explicitly grant privileges to specific users or groups:
 - a. In the **Grantee** field, enter the name of the user or group that you want to allow to access this tab.

Tip: If you are not sure of the name of the user or group, click the **Users** or **Groups** icon, and select from the list provided.

OracleAS Portal uses the Oracle Internet Directory (OID) for identity management, serving as the repository for users and groups. In OID, groups are uniquely identified by their distinguished name (DN). Each group has a unique DN, though many groups can share a common name, in the same way that two people can share a common name, yet have completely different lineage (i.e., John Smith and John Doe). When working within the portal, groups created from within that portal are displayed simply with their common names. However, when the portal references a group from some other location in the OID—such as a group from some other portal associated with the same Identity Management Infrastructure—the DN of the group is displayed to distinguish it from the portal’s locally defined groups.

- b. In the list, choose a privilege level.

Note: The order of the privileges in the list is not based on any hierarchy of privileges. For more information, see [Section 7.12.4, "Page Privileges"](#).

- c. Click **Add**.

9. To clear all the Web Cache entries for the tab, click **Clear Cache**.

The next time the tab is requested, it will be retrieved from the database rather than the cache.

If you revoke a user's privileges on the tab, the user will still be able to access the tab if it is in the cache. If you want to make sure that your changes are applied immediately, clear the tab from the cache by clicking this link.

Note: This link is available only if one or more of the Web Cache global settings are enabled. For information about global settings, see the *OracleAS Portal Configuration Guide*, available on Portal Center, <http://portalcenter.oracle.com>. Click the **Search** icon in the upper right corner of any Portal Center page.

10. Click **OK** to return to the page.

If you create a page that is based on a template, and the **Enable Pages To Have Different Access** option was selected for the template, the page and its tabs will not inherit the template's privileges by default. To have the page and its tabs inherit the template's privileges, edit the page and select **Inherit Access Settings from the Template** on the Access tab. Then edit the tabs, and verify that **Inherit Access Settings from the Page** is selected on the Access tab.

Use the Privilege list under **Change Access** to change a user or group's privilege level. Click the **Delete** icon to remove the user's or group's privileges entirely.

7.5.3.4 Rearranging the Order of Tabs in a Region

You can change the order in which tabs are displayed in a region.

If you have full customization privileges on a page, you can also rearrange the order of tabs when you customize the page. However, any changes you make to the order of tabs will be visible only to you.

To rearrange the order of tabs in a region:

1. Go to the page that contains the region where you will rearrange tabs.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Arrange Tabs** icon in the relevant region.
4. In the **Arrange Tabs** list, select a tab and use the arrows to reorder it in relation to the other tabs in the list.
5. Repeat step 4 for the tabs you will rearrange.
6. Click **OK** to return to the page.

7.5.3.5 Hiding a Tab on a Page

In some situations, you may want to hide a tab from users. For example, you may want to continue work on a tab before you make it available to other users. If you hide a tab, other users are not able to see the tab when they are viewing the page; however, you can see and work with it in Edit mode. Users will be able to see the tab when they customize the page, but it will be identified as a hidden tab.

Note: To hide a tab on a page, you must have at least the Manage privilege on the tab.

If you have customization privileges on a page, you can hide tabs when you customize the page. The tabs will be hidden only when you view the page; other users will still be able to see the tab.

Hiding One Tab

To hide a single tab:

1. Go to the page where you will hide a tab.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Actions** icon on the tab you want to hide.
4. Select **Hide**.

The tab now appears grayed out in Edit mode. If you switch back to View mode, the tab no longer appears. You can still edit the tab in Edit mode and show it again, if required.

Hiding Multiple Tabs At Once

To hide more than one tab:

1. Go to the page where you will hide multiple tabs.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode, **Layout** view.
3. Select the check box of all the tabs you want to hide.

Tip: At this point, you can also select portlets to hide.

4. Click **Hide**.

To show a hidden tab, click the **Actions** icon on the tab, and select **Show**.

7.5.3.6 Changing the Alignment of Tabs

You can specify whether tabs appear on the left or right side of a region. You can change the tab alignment only in a region that already contains at least one tab.

Figure 7–20 shows the same region with different tab alignment settings:

Figure 7–20 Same Region with Different Tab Alignment Settings



To change tab alignment:

1. Go to the page where you will change tab alignment.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon in the relevant region.

Note: Be sure to click the icon in the tabbed region itself (that is, the icon to the right of the tabs), not in a region within the tab.

4. In the **Tab Alignment** list, choose whether the tabs are displayed on the left or right side of the region.
5. Click **OK** to return to the page.

7.5.3.7 Applying Images to a Tab

You can change the appearance of tabs on your page by applying images to them. If you apply images to a tab, the tab's display name is used as rollover text—that is, it displays when the user moves the mouse pointer over the tab.

Each tab can have two different images: an active tab image and an inactive tab image. An active tab is the one that is currently selected within a tab set. The rest of the tabs are inactive.

Note: To apply images to a tab, you must have at least Manage privileges on the tab.

If you have full customization privileges on a page, you can apply images to your own tabs when you customize the page; you cannot apply images to tabs that you did not add yourself.

If you do not want to use two different images for a tab, apply an active image to the tab without applying an inactive tab image.

The image file must be of a type that can be viewed in browser, for example, JPEG or GIF.

To apply images to a tab:

1. Go to the page that contains the tab where you will apply images.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon on the relevant tab.
4. Enter the name and location of the image you want to use as the active tab image in the **Active Tab Image** field, for example:

```
c:\webimages\maintab_on.gif
```

Alternatively, click **Browse** to locate and select the file.

Note: If the tab rollover effect has been enabled for the region, the active tab image is also used to create the rollover effect—that is, the active tab image displays when the user moves the mouse pointer over the tab.

5. Enter the name and location of the image you want to use as the inactive tab image in the **Inactive Tab Image** field, for example:

```
c:\webimages\maintab_off.gif
```

Alternatively, click **Browse** to locate and select the file.

Note: You need to provide an inactive tab image only if you want the tab to look different when it is not the currently selected tab, or if you want to use a rollover effect.

6. Click **OK** to return to page.

Tip: If you want to check the result before you return to the page, click **Apply** rather than **OK**.

To delete a tab image, click the **Delete** icon next to the image. (This icon displays only when there is a tab image.)

7.5.3.8 Adding a Rollover Effect to Tabs

With a rollover effect, the image that displays with an object switches to a different image when users move their mouse pointers over the object. You can add a rollover effect to a tab by enabling the rollover effect in the tab region and applying active and inactive images to the tabs.

You can enable the rollover effect only in a region that already contains at least one tab.

To add a rollover effect to a tab:

1. Go to the page where you will add a rollover effect to a tab.

For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).

2. Switch to **Edit** mode.
3. Click the **Edit** icon of the relevant region.

Note: Be sure to click the icon for the tabbed region itself (that is, the icon to the side of the tabs), rather than in a region within the tab.

4. Go to the **Region Display Options** section, and select **Use Rollover Effect For Tab Images**.
5. Click **OK** to return to the page.
6. Edit each tab to specify active and inactive images.

Note: The active tab image is used as the rollover image—that is, the active tab image displays when the user moves the cursor over the tab.

7.5.3.9 Deleting a Tab from a Page

If the tab you want to delete includes content, the content is deleted along with the tab. You will not be given an opportunity to move the content during the delete operation. If you want to move the content, make sure you do so before deleting the tab.

Note: To delete a tab from a page, you must have at least the Manage Content privilege on the parent page, that is, the page that hosts the tab, or the tab that hosts the sub-tab.

If you have full customization privileges on a page, you can delete your own tabs when you customize the page; but you cannot delete tabs that you did not add yourself.

Deleting One Tab

To delete a single tab from a page:

1. Go to the page where you will delete a tab.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Actions** icon on the tab you will delete.
4. Click the **Delete** link.
5. In the confirmation page, click **Yes**.

The tab and all of its content are deleted.

Deleting Multiple Tabs Simultaneously

To delete multiple tabs simultaneously:

1. Go to the page where you will delete multiple tabs.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode, **Layout** view.

3. Select the check box of all the tabs you want to delete.
4. Click **Delete**.
5. In the confirmation page, click **Yes**.
All of the selected tabs and their content are deleted.

7.6 Adding Content

This section contains information about how a page designer can add content to a page. It includes the following subsections:

- [Adding Items](#)
- [Adding Portlets](#)
- [Listing the Pages You Can Manage](#)
- [Adding a Navigation Page to a Page](#)
- [Adding Content to a Page Through Automatically Executed Searches](#)

7.6.1 Adding Items

This section provides a general overview of how to add items to your pages. Items include objects such as images, documents, text, and the like. This section includes the following subsections:

- [Adding Items](#)
- [Adding Dynamic Data \(PL/SQL Item\)](#)
- [Uploading Multiple Files Using Zip Files](#)



The types of items you can add to a page depend on the item types allowed in the page's parent page group. These are specified when the page group is configured (via page group properties). For more information, see the *OracleAS Portal Configuration Guide* on Portal Center, <http://portalcenter.oracle.com>. Click the **Search** icon in the upper right corner of any Portal Center page.

Note: [Chapter 2, "Publishing Content"](#) and [Chapter 5, "Working with Content"](#) provide additional information about working with items in OracleAS Portal. [Section 6.3.4, "Creating Navigation With Built-In Navigation Item Types"](#) provides detailed information about Built-In Navigation Item types, including how to add them to a page.

7.6.1.1 Adding Items

To add a content item type to a page:

1. Go to the page where you will add an item.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to Edit mode.
3. Click the **Add Item** icon in the region where you will add the item.

Note: If the region already contains portlets, you cannot add items to the region.

4. Select the type of item you will add from the **Content Item Types** list or from the **Built-In Navigation Item Types** list.
5. Click **Next**.
6. Enter values for item attributes as required.
Different item types carry different item attributes. For example, for a File or Image item type, you click **Browse** to locate and select the item from your file system; for a Text item type, you enter the relevant text into a text window. You'll find additional information about valid values for each attribute by clicking the **Help** icon on the relevant Portal page.
7. Click **Finish** to save your changes and return to the page.

7.6.1.2 Adding Dynamic Data (PL/SQL Item)

Use the following steps to add PL/SQL code that executes a PL/SQL procedure and displays the results on a page.

To add a PL/SQL item to a page:

1. Go to the page where you will add the PL/SQL item.

If you do not see the page that you want to work with, you may not have the appropriate page access privileges. See your page group administrator to gain access.

For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).

2. Switch to **Edit** mode.
3. Click the **Add Item** icon in the region where you will add the PL/SQL item.

Note: If the add item icon does not display next to the region, the region may be a portlet region (and may contain portlets). In this case, you cannot add items to this region.

4. from the **Content Item Types** list, choose **PL/SQL**.

Note: You can also choose a custom item type that is based on the PL/SQL item type.

If an item type does not appear in the list, contact your page group administrator. Your administrator selects which item types to display here. If you are the administrator or have administrative privileges, you can click the **configure the list of available item types** link on this page and configure the page group to include this item type.

5. Click **Next**.
6. In the **PL/SQL Code** field, enter the PL/SQL code that executes when this item is clicked.
7. In the **Display Name** field, enter the item's link text.

This is what users will click to view the item.

Note: Steps 8 through 16 are optional.

These attributes may not appear on this page. Item attributes, such as Author, Description, Image, New Item Indicator, and so on, are included in the Add <Item> page only if the item type has been configured to include them. For more information, see [Chapter 5, "Working with Content"](#).

8. Choose a category that describes this item, and enter a **Description** for this item.
9. Change the **Publish Date** default to the date and time the item should be published to other users.

The format is DD-MON-YYYY HH12 :MI PM.

When you upload the item, you can see it immediately, despite the **Publish Date** you enter here. Other users will not see this item until the date and time you specify.

10. In the **Expiration Period** field, choose whether you want this item to be always available, available only for a specified number of days (calculated from the publish date), or available up to a specific date and time.

The format is DD-MON-YYYY HH12 :MI PM.

11. In the **Perspectives** field, click the **Move** icons to move a perspective from the **Available Perspectives** to the **Displayed Perspectives** list.

Use the up and down arrows to set the order that the perspectives are displayed.

Note: You can choose more than one perspective for an item. For example, a sales report might belong to both the Sales Representative and Marketing Manager perspectives.

You can select multiple perspectives by holding the Ctrl key while clicking each perspective you want.

Move the mouse pointer over the **Move** icons to get hint text.

12. In the **Image** field, enter the location of the image that you want to associate with this item.

Use the first field to enter or browse for the image on your file system. Alternatively, use the second field to enter the URL of an image, or reuse an image that has already been uploaded to the portal. To reuse an image that has been uploaded to OracleAS Portal, enter its internal name (not file name) without a path in this field, for example, enter 1645.GIF.

To obtain the internal name OracleAS Portal has assigned to an image, go to a place within your portal where the image is already in use; right click it; and select **Properties** from the right-click menu.

13. In the **Image Alignment** list, choose how you want the item's image aligned in the page area.

For descriptions and examples of image alignment options, see [Table 6-5](#).

14. Enter a keyword to locate this item in a basic search, and enter a name for the author.

Note: By default, the **Author** field is filled with the name of the initial logged on user.

15. Select **Enable Item Check-Out** to enable users to check this item into and out of the portal.

16. In the **Display Options** field, choose how you want the PL/SQL item to display in the page area. Choose from:

- **Item Displayed Directly In Page Area** to display the execution results in the portlet region that hosts this item.
- **Link That Displays Item In Full Browser Window** to replace the displayed page with the execution results.
- **Link That Displays Item In New Browser Window** to display the execution results in a second browser window.

17. In the **PL/SQL Execute Options** field, choose the database schema in which to execute this PL/SQL item: the Public schema, the schema belonging to the item's creator, or another schema.

18. Click **Finish** to save your changes and return to the page.

A PL/SQL item is executed as the user who created the item. Therefore, only the user who created a PL/SQL item may edit the item. Even page owners or users

with the Manage Items privilege may not edit PL/SQL items that they did not create.

7.6.1.3 Uploading Multiple Files Using Zip Files

OracleAS Portal offers a couple of ways you can make good use of Zip files:

- You can upload a Zip file as the **Content Item Type** *File*, and make it available to users for downloading multiple files at one time.
- You can upload a Zip file as the **Content Item Type** *Zip File*, and unzip it within your portal for a fast upload of many files. If you wish, you can include their directory structure and, in the case of HTML, preserve their relative links and images.

This section explains how to make use of Zip files in your portal. It includes the following subsections:

- [Preparing Zip Files for Upload](#)
- [Adding a Zip File to a Page](#)
- [Extracting a Zip File Within OracleAS Portal](#)

7.6.1.3.1 Preparing Zip Files for Upload You can upload a Zip file as a *File* item type or a *Zip File* item type.

When you add an item as a Zip file, you can upload compressed files from your computer to pages in OracleAS Portal. Users with the appropriate security privileges can upload compressed files of virtually any size or quantity.

Each extracted file in the Zip file is displayed in the page area as an item link. By creating descriptive file names before zipping files to be uploaded, you can provide meaningful link names to guide users to the file.

Uploaded files are accessible through automatically created links in the page area:

- If you do not include path information in your Zip file, links for the uploaded pages display in a single page that you specify.

To upload files without path information, when you create the Zip file, clear the **Include sub-pages** and **Save Extra Page Info** check boxes.

- If you include path information in your Zip file, links for each level are displayed in a common page for each level.

To upload path information, when you create the Zip file select **Include sub-pages** and **Save Extra Page Info**. The relative locations of your files when you zip them are the relative locations they have when uploaded.

- If you are uploading an HTML file with a title, the text between the `<TITLE></TITLE>` tags becomes the item's display name link.

You can associate categories and perspectives with any uploaded file. Once associated, both categories and perspectives are retained by uploaded files, even if those files are overwritten with newer files of the same name. However, categories and perspectives are not maintained if item version control is enabled and when the **Create New Version** option is selected for uploaded files.

7.6.1.3.2 Adding a Zip File to a Page

To add a Zip file that you will unzip within Portal:

1. Go to the page where you will add a Zip file.

If you do not see the page that you want to work with, you may not have the appropriate page access privileges. See your page group administrator to gain access.

For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).

2. Switch to **Edit** mode.
3. Click the **Add Item** icon in the region where you will add the Zip file item.

Note: If the add item icon does not display next to the region, the region may be a portlet region (and may contain portlets). In this case, you cannot add items to this region.

4. from the **Content Item Type** list, choose **Zip File**.

Note: If you do not see Zip File in the list, the page group that owns the page may not allow Zip files to be uploaded, or your administrator may not have selected this item type to display here. Contact your page group administrator for more information. If you are the administrator or have administrative privileges, you can click the **configure the list of available item types** link on this page and configure the page group to include this item type.

5. Click **Next**.
6. In the **File Name** field, browse for or enter the pathway to the file (including the file name).
7. In the **Display Name** field, enter the item's link text. This is what users click to view the item.
8. Click **Finish** to upload the Zip file and return to the page.

Item attributes such as Author, Description, Image, New Item Indicator, and so on are available on the Add <Item> page only if the item was configured to include them. For more information, see [Chapter 5, "Working with Content"](#).

7.6.1.3.3 Extracting a Zip File Within OracleAS Portal To extract the contents of a Zip file to a page:

1. Add the Zip file to the page as described in [Section 7.6.1.3.2](#).
2. Click the **Unzip** link next to the Zip file.
3. Click the **Browse** icon next to the **Target Page** field, and select a page, or a tab on a page, on which you want to display the content of the Zip file.
4. (Optional) Select **Run Unzip In Background** to run the extraction process in the background.

If you clear this check box, you will remain on this page until the content of the Zip file have been extracted to the target page.

Note: If the **Run Unzip in Background** option does not function properly, your system administrator may need to set `JOB_QUEUE_PROCESSES` in the `init.ora` file to greater than one.

5. In the **Item Type** section, select the type of items that you would like to create for the different types of files in the Zip file.

Note: If items with the same name already exist, and you plan to choose **Overwrite Existing Files** or **Create New Version** in step 6, the item type of the extracted files will be the same as the existing files rather than the item type specified here.

For example, you can specify that all of the images in your Zip file will be extracted as File items instead of Image items.

- a. If your Zip file contains document files, such as *.doc, *.pdf, or *.htm, select an item type for these files in the **File** list.

When the Bulk Load process is complete, an item of the type you selected is added in the target page for each file.

Note: The list of item types may include File, Simple File, Zip File, and custom item types based on file item types.

- b. If your Zip file contains image files, such as *.gif and *.jpg, select an item type for these files in the **Image** list.

When the Bulk Load process is complete, an item of the type you selected is added in the target page for each file.

Note: The list of item types may include Image, Simple Image, Simple Image Map, File, Simple File, Zip File, and custom item types based on image item types.

- c. If your Zip file contains other Zip files that do not end with a *.zip extension, select an item type for these files in the **Zip File** list.

When the extraction process is complete, an item of the type you selected is added in the target page for each file.

If your Zip file contains other Zip files that do end with a *.zip extension, you do not need to select an item type here. Zip File items will be created automatically for each of the files.

Note: The list of item types may include File, Simple File, Zip File, and custom item types based on zip file item types.

- 6. In the **Overwrite Or Rename Files** section, choose whether to overwrite or rename existing files of the same name in the target page.

If item versioning ("Simple" or "Audit") is enabled at the page level on the target page, the **Create New Version** option displays. Choose this to create a new

version of any existing file(s) that have the same name as those files being extracted into the target page.

7. Click **Unzip** to begin the file extraction process.

This process may take several minutes depending on the number and size of the files. Do not extract another Zip file while the extraction process is underway.

If you selected **Run Unzip In Background**, you will return to the page. If you did not select this option, you will remain on the Bulk Load page.

8. After the extraction process is complete, read the **Bulk Load Log** for information on the pages and files created and added.

If you selected **Run Unzip In Background**, you can access the Bulk Load Log after the extraction process is complete by clicking **Unzip** next to the Zip file.

Only Zip files that are added as *Zip File* item types display the **Unzip** link. You cannot extract files from Zip files that are added as *File* or *Simple File* item types.

OracleAS Portal maintains the directory structure in Zip files. If the Zip file contains directories, OracleAS Portal creates sub-pages inside the target page during the extraction process.

7.6.2 Adding Portlets

OracleAS Portal comes pre-packaged with portlets ready for adding to your pages. This section contains information about adding portlets to a page.

For information on the pre-packaged portlets that come with OracleAS Portal, see [Section B.5, "Built-in Portlets"](#).

This section includes the following subsections:

- [Adding a Portlet to a Page](#)
- [Hiding a Portlet in View Mode](#)
- [Rearranging the Order of Portlets in a Region](#)
- [Moving a Portlet to Another Region](#)
- [Sharing a Portlet Across Multiple Pages](#)
- [Deleting a Portlet from a Page](#)

7.6.2.1 Adding a Portlet to a Page

Each portlet region on a page may contain one or more portlets. The steps to add a portlet to a page vary depending on whether you want the portlet to be visible to all users of the page, or just yourself. *Edit* a page for changes other users should see; *customize* a page for changes for just yourself.

Note: To add a portlet to a page, you must have one of the following privileges:

- To add a portlet to the default version of a page that everyone sees (Edit), you must have the Manage Content privilege (or higher).
 - To add a portlet to your own private version of a page, you must have the Customize Portlets (Add Only) privilege (or higher) for the page.
 - Users with Manage Items With Approval privileges cannot add portlets to any page.
-
-

To add a portlet to a page:

1. Go to the page where you will add a portlet.

For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).

If you do not see the page that you want to work with, you may not have the appropriate page access privileges. See your page group administrator to gain access.

2. To add a portlet to the view of the page that all (authenticated) users see, click the **Edit** link to switch to Edit mode.

To add a portlet to your own view of the page, click the **Customize** link to switch to Customize mode.

3. Click the **Add Portlet** icon in the region where you will add a portlet.

Note: If the region already includes items, you cannot add portlets to the region. If you are customizing your own version of the page, and there are no existing portlet regions, you can add a tab to the page, then add a portlet to the tab's default portlet region. For information on adding tabs to a page, see [Section 7.5.3.1, "Adding a Tab to a Page"](#).

4. In the Portlet Repository, enter the portlet name in the **Search** field, and click **Go**.

Alternatively, click the relevant repository links to drill to the portlet's location.

5. To preview a portlet before adding it to your page, click the **Preview** icon next to the name of the portlet.

Note: The **Preview** icon displays only for those portlets that support it.

6. To add a portlet to your page, click the portlet name.

Multiple selects are not supported.

The order of the portlets in the **Selected Portlets** list reflects the order in which they appear on the page. To change the order, highlight the portlet name and use the **Move** icons to the right of the list.

7. Click **OK** to return to the page.

7.6.2.2 Hiding a Portlet in View Mode

In some situations, you may want to hide a portlet from view. For example, you may want to continue work on a portlet before you make it available to other users. If you hide a portlet, other users are not able to see the portlet in View mode; however, you can still access it in Edit mode.

Note: If a portlet is not hidden, it is displayed in View mode to all authorized users and available to all public users if the page is enabled to display to public users.

To hide a portlet in View mode:

1. Go to the page that includes the portlet you will hide.

For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).

If you do not see the page that you want to work with, you may not have the appropriate page access privileges. See your page group administrator to gain access.

2. Click **Edit Page** to switch to **Edit** mode.
3. Click the **Actions** icon beside the portlet you want to hide.
4. Click **Hide** to hide the portlet and return to your page.

7.6.2.3 Rearranging the Order of Portlets in a Region

You can change the order that portlets display in a region. You can change everyone's view of the order (Edit) or just your view (Customize). This section covers editing the region. For information on customizing a region, see [Chapter 1, "Viewing and Customizing Pages"](#).

To rearrange the order of portlets in a region for all users of the page:

1. Go to the page that hosts the portlets you will rearrange.

If you do not see the page you want to work with, you may not have the appropriate page access privileges. See your page group administrator to gain access.

For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).

2. Switch to **Edit** mode.
3. Click the **Rearrange** icon in the region that contains the portlets you will rearrange.
4. In the **Arrange Portlets** list, select a portlet and use the **Move** icons to reposition it in the list.

Repeat this step for all portlets you will rearrange.

5. Click **OK** to save your changes and return to the page.

7.6.2.4 Moving a Portlet to Another Region

You can move portlets to another region on the same page. You can do this so that it affects everyone's view of the portlets (Edit) or just your view (Customize). This section covers editing the region. For information on customizing a region, see [Chapter 1, "Viewing and Customizing Pages"](#).

To move a portlet to another region for all users of the page:

1. Go to the page that hosts the portlet you want to move.

If you do not see the page you want to work with, you may not have the appropriate page access privileges. See your page group administrator to gain access.

For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).

2. Switch to **Edit** mode.
3. Click the **Actions** icon next to the portlet you want to move.
4. Click **Move to another region**.
5. Select a new region, and click **Move Portlet**.

The portlet is moved, and you are returned to the page.

7.6.2.5 Sharing a Portlet Across Multiple Pages

When a portlet is added to a page, a portlet instance is created that stores information about that particular instance of the portlet, including information about customizations made to the portlet. You can share a portlet instance so that the exact same portlet (including all of your customizations) can be used on another page. This means that when a user customizes the portlet instance on a page, those customizations are reflected on all other pages that include the shared portlet instance. Users do not have to make the same customizations to multiple instances of the same portlet.

For example, there are two versions of the same page: a standard page for use on desktop machines and a mobile page for use on mobile devices. You could share the portlets on the standard page and then add those shared portlet instances to the mobile page. That way, the user just needs to customize the portlets on the standard page, and those same customizations will automatically apply to the portlets on the mobile page.

You can share only portlets; you cannot share items or tabs.

Sharing One Portlet

To share a single portlet:

1. Go to the page that hosts the portlet you will share.

For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).

2. Switch to **Edit** mode.

3. Click the **Actions** icon next to the portlet you will share.
4. Click **Share Instance**.
5. In the confirmation page, click **Yes** to share the portlet instance and return to the page.

In Edit mode, the text *Shared* appears next to the portlet.

Sharing Multiple Portlets

To share more than one portlet:

1. Go to the page that hosts the portlets you will share.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode, **Layout** view.
3. Select the check box next to all the portlets that you want to share.
4. Click **Share**.
5. Click **Yes** in the confirmation page to share the portlets you have selected and return to the page.

Adding a Shared Portlet Instance to a Page

To add a shared portlet instance to a page:

1. Go to the page where you will add a shared portlet instance.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Add Portlets** icon in the region where you want to add the shared portlet instance
4. Click the **Shared Portlets** link in the Portlet Repository.

Note: By default, shared portlet instances are located in the **Shared Portlets** page of the Portlet Repository. Your OracleAS Portal administrator may have relocated shared instances. If so, either search for the name of the shared portlet instance, or ask your OracleAS Portal administrator for the new location.

5. Click the portlet name.

6. Click **OK** to return to the page.

When you create a mobile page, if you base the page on an existing page, any portlets on the existing page are automatically shared with the mobile page. However, new portlets are not implicitly shared between a mobile page and the page on which it was based. If you add a portlet to a page that was used as the starting point for a mobile page, that portlet will not appear on the mobile page. If you want the portlet to also appear on the mobile page, you must add it to the mobile page. Additionally, if you want to share any customizations made to the portlet between the two pages, you must explicitly share the portlet on one page, and then add that shared portlet instance to the other page.

If you want users to add a shared portlet instance to a page rather than the portlet itself, make sure access privileges in the Portlet Repository are set up appropriately.

7.6.2.6 Deleting a Portlet from a Page

You can delete a portlet from your personal view of a page (Customize) or from everyone's view of the page (Edit). This section covers editing the region. For information on customizing a region, see [Chapter 1, "Viewing and Customizing Pages"](#).

To delete a portlet from a page for all users of the page:

1. Go to the page that hosts the portlet you will delete.

If you do not see the page that you want to work with, you may not have the appropriate page access privileges. See your page group administrator to gain access.

For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).

2. Switch to **Edit** mode.
3. Click the **Actions** icon beside the portlet you want to delete.
4. Click **Delete**.
5. In the confirmation page, click **Yes** to delete the portlet and return to the page.

7.6.3 Listing the Pages You Can Manage

If you have Manage privileges on one or more pages in a page group, you can easily access them from any page where you have privileges to add a portlet.

Note: To add this portlet so that all authorized users can see it, you must have at least the Manage Content privilege on the page where you will place it.

You can also add the User Managed Pages portlet to your own view of a page if you have the Add-Only Customize Portlets privileges on the page. Customize the page and add the portlet. The list will be visible only when you view the page; other users will not be able to see it.

To add a list of the pages you can manage to a page:

1. Go to the page where you will add the list.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. In the region where you want to add the list, click the **Add Portlets** icon.
4. Enter `User Managed Pages` in the **Search** field, and click **Go**.

Tip: By default, the User Managed Pages portlet is located under the Portal Content Tools page of the Portlet Repository.

5. Click **User Managed Pages** to add it to the Selected Portlets list.
6. Click **OK** to return to the page.
7. In the **User Managed Pages** portlet's header, click the **Customize** link.
8. Change the name of the portlet, if desired, in the **Display Name** field.
For example, you might want to change the portlet header to *My Pages*.
9. In the **Number Of Pages** field, enter the number of pages you want to display.
Leave the field blank to display all the pages on which you have Manage privileges, up to a maximum of 99999.
10. In the **Order By** list, choose either:
 - **Display Name** to order the pages alphabetically from A to Z
 - **Creation Date** to order them from the most recently created to the oldest

Note: When you order by creation date, the portlet lists display names in creation order, rather than listing creation dates.

11. Click **OK** to return to the page.

7.6.4 Adding Content to a Page Through Automatically Executed Searches

To automatically add content to a page, add a Custom Search portlet and then customize the portlet to search by particular criteria. If the Custom Search portlet is set up to perform an automatic query, all of the items belonging to the selected criteria are automatically displayed when the portlet is displayed. Every time the page displays, the search is refreshed. This means that as content that matches the search criteria is added to your portal, it is automatically published to the Custom Search results. The page remains current with all relevant material.

With Custom Search results, normal security-checking is imposed. Therefore, only those items the user is authorized to see are displayed. This may not include every item that otherwise matches the search criteria.

For detailed information about placing and configuring a Custom Search portlet, see [Section 7.7.3, "Working with the Custom Search Portlet"](#).

7.6.5 Adding a Navigation Page to a Page

To provide consistent navigation throughout a page group, you can create a navigation page and add it to every page in the page group (or to your page template).

To add a navigation page to a page, the navigation page must be published as a portlet. You'll find information on publishing a page as a portlet in [Section 7.3.4, "Publishing a Page as a Portlet"](#). For information on creating a navigation page, see [Section 6.3.2, "Creating a Navigation Page"](#).

To add a navigation page to a page:

1. Go to the page where you will add navigation.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Add Portlets** icon in the region where you will add a navigation page.

4. In the Portlet Repository, enter the name of the navigation page in the **Search** field and click **Go**.
5. In the **Portlet Repository Search Results**, click the navigation page name.
6. Click **OK** to return to the page.

Tip: You might want to edit the properties of the region that hosts the navigation page. For example, you may want to change the region width to improve the way the navigation page looks on the page. To edit region properties, click the **Edit** icon above the relevant region. For more information, see [Section 7.5.2, "Configuring Region Display Options"](#).

7.7 Adding Search Functionality

OracleAS Portal offers a number of options for adding search engines to your pages. You can add a Basic, Advanced, Custom, or Ultra Search. A Basic search matches results with search criteria entered into the Search field. An Advanced Search is a Basic Search with additional capabilities, such as the ability to limit the search to a specific page group, a specific category, and so on. Use Custom Search to create an automatically executed search whose results dynamically populate the search results page.

A pre-built Ultra Search portlet is also available. It provides crawling and universal search over all Ultra Search-supported repositories. It includes the ability to search the content of OracleAS Portal. To make use of the pre-built Ultra Search portlet, OracleAS Portal must be registered as an Ultra Search content source, and the Ultra Search provider must be registered with OracleAS Portal.

Note: If the Ultra Search portlet is not available in your portlet repository, contact your portal administrator. For more information on how to set up Ultra Search, see the *OracleAS Portal Configuration Guide* on Portal Center, <http://portalcenter.oracle.com>. Click the **Search** icon in the upper right corner of any Portal Center page.

For custom searches, you can display search results in the same portlet you used to submit the search criteria, and you can place two Custom Search portlets on two different pages—one for submitting search criteria and one for displaying results. This has implications for the set-up values specified for each portlet.

This section explains how to use OracleAS Portal's search features and includes a discussion of the options that are shared and not shared when Custom Search criteria and results are provided in two separate portlets. It includes the following subsections:

- [Placing a Search Portlet on a Page](#)
- [Editing Basic or Advanced Search Portlet Defaults](#)
- [Working with the Custom Search Portlet](#)



Refer to the *OracleAS Portal Configuration Guide* for additional information on setting up a search feature in Portal. You'll find this guide on Portal Center, <http://portalcenter.oracle.com>. Click the **Search** icon in the upper right corner of any Portal Center page.

7.7.1 Placing a Search Portlet on a Page

No matter what type of search you will use, the task of placing the search is the same. To place a search on a page:

1. Go to the page where you will place the search portlet.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Click the **Add Portlet** icon in the region that will host the search portlet.
3. In the Portlet Repository, enter search in the **Search** field, and click **Go**.
4. In the **Portlet Repository Search Results**, click the type of search portlet you will add.
5. Click **OK** to save your changes and return to the page.

7.7.2 Editing Basic or Advanced Search Portlet Defaults

When you place a Basic or Advanced Search portlet on a page, you can edit some default portlet settings, including the portlet's banner title and whether a page group selector is displayed. The page group selector allows users to limit their search to one or more specific page groups.



This section discusses the options that are set at the portlet level. You'll find information about setting options at the administrator level in the *OracleAS Portal Configuration Guide*, available on Portal Center at <http://portalcenter.oracle.com>. Click the **Search** icon in the upper right corner of any Portal Center page.

To edit a Basic or Advanced Search portlet:

1. Go to the page that contains the search portlet you want to edit.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Click the **Edit** icon associated with the portlet.
3. Change defaults as desired:
 - Enter a different **Portlet Header Title**. The default is **Basic Search** or **Advanced Search**.
 - Select **Show page group selector** to enable users of this search portlet to choose which page groups are included in a search. Once this option is selected, a **Page Groups** field displays in the portlet. Users click the **Browse** icon next to this field to select one or more page groups.
If this option is not selected, all page groups are searched.
4. Click **OK** to save your changes and return to the page.

Note: When you *edit* a portlet, e.g., through **Edit Defaults**, you make changes to the portlet that affect all views of it. When you *customize* a portlet, you affect just your view of it. You can make the same changes discussed in this section to your personal view of the Basic or Advanced Search portlet by clicking the **Customize** link in the portlet header, provided that a **Customize** link is set to display.

7.7.3 Working with the Custom Search Portlet

The Custom Search portlet included with OracleAS Portal allows page builders to define a variety of searches against information uploaded to your portal. Using this portlet, you can define unique search submission forms, results pages, and predefined search queries that all meet very specific search requirements.



You'll find more information about Custom Search Portlets in the technical note "Using the Custom Search Portlet," on Portal Center, <http://portalcenter.oracle.com>. Click the **Search** icon in the upper right corner of any Portal Center page.

This section provides information on how to work with Custom Search portlets. It includes the following subsections:

- [Placing a Custom Search Portlet on a Page](#)
- [Setting Custom Search Options](#)
- [The Custom Search Form](#)

- [The Custom Search Results Page](#)
- [Creating a Portlet that Executes a Predefined Query](#)
- [Restricting Portal Content from a Custom Search](#)
- [Setting Search Criteria for a Custom Search](#)
- [Defining Separate Portlets for Search Forms and Search Results](#)

7.7.3.1 Placing a Custom Search Portlet on a Page

To place the Custom Search portlet on a page:

1. Go to the page where you will add the Custom Search portlet.

For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).

If you do not see the page that you want to work with, you may not have the appropriate page access privileges. See your page group administrator.

2. Switch to **Edit** mode.
3. Click the **Add Portlet** icon in the region where you will add the portlet.
If the region already includes items, you cannot add a portlet to the region.
4. In the Portlet Repository, enter `custom search` in the **Search** field, and click **Go**.
5. In the **Portlet Repository Search Results** list, click **Custom Search**.

This places the portlet in the **Selected Portlets** list. The order of the portlets in this list reflects the order in which they appear on the page. To change the order of the portlets, highlight the portlet name and use the arrows to the right of the Selected Portlets list.

6. Click **OK**.

The custom search portlet is added to the page.

7.7.3.2 Setting Custom Search Options

With Custom Search configuration, some options affect all Custom Search portlets, and some affect only a particular instance of the portlet. The options that affect all search portlets are set at the administrator level. The options for a particular instance of the Custom Search portlet are set at the portlet level.



This section discusses the options that are set at the portlet level. You'll find information about setting options at the administrator level in the *OracleAS Portal Configuration Guide*, available on Portal Center, <http://portalcenter.oracle.com>. Click the **Search** icon in the upper right corner of any Portal Center page.

To set Custom Search options at the portlet level:

1. Go to the page that contains the Custom Search portlet.

For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).

If you do not see the page that you want to work with, you may not have the appropriate page access privileges. See your page group administrator.

2. Switch to **Edit** mode.
3. Click the **Edit** icon associated with the portlet.
4. Edit the Custom Search options as required.

Five tabs contain the options for the custom search portlet:

- **Portlet Type**—Use the Portlet Type tab to generally define the type of Custom Search portlet you will create. See [Portlet Type Tab](#) for more information.
- **What to Search**—Use the What to Search tab to specify the content type and range of page groups to be searched. See [What to Search Tab](#) for more information.
- **Search Criteria**—Use the Search Criteria tab to enter specific search terms and define filters to further refine your search. See [Search Criteria Tab](#) for more information.
- **Search Form**—Use the Search Form tab to create the search form your users will see when you opt to **Display a search form for users to fill in** (on the Portlet Type tab). See [Search Form Tab](#) for more information.
- **Results Display**—Use the Results Display tab to specify the target location of search results and to select display options, including extra services the page will display and the style to be applied to displayed items. See [Results Display Tab](#) for more information.

5. Click **OK**.

7.7.3.3 The Custom Search Form

This section discusses the options available on the default version of a Custom Search Form and explains how to use those options to create a Custom Search Form. It includes the following subsections:

- [Understanding the Default Custom Search Form](#)
- [Creating a Custom Search Form](#)

7.7.3.3.1 Understanding the Default Custom Search Form When you place the Custom Search portlet on a page, what you get is the default version of the Custom Search Form. You can edit the portlet defaults to display other content in lieu of the form, such as the search results. But the first thing you see, before you edit defaults, is the default version of the Custom Search Form. [Table 7-1](#) lists and describes the elements that make up the default Custom Search Form.

Figure 7-21 *The Default Version of the Custom Search Form (Oracle Text Enabled)*

The screenshot shows a search portlet titled "Search". It features a search input field with a "Search" button to its right. Below the input field is a dropdown menu labeled "Find results that" with the selected option "contain all of the terms". Under the heading "Search In", there are two input fields: "Page Groups" and "Page". To the right of the "Page" field is a checked checkbox labeled "Include Sub-pages". Under the heading "Filter By", there are two radio buttons: "Match All Of The Following" (selected) and "Match Any Of The Following". Below these are two dropdown menus: "Perspective" (set to "Match All") and "Category" (set to "All"). To the right of the "Perspective" dropdown is a partially visible checkbox labeled "Inclu". At the bottom left of the form is a "More Attributes" button. At the bottom of the form, there is a link: "For advice on how to search, read the [Search Tips](#)".

Table 7-1 Options available on the default version of the Custom Search Form

Option	Description
Search field and buttons	<p>Enter the term(s) you will search for. Separate terms with spaces. Enclose phrases in quotation marks.</p> <p>Click the Search button to execute the search.</p>
Find results that	<p>Use this list to specify how rigorously the search results should match the terms entered in the Search field. For example, if you enter three terms, <i>policy, benefit, retirement</i>, and you choose:</p> <ul style="list-style-type: none"> ■ Contain all of the terms, search results must contain all three terms in any order, in any number, as entered or as part of a larger word (i.e., <i>benefit</i> or <i>benefits</i>) ■ Contain any of the terms, search results must contain at least one of the terms and may contain more than one, as entered or as part of a larger word (i.e., <i>benefit</i> or <i>benefits</i>) ■ Contain these terms exactly, search results must contain any of the search terms exactly as specified in the Search field (i.e., a search for <i>benefit</i> will not return <i>benefits</i>)
Page Groups	<p>Use this to limit the range of the search to one or more selected page groups. Click the Browse icon to select from a list of page groups to search. This opens a secondary window where users can move one or more page groups from an Available to a Selected list.</p> <p>Note that searches can be restricted to one or more page groups or pages. When a page is selected, the Page Groups option is ignored.</p>
Page	<p>Use this to select a specific page to search. Clicking the Browse icon opens a secondary window where users may select a page.</p> <p>Note that searches can be restricted to one or more page groups or pages. When a page is selected, the Page Groups option is ignored.</p>
Include Sub-pages	<p>Select this option to include all subpages of the page you selected in the Page field in your search.</p>

Table 7–1 Options available on the default version of the Custom Search Form

Option	Description
Match All/Any Of The Following	Use these options to further restrict your search: <ul style="list-style-type: none"> ■ Select Match All Of The Following to limit search results to only those objects that include all of the attributes and values listed below these options. In the case of the default Custom Search Form, each result must contain all selected Perspectives and Categories. ■ Select Match Any Of The Following to get search results that contain at least one of the attributes and values listed below these options.
Perspective Match All / Match Any []	(Oracle Text enabled only) Specify which perspective(s) should apply to search results. Choose Match All or Match Any to perform a search that matches all/any of the perspectives you select.
Include Sub-perspectives	(Oracle Text enabled only) Select this option to include all sub-perspectives of the perspectives you select.
Perspective Equals []	(Oracle Text disabled) Specify which perspective(s) should apply to the search results.
Category Equals []	Specify which category(s) should apply to the search results.
More Attributes	Click this button to include more attributes in the list of filters, and to define filtering values for those attributes.
For advice on how to search, read the Search Tips	Click this link to open a list of tips for refining a search.

7.7.3.3.2 Creating a Custom Search Form Using the Custom Search portlet, you can create unique search submission forms that meet very specific search requirements. For example, you can determine which actions can be performed by users of the search form and which links, buttons, and headings are displayed on the search form.

To create a custom search form:

1. Go to the page that contains the Custom Search portlet.
 - For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon associated with the portlet.

The Custom Search Edit Defaults page opens. This includes five tabs, which are listed and described below:

- [Portlet Type Tab](#)
 - [What to Search Tab](#)
 - [Search Criteria Tab](#)
 - [Search Form Tab](#)
 - [Results Display Tab](#)
4. Click **OK** to save your changes and return to the page.

Portlet Type Tab

Use the Portlet Type tab to generally define the type of Custom Search portlet you will create. [Table 7-2](#) lists and describes the Custom Search options that are available on the Edit Defaults: Portlet Type tab.

Table 7-2 Custom Search options on the Edit Defaults: Portlet Type tab

Option	Description
Display a search form for users to fill in	This option enables users to see a submission form to enter search criteria. Whether users will be able to enter and select their own search criteria is dependent on how you configure the Search Form Tab.
Automatically display search results	Search results from the predefined custom search will display in the Custom Search portlet in lieu of the Custom Search Form. Users will have no input into what is searched. The search is defined by the option values you specify on the What to Search and Search Criteria tabs.
Cache search results for [] minutes	If users access the Custom Search portlet within [] minutes after the search was executed, they will see a cached version of the original search results.
Do not cache search results	Every time users return to the page where the Custom Search portlet was placed, the search is re-executed and the results are refreshed.
Portlet Header Title	A display title for the Custom Search portlet.

What to Search Tab

Use the What to Search tab to specify the content type and range of page groups to be searched. [Table 7-3](#) lists and describes the Custom Search options that are available on the Edit Defaults: What to Search tab.

Table 7–3 Custom Search options on the Edit Defaults: What to Search tab

Option	Description
Any	<p>Search results will return any portal object that matches the search criteria, whether it be an item, such as a link to a file or image that contains the search term; or a page, category, or perspective that contains the search term.</p> <p>The selection you make here works with your selection for the Choose type of content to search option, which appears on the Search Form tab. Additionally, it is affected by where you choose to display your results.</p> <p>Results displayed in the same portlet:</p> <ul style="list-style-type: none"> ■ When you choose Any and Choose type of content to search, the user can choose whether to search items, pages, categories, or perspectives ■ When you choose Any but not Choose type of content to search, the user can search only for items. ■ When you select a specific type of content, such as a page, category, perspective, or item, Choose type of content to search has no effect. <p>Results displayed on a different page:</p> <p>In this scenario, one Custom Search portlet defines the search submission criteria (the search form). A second Custom Search portlet defines how search results are displayed (the search results). The Search Form portlet and Search Results portlet are on different pages.</p> <ul style="list-style-type: none"> ■ If Any is selected in the results portlet, the content type is determined by the Return Only option setting on the Search Form portlet. It defaults to Items if no type is specified on the Search Form. ■ If a specific content type is selected in the results portlet, the content type selected in the search form portlet is ignored. The user can search for the type selected in the results portlet only. <p>Results displayed from an automatic search query:</p> <ul style="list-style-type: none"> ■ If Any is selected in the results portlet, the content type defaults to Items. ■ If you select a specific content type, results of the content type specified are displayed.
Items	Search results will return links to items only.
Pages	Search results will return links to pages only.

Table 7–3 Custom Search options on the Edit Defaults: What to Search tab

Option	Description
Categories	Search returns all categories that meet the specified search criteria.
Perspectives	Search returns all perspectives that meet the specified search criteria.
Search in all page groups, including newly created page groups	All page groups are included in the search.
Search in selected page groups	Only the page groups you select from the Available Page Groups list and add to the Page Groups to Search list are searched. If you select two or more page groups, only shared attributes may be used for search criteria.

Search Criteria Tab

Use the Search Criteria tab to enter specific search terms and define filters to further refine your search. [Table 7–4](#) lists and describes the Custom Search options that are available on the Edit Defaults: Search Criteria tab.

Table 7–4 Custom Search options on the Edit Defaults: Search Criteria tab

Option	Description
blank field	Enter the term(s) to be searched for. Search terms are not required. For example, if you choose to search for a specific attribute, such as a Create Date, and leave this field blank, all objects within the selected page groups that share that Create Date will display in your search results. On the other hand, if you enter a search term, such as <i>policy</i> , and specify the Create Date, search results will include all objects within the selected page groups that include the word <i>policy</i> and were created on the specified date. Note that if Oracle Text is not enabled, only the objects' metadata, that is, the content of their attributes, is searched.

Table 7-4 Custom Search options on the Edit Defaults: Search Criteria tab

Option	Description
By default, find results that	<p>Indicate how rigorously the search terms you entered into the blank field should be applied to the search. For example, if you enter three terms, <i>policy</i>, <i>benefit</i>, <i>retirement</i>, and you choose:</p> <ul style="list-style-type: none"> ■ Contain all of the terms, search results must contain all three terms in any order, in any number, as entered or as part of a larger word (i.e., <i>benefit</i> or <i>benefits</i>) ■ Contain any of the terms, search results must contain at least one of the terms and may contain more than one, as entered or as part of a larger word (i.e., <i>benefit</i> or <i>benefits</i>) ■ Contain these terms exactly, search results must contain any of the search terms exactly as specified in the Search field (i.e., a search for <i>benefit</i> will not return <i>benefits</i>)
Choose Attributes	Click this link to define which attributes should be considered in the search. A second window opens where you can add or delete attributes to be searched for.
Page Group	Display only. This column displays only if a single page group was selected on the What to Search tab.
Attribute	Display only. The name of the attribute to be available for use as a search criterion, for example, Create Date, Description, Display Name, and so on.
Data Type	Display only. The data type of the attribute.
Restriction	Restrict the attribute's relationship to its default value, such as attribute <i>equals</i> default value, attribute <i>contains all</i> default value, and so on.
Default Value	<p>The default value of the attribute. This column is entitled Value, if Automatically display search results is selected on the Portlet Type tab.</p> <p>There are two special default values: #TODAY#, which is today's date, and #USER#, which is the currently logged on user. Additionally, you can specify #TODAY#+<i>n</i> or #TODAY#-<i>n</i>, where <i>n</i> is an integer. These values are case sensitive.</p> <p>For example, if you want to search for all items created in the last seven days, choose the Create Date attribute, set Restriction to Greater Than, and the Default Value to #TODAY#-7.</p> <p>For auto-queries, if a search term is not specified in the Search For section, at least one attribute must have a value.</p>

Search Form Tab

Use the Search Form tab to create the search form your users will see. The options on this tab are useful when you opt to **Display a search form for users to fill in** (on the Portlet Type tab). [Table 7-5](#) lists and describes the Custom Search options that are available on the Search Form tab.

Table 7-5 Custom Search options on the Edit Defaults: Search Form tab

Option	Description
Search Terms Box	Select this to enable users to enter their own search terms.
Search Terms Restriction Selector	<p>Select this, provided Search Terms Box is selected, to enable users to place additional restrictions on the search terms. For example, if users enter three terms, <i>policy, benefit, retirement</i>, and you have specified:</p> <ul style="list-style-type: none"> ■ Contain all of the terms, search results must contain all three terms in any order, in any number, as entered or as part of a larger word (i.e., <i>benefit</i> or <i>benefits</i>) ■ Contain any of the terms, search results must contain at least one of the terms and may contain more than one, as entered or as part of a larger word (i.e., <i>benefit</i> or <i>benefits</i>) ■ Contain these terms exactly, search results must contain any of the search terms exactly as specified in the Search field (i.e., a search for <i>benefit</i> will not return <i>benefits</i>)
Choose a page group to search	<p>Select this to enable users to choose one or more page groups to search. The page groups that appear on the list on the submission form depend on the options chosen on the What to Search tab. If you chose:</p> <ul style="list-style-type: none"> ■ Search in all page groups, including newly created page groups, the list includes all page groups in your portal ■ Search in selected page groups, the list includes the page groups that were selected on the What to Search tab <p>In both cases, the user can select one or more page groups by moving page groups from the Available list to the Selected list.</p> <p>The heading "Search In" that appears above this field can be hidden using the Subsection headers option described in the Other Options section of this table.</p> <p>Note that searches can be restricted to one or more page groups or pages. When a page is selected, the Page Groups option is ignored.</p>

Table 7-5 Custom Search options on the Edit Defaults: Search Form tab

Option	Description
Choose a page to search	<p>Select this to enable users to identify a page, and, optionally, its subpages, to search.</p> <p>Note that searches can be restricted to one or more page groups or pages. When a page is selected, the Page Groups option is ignored.</p>
Order search results	<p>Select this to enable users to specify how their search results should be organized, for example, by Create Date, Author, and so on.</p> <p>Some of the options in the Order By list may not be applicable to certain search results. For example, the results are ordered by Author and a returned result has no author. In such cases, the particular returned result is ordered by Title.</p> <p>Search results are arranged in ascending order, unless the user ordered by date.</p>
Set number of results per page	<p>Select this to enable users to specify how many results should appear on a page. If the number of results exceeds the value specified here, they are placed on additional pages.</p>
Set maximum number of results	<p>Select this to enable users to limit the number of results returned.</p>
Choose type of content to search (items, categories, perspectives, or pages)	<p>Select this to enable users to specify a results type to return, either categories, perspectives, pages, or items.</p> <p>Assume that your custom search involves two portlets in two different locations: one custom search portlet displays the search form; the other custom search portlet displays the search results. For this option to take effect, the results portlet setting for What type of content should be searched? must be set to Any on the What to Search tab. If it is not, only search results of the chosen content type are returned, and users are not given the option to choose a content type.</p>
Search Tips Link	<p>Select this to add a link to the Search Form that provides users with help on how to set up search criteria.</p>
Advanced Search Link	<p>Select this to add a link to the Search Form that enables users to set up additional search criteria.</p>

Table 7–5 Custom Search options on the Edit Defaults: Search Form tab

Option	Description
Image	<p>Select this to display an image with your Search Form. Choose:</p> <ul style="list-style-type: none"> ■ Default Search Image, to display the default image, a magnifying glass, with the Search Form ■ Custom Image, to display your own selected image with the Search Form <p>This image must be loaded into your portal. Click the Browse icon next to this option's related input field to locate the image file you will use. If your image does not appear on the resulting list, upload it into your portal.</p>
Internet Search Engine Link	<p>Select this to display a link to an external search engine, such as Google or Yahoo, on the Search Form. For more information, see the Administrator Level subsection of Section 7.7.3.2, "Setting Custom Search Options".</p>
Reset Button	<p>Select this to display a button that enables users to reset the search criteria.</p>
Subsection headers	<p>Select this to display group headings for items displayed on the search form, such as Search In, Filter By, and Results Options.</p>
Hidden/Displayed Attributes	<p>Select which attributes to show on the Search Form. The list of attributes available here depend on those chosen on the Search Criteria tab. The order of attributes appears to users in the order you set for the Displayed Attributes list. Reorder this list using the arrow icons to the right of the list.</p>
Allow users to add extra attributes to the search	<p>Select this to enable users to specify additional attribute search criteria. Checking this will display the More Attributes button on the Search Form.</p> <p>If no attributes were selected on the Search Criteria tab, then selection of this option results in the display of a single, empty attribute row on the Search Form.</p>

Table 7–5 Custom Search options on the Edit Defaults: Search Form tab

Option	Description
Allow users to choose Match Any/Match All for attributes	<p>Select this to allow users to set restrictions on attribute searches. Selecting this option places two radio buttons on the form:</p> <ul style="list-style-type: none"> ■ Match All Of The Following, restricts the search to matching all selected attributes ■ Match Any Of The Following, opens the search to matching any one or more of the selected attributes <p>If these options are not displayed on the Search Form, the search will return results that match all the attribute search criteria specified.</p>

Results Display Tab

Use the Results Display tab to specify the target location of search results and to select display options, including extras the page should display and the style of displayed items. Table 7–6 lists and describes the Custom Search options that are available on the Edit Defaults: Results Display tab.

Table 7–6 Custom Search options on the Edit Defaults: Results Display tab

Options	Description
Default Search Results Page (Default when displaying a search form)	<p>Choose this to display the search results on the Default Search Results Page.</p> <p>The Default Search Results Page is specified on the Search Settings page, typically managed by a portal administrator. For more information, see the OracleAS Portal Configuration Guide on Portal Center, http://portalcenter.oracle.com.</p>
Custom Search Results Page []	<p>Choose this to display search results on a page that you specify. To select a page, click the Browse icon next to the input field. The target page must also contain a search portlet.</p>
This Portlet (Only choice when search results are automatically displayed)	<p>Choose this to display search results in the same portlet from which the search was executed. This is the only choice available when you opt to automate your custom search.</p>

Table 7–6 Custom Search options on the Edit Defaults: Results Display tab

Options	Description
Bulk action link	<p>Displays a Bulk Action link along with search results. This allows users to perform actions on multiple objects returned by the search. This link displays only when the search was performed on a single page group. It is not displayed for the Shared Objects page group.</p> <p>Note: This setting applies only to the portlet that is being customized. If your search results are displayed in a portlet different from where your search form is displayed, then be sure to set values for these options in the search results portlet.</p>
Results pagination	<p>Choose this to display the Previous and Next icons and a results summary so users can view search results on a page-by-page basis. If you choose not to paginate results, the number of results returned is limited to the value you enter in the Show a maximum of [] results per page field.</p> <p>Note: This setting applies only to the portlet that is being customized. If your search results are displayed in a portlet different from where your search form is displayed, then be sure to set values for these options in the search results portlet.</p>
Show a maximum of [] results per page	<p>Choose this to specify the maximum number of results returned on a page. This becomes the total allowable number of results returned if Results pagination is not also selected.</p> <p>Note: This setting applies only to the portlet that is being customized. If your search results are displayed in a portlet different from where your search form is displayed, then be sure to set values for these options in the search results portlet.</p>
Save search link with the text []	<p>Choose this to display a save search link with the search results. The text you enter here becomes the link text. The default is Save Search.</p> <p>This enables users to save the defined search criteria and rerun the same search without respecifying.</p> <p>Note: This setting applies only to the portlet that is being customized. If your search results are displayed in a portlet different from where your search form is displayed, then be sure to set values for these options in the search results portlet.</p>

Table 7–6 Custom Search options on the Edit Defaults: Results Display tab

Options	Description
Search form with submission criteria	<p>Choose this to display the Search Form, along with the last-specified search criteria, on the Search Results page. This way, users can adjust the criteria and resubmit the search if it didn't yield the desired result.</p> <p>If search results are to be displayed in a portlet other than the one from which the search was submitted, set the Search Form attributes for both portlets (the submitting portlet and the result portlet). Otherwise, not all attributes that are visible on the Search Form may be visible with the results.</p> <p>This option is not available if the Custom Search is set up as an automatic query.</p> <p>Note: This setting applies only to the portlet that is being customized. If your search results are displayed in a portlet different from where your search form is displayed, then be sure to set values for these options in the search results portlet.</p>
Style	Select a style for <i>items</i> returned as search results. The default is Main Style. This style does not affect the appearance of the portlet itself or the page that hosts the portlet. It only affects the item results, that is, their font style, size, color, and so on.
Available/Displayed Attributes	Select the attributes to include in <i>item</i> search results. Use the Move icons to move them from Available to Displayed Attributes . The order of Displayed Attributes is the order they appear on the Search Results page. Use the Move icons to the right of this list to rearrange the order of display.
Order search results by	<p>Select an order to display search results, that is, by Author, Create Date, Display Name, and so on.</p> <p>If a search returns pages, and Order By is set to Author, the order automatically defaults to order by Title. This is because pages do not have an Author attribute.</p>

7.7.3.4 The Custom Search Results Page

This section discusses the options available on a default search results page and explains how to customize those options to create a custom search results page. It includes the following subsections:

- [Understanding the Default Search Results Page](#)
- [Creating a Custom Search Results Page](#)

7.7.3.4.1 Understanding the Default Search Results Page The Search Results Page displays the results of a search as well as any number of other services you may care to include. The objects displayed in the default Search Results page (Figure 7–22) are listed and described in Table 7–7.

Figure 7–22 The Default Search Results Page

Oracle Application Server Portal Search Results Page [Home](#) [Help](#)
[Customize](#)

Items Pages Categories Perspectives

Results: Items 1 - 2 of 2 [Save Search](#)

[Rules of the Road](#)

Create Date: 22-JAN-2003 Page Group: [jonze](#) [Tools](#) [Executives](#)

[The Complete Book of What to Do](#)

Create Date: 22-JAN-2003 Page Group: [jonze](#) [Tools](#) [Executives](#)

the of

Find results that

Search In

Page Groups

Page Include Sub-pages

Filter By

Match All Of The Following Match Any Of The Following

Perspective Equals

Category Equals

For advice on how to search, read the [Search Tips](#)

Table 7-7 Elements of the default Search Results Page

Element	Description
Items tab	<p>This tab displays all returned results that are items. Items include files, images, page links, and the like. Users click a result, and the file is opened, the image is displayed, the link is executed, and so on.</p> <p>This and other tabs display only on search results from manual, rather than automatic, searches.</p>
Pages tab	<p>This tab displays all returned results that are pages. Users click a result, and page is opened.</p> <p>This and other tabs display only on search results from manual, rather than automatic, searches.</p>
Categories tab	<p>This tab displays all returned results that are categories. Users click a result, and a page is opened with a list of all OracleAS Portal objects that are classified under that category.</p> <p>This and other tabs display only on search results from manual, rather than automatic, searches.</p>
Perspectives tab	<p>This tab displays all returned results that are perspectives. Users click a result, and a page is opened with a list of all OracleAS Portal objects that are classified under that perspective.</p> <p>This and other tabs display only on search results from manual, rather than automatic, searches.</p>
Results	<p>This informational field displays the range of results on the current page and the total number of results.</p>
Save Search	<p>Users click this button to save the search criteria specified for the current search. Users have the option of adding a Saved Searches portlet to a page. Any time they click Save Search, the current search criteria are added as a new link in the Saved Searches portlet. In the portlet, they click the link to a particular saved search to rerun the search.</p>
result	<p>The result link jumps to the item, page, or category or perspective list that matches the search criteria.</p>
Information icon	<p>Click this icon to view the properties (attribute values) of a particular result, such as its description, its publish date, or its expiration period.</p>

Table 7-7 Elements of the default Search Results Page

Element	Description
Attributes	These are the attributes that were configured (on the Custom Search Edit Defaults: Results Display tab) to display with each result. On the default Custom Search Results Page, the default attributes include the object's Create Date, its parent page group, and its classification category and perspective(s).
Search Form	The default Search Results Page includes the Custom Search Form so that users may alter the search criteria and rerun the search without having to navigate back to the Custom Search portlet.

7.7.3.4.2 Creating a Custom Search Results Page Using the Custom Search portlet, you can create unique search results pages to meet specific search requirements. For example, you can choose how many results are displayed per page and the style and layout of the results.

The style and layout of search results are controlled by settings on the Custom Search **Edit Defaults: Results Display** tab, and not by settings in the Custom Search Form.

To create a custom search results page:

1. Go to the page that contains the Custom Search portlet.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon beside the portlet.
4. Click the **Results Display** tab.
5. Edit tab options as desired.
For more information, see [Table 7-6](#).
6. Click **OK** to save your changes and return to the page.

The custom search portlet is displayed. When you next perform a search, the results are displayed in format you have specified.

7.7.3.5 Creating a Portlet that Executes a Predefined Query

Using the Custom Search portlet, you can create a portlet that performs a predefined search query and automatically displays the results when the portlet is displayed.

For example, you can create a search portlet that lists items created by a particular user, or one that searches for a list of items that belong to a selected category and that have been modified in the last seven days.

To create a portlet with a predefined search query:

1. Go to the page that contains the Custom Search portlet.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon beside the portlet.
4. On the **Portlet Type** tab:
 - a. To specify that this portlet is to execute a predefined query, select **Automatically display search results**.
With this option, users are not able to enter search submission criteria. Instead, the search results appear when this portlet is displayed.
 - b. To cache the results from the automatic query, enter the length of time in minutes that the portlet content is cached.
The default is 10 minutes.
Select **Do not cache the search results** to disable caching. This means, every time the page that hosts the portlet is called, the search is rerun and the results automatically refresh.
 - c. Change the **Portlet Header Title** if you wish.
5. Click the **What to Search** tab to choose the page groups and content type to be searched:
 - a. For **What type of content should be searched?**, choose whether to search for items, pages, categories, or perspectives.
In an autoquery search, only one content type can be returned; therefore, the option **any of these** does not apply.
 - b. For **Which page groups should be searched?**, choose all, or select a subset of page groups.
For more information see [Section 7.7.3.6, "Restricting Portal Content from a Custom Search"](#).
6. Click the **Search Criteria** tab to define a set of conditions for your search:
 - a. In **Search For**, enter a search term for the automatic query if required.

- b. Select an operator for the query, such as **contain all of the terms**, **contain any of the terms**, **contain these terms exactly**.

If Oracle Text is in use on your portal, there will be a larger set of operators to select from.

- c. Choose which (if any) of the search submission attributes are needed to define your search query.
- d. Enter a **Restriction** and **Default Value** for each selected attribute as required.

If a search term is not specified, at least one attribute must have a value. With autoquery searches, the **Default Value** field is named **Value**.

- 7. Click the **Results Display** tab to define how the results are displayed:

- a. For **Order search results by**, choose the order in which the results are displayed.
- b. Customize how your search results are displayed, as required.

For more information, see [Section 7.7.3.4.2, "Creating a Custom Search Results Page"](#).

- 8. Click **OK** to save your changes and return to the page.

When this custom search portlet is displayed, it executes the search query you have specified and automatically displays the results.

7.7.3.6 Restricting Portal Content from a Custom Search

Using the Custom Search portlet, you can restrict the portal content that can be included in a search. Users may not override the restrictions you define.

For example, you can create a portlet that allows users to search for items only, in one specific page group.

To restrict portal content from a custom search:

1. Go to the page that contains the Custom Search portlet.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon beside the portlet.
4. Click the **What to Search** tab to choose which page groups and content type to include in the search:

- a. For **What type of content should be searched?**, restrict the search to items, pages, categories, or perspectives.

Alternatively, allow any of these.

If the results are to be displayed in a different portlet, and the Search Results Page is set up to display a particular type of content, the setting for the Search Results Page overrides the content type selected in the Search Form. The user can search only for the type of content that is selected in the Search Results Page.

- b. For **Which page groups should be searched?**, move the page group(s) you will include in your search from the Available Page Groups list to the **Page Groups to Search** list.

5. Click the **Search Form** tab:

- a. Select **Choose a page group to search** to allow the user to further restrict which page groups are searched.

The list of available page groups displayed when the user clicks the **Browse** icon are those selected on the **What to Search** tab. If you want the user to always search in all the page groups you have selected, do not select this option.

- b. Select **Choose type of content to search** to allow the user to restrict the search to items, categories, perspectives, or pages.

For this option to take effect, the custom search portlet setting **What type of content should be searched?** must be set to **Any**, on the **What to Search** tab. If it is not, only search results of the chosen content type are returned. The user is not given the option to choose a content type.

6. Click **OK** to save your changes and return to the page.

This instance of the Custom Search Portlet returns search items from the portal content you have defined.

7.7.3.7 Setting Search Criteria for a Custom Search

Using the Custom Search portlet, you can define searches that return results that match a set of predefined conditions. You can predefine a set of conditions if you wish, so that they appear on the search form when it is displayed in the portlet. If your custom search portlet displays a search form, users can override the search criteria that you define.

Alternatively, you may want to hide search conditions from portlet users so they cannot be changed.

For example, you can create a portlet that searches for a list of items in a selected category that have been modified in the last 7 days. If you do not display the category details, the user can only search in the category you specify. If you choose to display the Date Updated attribute, the default is provided, but the user can modify the date as required.

To set search criteria for a custom search:

1. Go to the page that contains the Custom Search portlet.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon beside the portlet.
4. On the **Portlet Type** tab:
 - a. To specify that users of this portlet can enter search criteria, select **Display a search form for users to fill in**.
 - b. Change the **Portlet Header Title** if you wish.
5. Click the **What to Search** tab to choose which page groups and content type to search:
 - a. For **What type of content should be searched?**, choose whether to search for items, pages, categories, perspectives, or any of these.
 - b. For **Which page groups should be searched?**, choose **All**, or select a subset of page groups.

For more information see [Section 7.7.3.6, "Restricting Portal Content from a Custom Search"](#).

6. Click the **Search Criteria** tab to predefine a set of conditions for your search:
 - a. In **Search For**, enter a default search term for the query if required.
 - b. Select a default operator for the query, such as **contain all of the terms**, **contain any of the terms**, **contain these terms exactly**.

If Oracle Text is in use on your portal, there will be a larger set of operators to select from.

6. Choose which (if any) of the search submission attributes are needed to define your search query.

- d. Enter a **Restriction** and **Default Value** for each selected attribute as required.

With autoquery searches, if a search term is not specified, at least one attribute must have a default value.

If Oracle Text is enabled you can choose more than one perspective. You can perform a search that Matches All or Matches Any of the perspectives you select and if you choose Include Sub-perspectives you can extend your search to perspectives beneath the perspectives you have chosen.

7. Click the **Search Form** tab to specify whether users can override the search criteria you have defined:
 - a. Select **Search Terms Box**, to allow users to enter their own search terms.
 - b. Select **Search Terms Restriction Selector**, to allow users to choose their own operator for the search.
 - c. Hide any search attributes that you do not want users to change, by moving them to the **Hidden Attributes** list.
8. Click **OK** to save your changes and return to the page.

The custom search portlet is displayed with your search criteria defined.

7.7.3.8 Defining Separate Portlets for Search Forms and Search Results

You can set up a Custom Search portlet for submitting search criteria and another, separate Custom Search portlet that displays the search results. If you do this, you must configure both portlets. Some configuration values are passed from the search submission portlet to the search results portlet, while others do not. [Table 7-8](#) lists and explains the configuration settings that are passed over and those that are not.

To understand [Table 7-8](#), imagine the following scenario:

- Page A hosts Portlet A, which is used to submit search criteria.
- Page B hosts Portlet B, which is used to display search results from search criteria submitted to Portlet A.

Table 7–8 Sharing of options between Custom Search form and results portlets

Option	Carried Over?	Explanation
Customizations	No	<p>Customizations of a portlet are never carried over to another portlet. Any customizations on Portlet A will not automatically show up on Portlet B. For customizations to apply to both portlets, they must also be made to Portlet B.</p>
Results Settings	No	<p>Results settings that are specified on the Results Display tab (Edit Defaults) apply only to the portlet on which they are set. For example, say you choose to display a Saved Search link on Portlet A, but not on Portlet B. When you submit a search using Portlet A, the Saved Search link is not displayed with search results (on Portlet B).</p> <p>For the Saved Search link to display, it must be specified on the Edit Defaults: Results Display tab in Portlet B.</p>
Search Form Appearance	No	<p>Search form settings and attributes specified on the Search Form tab (Edit Defaults) apply only to the search form on which they are set and not to any search form you might elect to display on your results page.</p> <p>For example, if you select Set maximum number of results on the Edit Defaults: Search Form tab in Portlet A; and you select to display Search form with submission criteria on the Edit Defaults: Search Results tab in Portlet B; when a search is performed from Portlet A, the search form that displays on Portlet B will not automatically include the option to set a maximum number of results (as set on Portlet A).</p> <p>If you want the search form on Portlet B to include options and attributes selected in Portlet A, the same options and attributes must be set on the Search Form tab associated with Portlet B.</p>
Search Criteria	Yes	<p>The specified search criteria, including the search keyword, search attribute values, selected page groups, select perspectives, hits per page, etc. are submitted through Portlet A, and returned through Portlet B.</p> <p>Note, however, that these criteria appear as part of the results and are not automatically included on any search form you elect to include on the results page. For that, you must configure the search form you specify to appear on the results portlet to show these criteria (through the Search Form tab on Portlet B).</p>

Table 7–8 Sharing of options between Custom Search form and results portlets

Option	Carried Over?	Explanation
Search Criteria: Hits per page	Yes	Hits per page is considered search criteria; so if it is used on the search form in Portlet A, the value is used in the search. When no hits per page value is passed as search criteria, then the value specified in the results portlet (Portlet B) is used.
Search Criteria: Max Return	Yes	Max Return is considered search criteria; so if it is on the search form of Portlet A, the value is used in the search. This value is not set in the portlet's Edit Defaults settings (instead, you can allow users to specify a Max Return value); therefore, if none is specified, the number of results returned is not restricted.
Search Criteria: Results/Return type	Yes	Results/Return type is considered search criteria. Conditions affect whether this option is shared: <ul style="list-style-type: none"> ■ The results portlet (Portlet B) only uses values submitted through Portlet A if the option What type of content should be searched?, which appears on the Edit Defaults: What to Search tab, is set to <i>Any</i> on the results portlet (Portlet B). ■ If the results portlet (Portlet B) has its own return type set to, e.g., <i>Items</i>, and the search form (Portlet A) has the return type set to <i>Pages</i>, the <i>Pages</i> setting is ignored and the <i>Items</i> setting is used. ■ If the results portlet (Portlet B) has its return type set to <i>Any</i>, and no results type is specified on the search form (Portlet A), then <i>Items</i> are always searched.

It is also important to understand how page group and perspective selection is resolved when a separate Custom Search portlet is used to display search results and the page groups/perspectives selected on the two portlets do not match.

For example, if you choose page groups (or perspectives) in Portlet A (say PG1 and PG2), but the results Portlet B is configured to search:

- a subset of these (say PG2), then the common page groups are searched, i.e. PG2.
- different page groups (say PG3 and PG4), then result Portlet B settings are used, i.e. PG3 and PG4.

- any page groups (nothing selected), then the search form Portlet A settings are used, i.e. PG1 and PG2.

Similarly, if Portlet A has no page groups selected, then results Portlet B settings are used. The example here describes page group selection, but the behavior is the same for perspective selection.

If you want the results on Portlet B to match the page group/perspective selection in Portlet A, ensure that the options set on Portlet A are a subset or the same as those on Portlet B.

7.8 Defining Information About Pages

Each page presents an opportunity to define useful information about the page. This section discusses some of these opportunities and explains how to put them to use. It includes the following subsections:

- [Defining the Display of Sub-Page Links](#)
- [Selecting Default Portlet and Item Regions](#)
- [Adding Keywords to a Page](#)
- [Specifying a Representative Image for a Page](#)
- [Assigning a Category to a Page](#)
- [Specifying a Page Contact](#)
- [Choosing Default Item Types for Files Uploaded Via WebDAV](#)
- [Setting the Item Versioning Level for a Page](#)
- [Enabling Item Level Security](#)

7.8.1 Defining the Display of Sub-Page Links

If a page will have a sub-page links region, you can define which sub-pages should display in that region and specify whether sub-page links should display in alphabetical order.

Sub Page Display options affect a page only when that page includes a sub-page links region.

To define the display of sub-page links:

1. Go to the page where you will include a sub-page links region.

For information on locating pages, see [Chapter 1, "Viewing and Customizing Pages"](#).

2. Switch to **Edit** mode.
3. Click the **Properties** link next to **Page** in the page toolbar.
Be sure to click the link for the *page* rather than the *page group*.
4. Click the **Optional** tab.
5. Go to the **Sub Page Display** section, and select the sub-page or pages you want to display from the **Available Sub-Pages** list.
6. Click the **Move Right** icon to move your selections to the **Displayed Sub-Pages** list.
7. Use the **Move Up** and **Move Down** icons to the right of the **Displayed Sub-Pages** list to rearrange the sub-pages into your preferred display order.
If you want the displayed sub-pages to be arranged alphabetically, select **Display Objects Alphabetically**. Note that the **Move Up** and **Move Down** icons disappear when you select this option. Any sub-pages you move to the **Displayed Sub-Pages** list will automatically insert themselves in alphabetical order.
8. Click **OK** to save your changes and return to the page.

For additional information about sub-page links regions, see [Section 7.5.2.8, "Setting Sub-Page Links Properties"](#).

7.8.2 Selecting Default Portlet and Item Regions

When users add content to a page by some means other than the Graphical or Layout view of the page, OracleAS Portal must determine the region where the content should be placed. For example, if a user adds an item to a page using a WebDAV client, that user has no way of specifying the region where the item should be placed. To address this scenario, OracleAS Portal lets you specify default item and portlet regions for a page.

You can also select default portlet and item regions at the page template level. Any page based on the template will use the defaults specified in the template. Pages based on templates cannot specify their own default region.

If you do not explicitly select a default item or portlet region, OracleAS Portal selects its own defaults: the second item and portlet regions in the page. The second region is selected, rather than the first, to avoid placing content in regions intended

for navigation elements. If the page does not have an eligible portlet or item region, an undefined region is used as the default region. If an item is added, the undefined region becomes an item region; if a portlet is added, the undefined region becomes a portlet region.

Selecting a Default Region for a Page

To select a default region for a page:

1. Go to the page where you will identify default portlet and item regions.
For information on locating pages, see [Chapter 1, "Viewing and Customizing Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Properties** link next to **Page** in the page toolbar.
Be sure to click the link for the *page* rather than the *page group*.
4. Click the **Regions** tab.
5. From the **Default Region Type** list, choose **Default Portlet Region** or **Default Item Region**.
6. Select the radio button in the region you will identify as the page's default portlet or item region.

Note: You can see radio buttons only in the regions of the type chosen in the **Default Region Type** list. That is, you can only select a portlet region as the default portlet region and an item region as the default item region.

You cannot select an undefined region as a default region. You must edit the region to explicitly make it a portlet or item region first.

7. Click **OK** to return to the page.

Selecting a Default Region for a Page Template

To select a default region for a page template:

1. In the Portal Navigator, click the **Page Groups** tab to bring it forward.
To get to the Portal Navigator, click the **Navigator** link at the top of the Portal Builder. If the link does not display, ask your page group or portal administrator for access to this link.

2. On the resulting page, click the page group that owns the template you will work with.
3. Click the **Templates** node.
4. Click the **Properties** link next to the template you will work with.
5. Click the **Regions** tab to bring it forward.
6. In the **Default Region Type** list, choose **Default Portlet Region** or **Default Item Region**.
7. Select the radio button in the region that you want to use as the page's default portlet or item region.

Note: You can see radio buttons only in the regions of the type chosen in the **Default Region Type** list. That is, you can only select a portlet region as the default portlet region and an item region as the default item region.

8. Click **OK** to return to the Navigator.

7.8.3 Adding Keywords to a Page

When a user performs a search on the portal, the search criteria is compared to each page's display name, description, and keywords. To ensure that users find your page when they are searching the portal, add meaningful keywords to describe the content of the page.

Keywords are also included in the page's META tags, so that they can be searched from the Web.

You can add keywords only to Standard, URL, and PL/SQL pages, or custom pages that are based on these page types.

To add keywords to a page:

1. Go to the page where you will add keywords.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Properties** link next to **Page** in the page toolbar.

Be sure to click the link for the *page* rather than the *page group*.

4. On the Properties page, click the **Optional** tab to bring it forward and go to the **Optional Page Properties** section.
5. In the **Keywords** field, enter the keywords that best describe this page.
Separate keywords with a space.
6. Click **OK** to save your changes and return to the page.

7.8.4 Specifying a Representative Image for a Page

When you include a page in a list of objects, you can specify that an image should be used in lieu of the page's display name to represent the page in the list. You can also specify a rollover image to use when users move a mouse pointer over the page image.

You can specify images only for Standard, URL, and PL/SQL pages or custom pages that are based on these page types.

To specify a representative image for a page:

1. Go to the page where you will specify a representative image.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Properties** link next to **Page** in the page toolbar.
Be sure to click the link for the *page* rather than the *page group*.
4. Click the **Optional** tab to bring it forward, and scroll to the **Page Images** section.
5. In the **Image Name** field, enter the path and file name of an image.

Tip: Optionally, click **Browse** to locate the image.

6. Optionally, enter the path and file name of the rollover image in the **Rollover Image Name** field.

Tip: Optionally, click **Browse** to locate the image.

7. Click **OK** to save your changes and return to the page.

7.8.5 Assigning a Category to a Page

You can assign a category to a page to classify its content. Then your users can perform searches based on those categories to find a particular type of content.

You can categorize only Standard, URL, and PL/SQL pages or custom pages that are based on these page types.

To categorize a page:

1. Go to the page where you will assign a category.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Properties** link next to **Page** in the page toolbar.
Be sure to click the link for the *page* rather than the *page group*.
4. Click the **Optional** tab to bring it forward, and go to the **Optional Page Properties** section.
5. From the **Category** list, choose the category that best describes the purpose or content of the page.
6. Click **OK** to save your changes and return to the page.

7.8.6 Specifying a Page Contact

The page contact is the person for users to contact with questions about the page. Typically, it is a user with Manage privileges on the page. You can provide the page contact e-mail address, and display that address on the page via a Portal Smart Link contact-type item. This section explains how to specify the contact information. For information on how to display the contact information, see [Section 6.3.4.6, "Adding a Portal Smart Link Item"](#).

You can only specify a page contact for Standard pages and custom pages that are based on the Standard page type.

To specify a page contact:

1. Go to the page where you will specify a page contact.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Properties** link next to **Page** in the page toolbar.

Be sure to click the link for the *page* rather than the *page group*.

4. Click the **Optional** tab to bring it forward, and go to the **Optional Page Properties** section.
5. In the **Contact E-mail** field, enter the e-mail address of the page contact, for example:
`scott@mycompany.com`
6. Click **OK** to save your changes and return to the page.

7.8.7 Choosing Default Item Types for Files Uploaded Via WebDAV

When users add files to a portal page using a WebDAV client (for example, Web Folders, Cadaver, or Dreamweaver), items are created in the portal for those files. OracleAS Portal uses the default WebDAV item types that are specified for the portal page where the files are being added to determine what item type to use.

For example:

- If the other items in your page use specific custom item types, you might want to make sure that items added with WebDAV clients also use those custom item types.
- You may want to choose **Zip File** as the default WebDAV item type for Zip files that are added with a WebDAV client. Doing so will enable users to extract Zip files within their portal.
- If you want users to be able to upload Zip files, but not to extract them, you might choose **Simple File** as the default WebDAV item type for Zip files.

To choose default WebDAV item types:

1. Go to the page for which you will identify default WebDAV item types.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Properties** link next to **Page** in the page toolbar.
Be sure to click the link for the *page* rather than the *page group*.
4. Click the **Optional** tab to bring it forward, and go to the **Default WebDAV Type** section.

5. From the **Default Regular Files** list, choose the item type to use for regular files (for example, documents) that are uploaded to a portal page through a WebDAV client.
6. From the **Default Zip Files** list, choose the item type to use for Zip files that are uploaded to a portal page through a WebDAV client.
7. From the **Default Image Files** list, choose the item type to use for image files (for example, gif and jpg files) that are uploaded to a portal page through a WebDAV client.
8. Click **OK** to save your changes and return to the page.

The default WebDAV item types lists include only file-based item types (that is, Simple File, Simple Image, File, Image, Zip File, and some custom item types), and only those file-based item types that are available in the page group that owns the page.

For sub-pages, choose **Inherit from Parent Page** if you want to use the same default WebDAV item types as the page's parent page. For the root page, choose **Use Default** to allow OracleAS Portal to choose a suitable default item type. For example, if you choose **Use Default** for regular files, Portal will use the **File** item type.

7.8.8 Setting the Item Versioning Level for a Page

Item versioning determines what happens to the old version of an item when a new version is added. You can set the level of versioning you want for items in a page group. You can override the page group's item versioning level on individual pages or page templates.

You can override the page group item versioning level only with a higher level. For example, if the item versioning level for a page group is set to **Simple**, you can set the item versioning level for a page to **Audit**, but not to **None**.

You can set the item versioning level only for Standard pages and custom pages that are based on the Standard page type.

To set the item versioning level for a page:

1. Go to the page on where you will set the item versioning level.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Properties** link next to **Page** in the page toolbar.

Be sure to click the link for the *page* rather than the *page group*.

4. Click the **Optional** tab to bring it forward, and go to the **Optional Page Properties** section.
5. In the **Item Versioning** radio group, select:
 - **None** to completely replace the item's previous version when uploading a new version of an item. If you choose this option, none of the item's previous versions are retained in the database
 - **Simple** to offer the content contributor the choice of completely replacing the previous version of the item with the new version or adding a new version of the item that does not touch the previous version. If the contributor chooses the latter, all of the item's previous versions are retained in the database.
 - **Audit** to always create a new version when editing an item. If you choose this option, all of the item's previous versions are retained in the database.

The choices available here depend on the choices made at the page group level. That is, if the item versioning level for a *page group* is set to **Simple**, you will be able to select **Audit** at the *page* level, but not **None**.

6. Click **OK** to return to the page.

7.8.9 Enabling Item Level Security

Item level security provides a means of restricting access to specific items you have uploaded to pages or tabs within your portal. Item level security can be applied to items placed on pages, items placed on tabs, and items placed on pages that are based on a page template; though it cannot be applied (successfully) to items intrinsic to the template—that is, to items that are part of the template itself—even if item level security is turned on for the template and the user has privileges on the item.

The following sections further define item level security and describe how to enable it on a page or a tab. It includes the following subsections:

- [What Is Item Level Security?](#)
- [Enabling Item Level Security for a Page](#)
- [Enabling Item Level Security for a Tab](#)

Note: For information on applying item level security, see [Section 2.3, "Protecting Your Content"](#).

7.8.9.1 What Is Item Level Security?

By default, items inherit the access settings that apply to the page or tab that hosts the item. Only users or groups who are authorized to access a given page or tab can access its items. When you enable item level security for a page or tab, items initially use the same security that is applied to the page or tab. It's up to item owners to grant access to a given item to specific users and/or groups.

Manage and Manage Content page-level privileges override item level security privileges. However, item level security takes precedence over other page-level privileges, such as Manage Style. If a user has Manage Style privileges on a page where item level security is enabled, and item level access privileges have been defined for the items, the user can work with the items based on the item level privileges.

Users may be granted a higher level of access to an item than they have on the page or tab that hosts the item. For example, users may have View privileges on a page or tab, allowing them to look at the page or tab, but not to change it. If an item owner explicitly grants Manage or Edit privileges to users, the users are authorized to edit the item, even though they can do nothing else to other objects on the page or tab.

You can enable item level security only on Standard pages and custom pages that are based on the Standard page type.

Note: There is no relationship between item level security and item versioning. Item level security has to do with who can access an item, and item versioning has to do with how older versions of an item are handled as newer versions are uploaded.

Changes to the access settings of a page template affect all pages that are based on the template. However, if the template allows for the use of access settings that are different from those specified in the template, changes to the page template's access settings do not affect the pages that are based on the template.

7.8.9.2 Enabling Item Level Security for a Page

To enable item level security for a page:

1. Go to the page where you will set up item level security.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Access** link in the page toolbar.
4. Go to the **Access Properties** section, and select **Enable Item Level Security**.
5. Click **OK** to return to the page.

This allows item creators to specify access control for individual items on the page. Item creators have the choice of inheriting access control from the page or setting specific access control for individual items.

7.8.9.3 Enabling Item Level Security for a Tab

To enable item level security for a tab:

1. Go to the tab where you will set up item level security.
For information on locating a page (where the tab is placed), see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon on the tab.
4. On the resulting page, click the **Access** tab to bring it forward.
5. Go to the **Access Settings** section, and select **Specify Access Settings**.
6. In the **Access Properties** section, select **Enable Item Level Security**.

This allows item creators to specify access control for individual items on the tab. Item creators have the choice of inheriting access control from the tab, or specifying specific access control for individual items.

See also, [Section 2.3, "Protecting Your Content"](#) for information on how to grant privileges on an item.

7.9 Setting Up an Approval Chain

This section discusses how to set up a chain of approval through which you can pass documents before they are posted publicly (or to a specified group). It includes the following subsections:

- [Setting Up an Approval Process for a Page](#)

- [Enabling Users to Subscribe to a Page or Item](#)

You'll find additional information related to the Approval and Notification process in [Chapter 2, "Publishing Content"](#).

7.9.1 Setting Up an Approval Process for a Page

Once approvals are enabled for your portal, you can define an approval process. An approval process consists of one or more steps in which a newly created or updated item must be approved before it can be published. When a step in the approval process includes multiple users and/or groups, you can specify whether:

- The notification is sent to that step's approvers one at a time in the specified sequence, and all of the approvers must respond before the item is routed to the next step.
- The notification is sent to that step's approvers all at the same time, and all of the approvers must respond before the item is routed to the next step.
- The notification is sent to that step's approvers all at the same time, and only one of the approvers must respond before the item is routed to the next step.

Approvals can be enabled at the page group and page level. A page-level approval process overrides that of the page group, and sets up an approval process that is unique to the page.

To set up an approval process for a page, two options must be enabled at the page group level: **Enable Approvals and Notifications** and **Override the Page Group Approval Process**. The **Override** option automatically adds an **Approval** tab to the Properties page of all standard pages created in this page group.

For users to receive notice of an approval, they must place a Notifications Portlet on one of their pages. For more information, see [Section 7.6.2, "Adding Portlets"](#).

To set up an approval process for a page:

1. Go to the page where you will define an approval process.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Properties** link next to **Page** in the page toolbar.
Be sure to click the link for the *page* rather than the *page group*.
4. Click the **Approval** tab to bring it forward.
5. Select **Define a New Approval Process for the Page**.

The **Approval Routing List** section now appears.

Note: If you do not select this option, the page uses the approval process defined for the page group.

If you select this option and then do not define an approval process for the page, users with the Manage Items With Approval privilege will be able to add items to the page without requiring approval.

6. In the **Approvers** field in the **Approval Routing List** section, select one or more approvers (users or groups) for the first step of the approval routing list.

Click the **Users** or **Groups** icon to add a user or a group.

Note: Each step of the approval routing list can include both users and groups. Use a semicolon (;) as the separator between multiple users and groups.

Approvers should have at least View privileges on the page that includes the item to be approved.

OracleAS Portal provides the following special approvers:

- **#PAGE_GROUP_MANAGER#:** Any user or group with the Manage All privilege on the page group, or the Manage All global level privilege on all page groups.
- **#PAGE_MANAGER#:** Any user or group with the Manage privilege on the page.
- **#CONTENT_MANAGER#:** Any user or group with the Manage Content privilege, or the higher-level Manage privilege, on the page.

OracleAS Portal uses the Oracle Internet Directory (OID) for identity management, serving as the repository for users and groups. In OID, groups are uniquely identified by their distinguished name (DN). Each group has a unique DN, though many groups can share a common name, in the same way that two people can share a common name, yet have completely different lineage (i.e., John Smith and John Doe). When working within the portal, groups created from within that portal are displayed simply with their common names. However, when the portal references a group from some other location in the OID—such as a group from some other portal associated with the same Identity Management Infrastructure—the DN of the group is displayed to distinguish it from the portal’s locally defined groups.

7. In the **Routing Method for Approvers** list, choose a routing method for the first step of the approval routing list:
 - **One at a time, all must approve (Serial, All)**—This sends the approval to approvers in the step one at a time in the sequence specified. All of the approvers must respond to the approval.

- **All at the same time, all must approve (Parallel, All)**—This sends the approval to approvers in the step all at the same time. All of the approvers must respond to the approval.
 - **All at the same time, only one must approve (Parallel, Any)**—This sends the approval to approvers in the step all at the same time. Only one of the approvers must respond to the approval.
8. Click **Add Step** to continue adding steps to the approval routing list.

For each step, select approvers and a routing method. Each step you add is listed in the **Current Approval Process** section. You can edit existing steps by clicking the list of users and groups, or the **Edit** icon. When you edit a step, the step details are displayed in the routing method section and the **Add Step** button changes to **Update Step**.
 9. Click **OK** when the approval routing list is complete.

An approval routing list is now defined for the page.

If there is an active approval process pending for an item, the approval routing steps for the item can not be reordered. If the approval routing list is changed at the page group or page level, it does not affect the process pending for the item. However, the administrator can still delete routing steps and edit the recipients in individual steps of the pending process (but cannot reorder the steps).

7.9.2 Enabling Users to Subscribe to a Page or Item

You can enable users to subscribe to a page or item so that they can be notified whenever that page or item is updated. Note, however, that subscriptions are not possible unless **Enable Approvals and Notifications** is enabled for the relevant page group.

Although you can add the **Subscribe** link or icon to any page or region at any time. The link or icon is visible only if the page group administrator has enabled approvals and notifications for the page group.

Additionally, to enable users to subscribe to a page, you must have at least Manage Content privileges on the page. To enable users to subscribe to an item, you must have at least Manage privileges on the page that contains the item.

Enabling Users to Subscribe to a Page

To enable users to subscribe to a page:

1. Go to the page you will work with.

For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).

2. Switch to **Edit** mode.
3. Click the **Add Item** icon in an item region.

If the page does not have any item regions, you will need to add a new region to the page and make that region an item region.

Even if there is already an item region in the page, you may want to create a new region at the top of the page specifically for the **Subscribe** link. If the page includes a navigation page, you may want to consider adding the **Subscribe** link to the navigation page instead of the page itself.

4. From the **Built-In Navigation Item Types** list, select **Portal Smart Link**.
5. Click **Next**.
6. In the **Portal Smart Link** list, choose **Subscribe**.
7. If you want to use the default label for the **Subscribe** link, select **Use The Default Display Name**.

Using the default display name means that the display name will be automatically translated if users view the page in a different language.

When you select this check box, the **Display Name** field is cleared.

8. If you want to provide your own label for the **Subscribe** link, enter it in the **Display Name** field.
9. If you want to use an image instead of a label:

- a. Provide the name of the image in one of the **Image** fields:

If you want to upload an image from your file system, click **Browse** to locate and select the image.

If you want to use an image that has already been uploaded, enter the internal name of the image (not file name) without a path, for example, `1645.gif`, in the second field.

To obtain the internal name OracleAS Portal has assigned to an image, go to a place within your portal where the image is already in use; right click it; and select **Properties** from the right-click menu.

If you want to use an image from somewhere else on the Web, enter the image URL in the second field.

- b. In the **Image Alignment** field, choose how you want the image to be aligned within the region.

For descriptions and examples of image alignment options, see [Table 6–5](#) in [Chapter 6](#).

10. Click Finish.

Users can now click the **Subscribe** link to be notified whenever that page is updated. Subscribing to a page automatically subscribes a user to every item on that page.

Users are notified through the My Notifications portlet of the changes to pages or items they have subscribed to. Users must have access to a page that includes the My Notifications portlet. Also, the My Notifications portlet must be set up to display subscription notifications.

Enabling Users to Subscribe to an Item

To enable users to subscribe to an item:

1. Go to the page you will work with.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon in the region you will work with.
4. Click the **Attributes/Style** tab.
5. From the **Available Attributes** list, select **Subscribe**.
6. Click the **Move Right** icon to move the attribute to the **Displayed Attributes** list.
7. Click **Apply**.

It is very important that you click **Apply**. If you do not click **Apply**, any changes that you make to the list of displayed attributes will be lost when you click **Close**.

8. Click **Close**.

Users can now click the **Subscribe** icon next to any item in the region to be notified whenever that particular item is updated.

Users are notified of changes through the My Notifications portlet. Users must have access to a page that includes the My Notifications portlet. Also, the My Notifications portlet must be set up to display subscription notifications.

If you include a Subscribe link on a page template, all the pages that are based on the template will include the link. When users subscribe to the pages, they will receive notifications when the pages and the template itself are updated.

7.10 Improving Page Performance

If you are developing pages that will be accessed frequently, or if you are creating a portal that experiences high traffic, you will probably want to take advantage of OracleAS Portal's caching features. This section describes caching options offered at the page and system level and steps you through changing your caching options. It includes the following subsections:

- [Changing How a Page Is Cached](#)
- [Caching at the System Level](#)
- [Page Caching Options](#)

7.10.1 Changing How a Page Is Cached

After you have used your portal for a while, you may care to take advantage of performance-enhancing features, such as OracleAS Portal's page caching options. This section describes the steps you take to move from one page caching option to another.

To change how a page is cached:

1. Go to the page where you will change caching options.

For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).

2. Switch to **Edit** mode.

3. Click the **Properties** link next to **Page** in the page toolbar.

Be sure to click the link for the *page* rather than the *page group*.

4. Go to the **Page Caching** section of the **Main** tab, and select a page caching option.

See [Section 7.10.3, "Page Caching Options"](#) for a description of each caching option.

5. Click **OK** to save your changes.

7.10.2 Caching at the System Level

The judicious use of system-level caching can significantly boost your portal's performance. System-level caching takes place on the middle tier, where one page is generated for all users rather than being generated uniquely for each user. This can provide a huge benefit for the performance and scalability characteristics of your site. Because the page is generated once for all users, some idiosyncrasies will exist that you can address through page design decisions appropriate to system-level caching.

This section describes some decision criteria for the selection of system-level caching and covers how to set up system-level caching for pages and portlets. It includes the following subsections:

- [When Should You Use System Level Caching?](#)
- [Setting Up System-Level Caching for a Page](#)
- [Setting Up System Level Caching for a Portlet](#)

7.10.2.1 When Should You Use System Level Caching?

System-level caching is best used for objects that do not include sensitive data or other information that you do not want to display to all users. For example, use system-level caching on objects that are not part of an approval process. When approvals are enabled and system-level caching is used, all pending items, rejected items, and deleted rejected items are displayed to all users.

With system-level caching, you get one page/one view, so you'll want to be sure that view is suitable for a wide audience.

In keeping with the idea of one page/one view, use system-level caching for pages that do not need to be available for individual user customizations. Because customizations affect only a particular user's unique view of a page, they are not available when all users share the same view.

Access privileges on objects are enforced on a user-by-user or group-by-group basis; consequently, they are not enforced on objects that are cached at the system level. This is because those objects are rendered once, on the middle tier, rather than many times for each individual user.

In your system-level caching, include portlets suitable for public users. Portlets cached at the system level are run as the public user, and only public data is shown.

You can cache both page metadata and page content at the system level. Such pages include a **Refresh** link that users with the appropriate page privileges can click to

invalidate the page in the cache for all users. Once **Refresh** is clicked, a new version of the page is generated for all users.

Consider omitting the **Edit** link on pages you intend to cache at the system level. When users click that link they will get a runtime error if they do not have the appropriate privileges to enter Edit mode. You can edit the page through the Portal Navigator.

In summary, apply system-level caching to pages and portlets that would properly be available to all users.

Note: To set up system-level caching, you must have at least the Manage Content privilege on the page.

7.10.2.2 Setting Up System-Level Caching for a Page

To set up system-level caching for a page:

1. Go to the page where you will set up system level caching.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Properties** link next to **Page** in the page toolbar.
Be sure to click the link for the *page* rather than the *page group*.
4. On the **Main** tab, go to the **Page Caching** section, and select one of the following system-level page caching options:
 - Cache Page Definition Only At System Level
 - Cache Page Definition And Content At System Level For [] MinutesFor an explanation of these selections, see [Section 7.10.3, "Page Caching Options"](#).
5. Click **OK** to save your changes and return to the page.

7.10.2.3 Setting Up System Level Caching for a Portlet

You can increase your portal performance by specifying system-level caching for a portlet. The portlet is rendered once for all users, rather than many times for each user. This is also a way of getting the benefit of system-level caching on pages that might otherwise not be good candidates for it. You can set up system-level caching for a portlet, independent of how the rest of the page content is cached.

Note, however, that if the page that includes a portlet uses system-level caching, the portlet will use system-level caching as result. In the same way, if this portlet's Web Provider indicates system-level caching for the portlet, this portlet will use system-level caching. In these cases, you do not need to set up system-level caching for the portlet manually (as described here), nor will you be able to change the cache setting.

Note: For a description of system-level caching, see [Section 7.10.3, "Page Caching Options"](#).

To set up system-level caching for a portlet:

1. Go to the page that contains the portlet for which you will set up system-level caching.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Edit** icon next to the portlet.
4. Next to **Portlet Caching**, select **Cache portlet at the system level**.
5. Click **OK** to save your changes and return to the page.

7.10.3 Page Caching Options

[Table 7–9](#) lists and describes all page caching options.

Table 7–9 Page caching options

Option	Description
Cache Page Definition Only	<p data-bbox="651 309 1273 361">Creates a cached copy of the page definition only. The page definition includes:</p> <ul data-bbox="651 378 1182 522" style="list-style-type: none"> <li data-bbox="651 378 1110 404">■ Metadata describing the page structure <li data-bbox="651 418 1182 444">■ Identification of the portlets the page contains <li data-bbox="651 458 986 484">■ Items that exist on the page <li data-bbox="651 498 1015 522">■ Style information for the page <p data-bbox="651 539 715 565">Notes</p> <ul data-bbox="651 583 1313 1343" style="list-style-type: none"> <li data-bbox="651 583 1286 656">■ One copy of the page definition is cached for each user, which can impact storage and performance. Choose this option for pages with highly dynamic content. <li data-bbox="651 673 1313 939">■ This option eliminates the regenerating of the page definition, but does not eliminate portlet validity checks (for validation-based portlets), portlet content retrieval (for expired or invalid portlets), or page assembly. Portlet validity (for validation-based portlets) is checked on each request, unlike expiry-based caching, which only performs these checks when the page has expired. Therefore, this option should only be used when the page contains portlets that must use validation- or invalidation-based caching, or that have short expiry periods. <li data-bbox="651 956 1313 1269">■ When this caching option is selected, the page definition will be cached in both Web Cache and the Portal Cache. If the Web Cache entry is invalidated, the Parallel Page Engine will contact the portal to see if the Portal Cache contains the newest version of the page definition. If the cached definition is valid, the Parallel Page Engine will use the Portal Cache entry to assemble the page. If the Portal Cache entry is not valid, the page definition will be regenerated and both cache entries will be refreshed. Generating the page definition is a CPU-intensive operation that occurs in the Portal database, so either type of caching will help reduce the load on the database. <li data-bbox="651 1286 1313 1343">■ This option is only available for Standard, Mobile, and JSP pages.

Table 7–9 Page caching options

Option	Description
Cache Page Definition And Content For [] Minutes	<p data-bbox="601 284 1282 401">Creates a cached copy of the page definition (as described in the previous option), and caches the assembled page's content, including the rendered content of all portlets, for a specified period of time. This is called expiry-based caching.</p> <p data-bbox="601 406 1282 440">Notes</p> <ul data-bbox="601 446 1282 1237" style="list-style-type: none"><li data-bbox="601 446 1282 505">■ Choose this option for pages with more static content that is unlikely to change within the specified time period.<li data-bbox="601 510 1282 708">■ With expiry-based caching, the fully assembled page is cached in the Portal Cache. Portal also instructs the browser to cache the page. Web Cache is not used to cache the fully assembled page; since only session specific pages can be cached in Web Cache (for security reasons), it would be redundant to cache a page there in addition to caching it in the browser.<li data-bbox="601 713 1282 1020">■ Expiry-based caching ignores the caching options for the individual portlets on the page, so it is possible that some content will be stale when the page is viewed from the cache. However, this option eliminates the need for the page to be dynamically assembled with every request, so it is the best choice for minimizing the load on the Parallel Page Engine and OracleAS Portal middle-tier servers. The Parallel Page Engine always checks the validity of a page definition before serving a page. Therefore, if the page definition changes, OracleAS Portal ensures that the page will be regenerated even if it has not expired.<li data-bbox="601 1025 1282 1159">■ If you select this option, you can include a Refresh link on the page. You can use this link to refresh the page by regenerating it from the database. Only users with the appropriate privileges can use this link. Other users will not see this link.<li data-bbox="601 1164 1282 1237">■ This option is only available for Standard and Mobile pages.

Table 7–9 Page caching options

Option	Description
Cache Page Definition Only at System Level	<p>Creates a single cached copy of the page definition (as described in the first option) for all users. The page definition will be the same for all users. Although this option greatly reduces storage requirements and improves performance, page customizations are not possible given that the page is the same for all users. Consequently, the Customize link and all other customization controls are disabled.</p> <p>Notes</p> <ul style="list-style-type: none">■ Choose this option for pages with highly dynamic content, but only when the ability to customize the page is not required.■ Caching at the system level places a single copy of the page's structure in the system cache for all users. Consequently, all page customization options are disabled.■ With this option, a single copy of the page definition is used to build the page for all users. For this reason, all of the page's links, tabs, and items will be displayed to all users. However, users can still only perform the actions for which they have the appropriate access privileges. For example, if a user does not have the appropriate privileges to access a particular tab, the user will receive an error message when the user clicks the tab.■ This option is only available for Standard, Mobile, and JSP pages.

Table 7–9 Page caching options

Option	Description
Cache Page Definition And Content at System Level For [] Minutes	<p>Creates a single cached copy of the page definition (as described in the first option) for all users, and caches the assembled page's content at the system level, including the rendered content of all portlets, for a specified period of time. This is called expiry-based caching. Although this option greatly reduces storage requirements and improves performance, page customizations are not possible given that the page is the same for all users. Consequently, the Customize link and all other customization controls are disabled.</p>
	Notes
	<ul style="list-style-type: none"><li data-bbox="601 574 1270 696">■ Choose this option for pages with more static content that is unlikely to change within the specified time period, but only when the ability to customize the page is not required.<li data-bbox="601 701 1270 822">■ Caching at the system level places a single copy of the page's structure and content in the system cache for all users. Consequently, all page customization options are disabled.<li data-bbox="601 828 1270 1043">■ With this option, a single copy of the page is displayed to all users. For this reason, all of the page's links, tabs, and items will be displayed to all users. However, users can still only perform the actions for which they have the appropriate access privileges. For example, if a user does not have the appropriate privileges to access a particular tab, the user will receive an error message when the user clicks the tab.<li data-bbox="601 1048 1270 1187">■ If you select this option, you can include a Refresh link on the page. You can use this link to refresh the page by regenerating it from the database. Only users with the appropriate privileges can use this link. Other users will not see this link.<li data-bbox="601 1192 1270 1331">■ For this option, the page runs as a public user for portlets and does not use security for items. Items are displayed, but are only accessible by users who have the appropriate privileges for the items. Portlets only display public content.<li data-bbox="601 1336 1270 1402">■ This option is only available for Standard and Mobile pages.

Table 7–9 Page caching options

Option	Description
Don't Cache	<p>Disables page caching.</p> <p>Notes</p> <ul style="list-style-type: none"> ■ The use of this option may adversely impact portal performance. ■ Dynamic page generation can affect the performance of your portal by placing a heavy load on both the database and the middle-tier. However, you may want to disable page caching in the following circumstances: <ul style="list-style-type: none"> Your page contains PL/SQL items or URL items that are rendered in place (i.e., displayed directly on the page) and that produce dynamic content that must always be up-to-date (a portlet that is not cached or that uses a short expiry would be a better choice for this kind of content). You are concerned that a soft-invalidation event, such as a change to user group membership, may result in a cached version of a page being viewed by an active user who has recently lost his privileges on the page.

7.11 Using Parameters and Events

This section defines parameters and events as they are used in OracleAS Portal and describes how to use them within the Portal user interface. It includes the following subsections:

- [What Is a Parameter?](#)
- [What Is an Event?](#)
- [Adding a Parameter to a Page](#)
- [Passing Values to Portlet Parameters](#)
- [Setting Up Events on a Page](#)



For information on enabling parameters and events in a page group, see [Chapter 4, "Working with Page Groups"](#). For information on how to add parameters and events to portlets, go to <http://portalstudio.oracle.com>.

7.11.1 What Is a Parameter?

This section discusses two types of parameter: page and portlet. A page parameter passes values to a page. A portlet parameter passes values to a portlet.

This section describes how these types of parameters are used in OracleAS Portal and steps you through setting them up through the Portal user interface. It includes the following subsections:

- [What Is a Page Parameter?](#)
- [What Is a Portlet Parameter?](#)

7.11.1.1 What Is a Page Parameter?

Page parameters are used to pass values to a page. Their presence on a page means that the information displayed on a page can be different depending on where the page is called from, or who is viewing the page. For example, a stock ticker portlet could be set up to display a different portfolio depending on who is viewing the page.

You can use parameters in your pages only if the **Enable Parameters and Events** page group setting is enabled. For information on enabling parameters and events in a page group, see [Chapter 4, "Working with Page Groups"](#).

A page parameter can get its value from (in order of precedence):

- The URL used to access the page, for example:

```
http://myportal/mypage?a=1&b=2
```

Parameters are case-sensitive, so if your parameter name is a, entering a=1 will work, but A=1 will not.

- The customized value for the current user
- The default value of the parameter, as specified by the page designer

The following subsections describe these uses of parameters in greater detail:

- [Page Parameters in URL Pages](#)
- [Page Parameters in PL/SQL Pages](#)

7.11.1.1.1 Page Parameters in URL Pages In URL pages, the parameters added to the URL used to access the page are used to pass parameters on to the location specified for the page. For example, if a URL page (myurlpage) is created that points to the following URL:

`http://www.yahoo.com/somepage`

A user accesses the page with the following parameters:

`http://myportal/myurlpage?a=1&b=2`

The following URL is generated:

`http://www.yahoo.com/somepage?a=1&b=2`

7.11.1.1.2 Page Parameters in PL/SQL Pages In PL/SQL pages, the parameters added to the URL used to access the page are used to pass values on to bind variables in the PL/SQL code. For example, if a PL/SQL page (myplsqlpage) is created that contains the following PL/SQL statement:

```
a:=:param1;
```

A user accesses the page with the following parameters:

`http://myportal/myplsqlpage?param1=123`

The bind variable (a) is assigned the value 123.

7.11.1.2 What Is a Portlet Parameter?

Portlet parameters pass values to portlets. This means that the information displayed in a portlet can be specific to a particular page or user. A portlet's parameters are specified in the provider.xml file.

There are two types of portlet parameter: public and private. When a portlet is placed on a page, if the parameters and events page group setting is enabled, its public parameters are displayed to the page designer. The page designer can assign values to the parameters to make the information that is displayed in the portlet specific to the page. The page designer can provide a specific value (constant), a system variable (for example, USER), or a page parameter.

Private parameters are used internally by the portlet, for example, for identifying the current row displayed, or the current tab displayed. Private portlet parameters are not displayed to the page designer.

For example, a stock ticker portlet could have a public portlet parameter (ticker) that accepts a stock symbol as its value. When the stock ticker portlet is placed on a page, the ticker parameter is displayed on the **Edit Page: Parameters** tab. On this tab, the page designer can set the value of the ticker parameter to a specific value, for example, ORCL. When the page is displayed, the portlet shows stock

information for the specified company. Alternatively, the page designer could add a page parameter (e.g., symbol) to the page, and pass that page parameter to the portlet parameter. If the page parameter is customizable, users can set the stock ticker portlet to display stock information for any company they choose.



For information on how to add parameters to your portlets, see the *Portal Developer Kit* on Portal Center, <http://portalcenter.oracle.com>. Click the **Search** icon in the upper right corner of any Portal Center page.

7.11.2 What Is an Event?

An event is something that happens when a link or button is clicked in a portlet. A portlet's events are specified in the provider.xml file. In your pages, you can specify what to do when an event occurs on any of the portlets on that page.

When an event occurs, you can:

- Go to another page, optionally passing values to that page's parameters
- Redisplay the current page



For information on setting up a portlet event handler for your portlets, see the *Portal Developer Kit* on Portal Center, <http://portalcenter.oracle.com>. Click the **Search** icon in the upper right corner of any Portal Center page.

7.11.3 Adding a Parameter to a Page

Page parameters pass values to a page. This means that the information displayed on a page can be different depending on where the page is called from, or on who is viewing the page.

To add a parameter to a page:

1. Go to the page where you will add a parameter.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Properties** link next to **Page** in the page toolbar.
Be sure to click the link for the *page* rather than the *page group*.
4. On the Properties page, click the **Parameters** tab to bring it forward.

If you cannot see the Parameters tab, the **Enable Parameters and Events** page group setting has not been enabled.

5. In the **Parameter Name** field, enter a name for the parameter.
The name must be unique within the page, and can contain up to 200 characters. The name can contain only alphanumeric characters (A-Z, a-z, 0-9) and the underscore (_) character. Do not use spaces or other special characters.
6. Click **Add**.
The parameter is added to the page and you can edit its properties in the **Page Parameter Properties** section.
7. In the **Display Name** field, enter a descriptive name for the parameter.
If you allow users to customize the value of this page parameter (by selecting the **Customizable** check box), the display name appears on the Customize Page: Parameters tab.
The display name can contain up to 4000 characters.
8. (Optional) In the **Default Value** field, enter the value that you want to be assigned to the parameter if no other value is provided.
9. (Optional) Select **Customizable** if you want users who customize the page to be able to provide their own value for the parameter.
10. (Optional) In the **Description** field, enter a description of the parameter.
If you allow users to customize the value of this page parameter (by selecting the **Customizable** check box), the description appears on the **Customize Page: Parameters** tab. Use the description to provide users with hints or an example of what kind of value to provide for the parameter.
11. Click **OK** to save your changes and return to the page.

7.11.4 Passing Values to Portlet Parameters

Portlet parameters pass values to portlets. This means that the information displayed within a portlet can be specific to a particular page or user. A portlet's parameters are specified in the provider.xml file.

You can pass values to portlet parameters only on Standard or Mobile pages or custom pages that are based on the Standard page type.

To pass values to portlet parameters:

1. Go to the page that hosts the portlets to which you will pass parameters.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).

2. Switch to **Edit** mode.
3. Click the **Properties** link next to **Page** in the page toolbar.
Be sure to click the link for the *page* rather than the *page group*.
4. On the Properties page, click the **Parameters** tab to bring it forward.
If you cannot see the Parameters tab, the **Enable Parameters and Events** page group setting has not been enabled.
5. The **Portlet Parameter Values** section lists the portlets that are included on the page and indicates whether those portlets have any parameters.
Click the name of the portlet whose parameters you want to pass values to, to show the parameters.
If you want to show the parameters for all the portlets on the page, click **Expand All**. However, if a portlet does not have any parameters, you cannot expand it in the list.
6. For each portlet parameter:
 - a. In the value type list choose:
 - Null** if you do not want to provide a value for the portlet parameter.
 - Page Parameter** to pass the value of one of the page parameters to the portlet parameter.
 - System Variable** to pass the value of a system variable to the portlet parameter.
 - Constant** to pass a specific value to the portlet parameter.
 - b. In the value field or list:
 - If you are using Internet Explorer:** Choose the page parameter or system variable whose value you want to pass to the portlet parameter, or enter the constant value.
 - If you are using Netscape Navigator:** Enter the name of the page parameter or system variable whose value you want to pass to the portlet parameter, or enter the constant value. If you are not sure of the name of the page parameter or system variable, click and select one from the list provided.
7. Click **OK** to save your changes and return to the page.



For information on adding parameters to a portlet, see the *Portal Developer Kit* on Portal Center, <http://portalcenter.oracle.com>. Click the **Search** icon in the upper right corner of any Portal Center page.

7.11.5 Setting Up Events on a Page

An event is something that happens when a link or button is clicked in a portlet. A portlet's events are specified in the provider.xml file.

You can set up events only on Standard or Mobile pages or custom pages that are based on the Standard page type.

To set up events on a page:

1. Go to the page where you will set up events.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Properties** link next to **Page** in the page toolbar.
Be sure to click the link for the *page* rather than the *page group*.
4. On the Properties page, click the **Events** tab to bring it forward.
If you cannot see the Events tab, the **Enable Parameters and Events** page group setting has not been enabled.
5. Click the name of the portlet you will work with.
If you want to show the events for all the portlets on the page, click **Expand All**; however, if a portlet does not have any events, you cannot expand it in the list.
6. Click the event for which you will specify an action.
7. Select:
 - **Go to Page** to display a particular page when the event occurs
Click the **Browse** icon and select a page to display from the list provided.
 - **Redisplay Page** to ignore the event when it occurs
8. The **Page Input** section lists the page parameters defined for the page you selected in the previous step.
9. For each page parameter:
 - a. In the value type list choose:

None if you do not want to provide a value for the page parameter

Event Output to pass the value of one of the portlet event output parameters to the page parameter when the event occurs

System Variable to pass the value of a system variable to the page parameter when the event occurs

Constant to pass a specific value to the page parameter when the event occurs

- b. In the value field or list:

If you are using Internet Explorer: Choose the event output parameter or system variable whose value you want to pass to the page parameter, or enter the constant value.

If you are using Netscape Navigator: Enter the name of the event output parameter or system variable whose value you want to pass to the page parameter, or enter the constant value. If you are not sure of the name of the event output parameter or system variable, click and select one from the list provided.

10. Click **OK** to save your changes and return to the page.



For information on adding events to your portlets, see the *Portal Developer Kit* on Portal Center, <http://portalcenter.oracle.com>. Click the **Search** icon in the upper right corner of any Portal Center page.

7.12 Protecting Your Content

This section contains information on how to allow or prevent users or groups from viewing information in your portal. It includes the following subsections:

- [Controlling Information Exposure](#)
- [Making a Page Available to Everyone](#)
- [Controlling Access to a Page](#)
- [Page Privileges](#)

7.12.1 Controlling Information Exposure

OracleAS Portal gives you complete control over who can access the information in your portal. Using its features, you can:

- Create pages for non-confidential information, and display those pages to everyone, even users who are not logged on to the portal.
- Create other pages for confidential information and grant access to specific users or groups. Only users who are logged on to the portal and who have specific access to a page, either directly or through a group membership, can view the content of these pages.
- Within the same page, add tabs with sensitive content. You can control access to each tab individually, so that it is visible only if a user is authorized.
- Enable item level security on a page so that content contributors can choose which users or groups will see individual items on that page.
- Apply security at the portlet level to control which users can see individual portlets. If users are not authorized, they will not see the portlet no matter where it is placed.

7.12.2 Making a Page Available to Everyone

You can allow all users to view your page, even users who are not logged on (public users). If you do not make your page available to everyone, only those users with View privileges or higher on the page will be able to view it.

Making a page available to public users allows everyone to view the page only. You will still need to set up privileges for those users and groups that you want to be able to manage, customize, or add content to the page.

If you are creating a sub-page that you want to make available to all users, make sure that its parent page is also displayed to public users.

To make a page available to everyone:

1. In Portal, go to the page you will make available to everyone.

For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).

2. Switch to **Edit** mode.

3. Click the **Properties** link next to **Page** in the page toolbar.

Be sure to click the link for the *page* rather than the *page group*.

4. Click the **Access** tab to bring it forward.

5. Select **Display Page To Public Users**.

6. Click **OK** to save your change and return to the page.

Changing the access settings of a page template affects all pages that are based on that template, unless the template allows page designers to use different access settings for pages that are based on it. This control is on the Access tab of the template's Properties page: **Enable Pages To Have Different Access**.

7.12.3 Controlling Access to a Page

You can determine who has access to a page and to what extent. Keep in mind, however, that page access works in tandem with the global privileges that are set for users and groups. For example, on the Access tab you may explicitly grant View access to a particular page to three users. But there may be many more users who can actually view your page, depending on how many users have been granted View privileges for All Pages.

With respect to page access and customization, it may help to consider two versions of a page: the one that an individual user sees, and the public version of the page. If you are the page designer, you control the extent to which other users can customize your page: whether they can modify the public version, their own private version, or nothing at all.

If a page is based on a template, page designers may not be able to control the access and style of the page. There are two options at the template level that control whether page designers can specify different style and access settings for pages based on the template: **Enable Pages To Have Different Access** and **Enable Pages To Use Different Style**. These must be selected; otherwise, the page access and style settings cannot be changed by page designers.

To control access to a page:

1. Go to the page where you will control access.
For information on locating a page, see [Section 7.2, "Navigating to Pages"](#).
2. Switch to **Edit** mode.
3. Click the **Properties** link next to **Page** in the page toolbar.
Be sure to click the link for the *page* rather than the *page group*.
4. Click the **Access** tab to bring it forward.
5. Select **Display Page To Public Users** if you want everyone, including users who are not logged into the portal, to be able to view the page.
6. Select **Enable Item Level Security** to allow item creators to specify access control for individual items in the page.

This option is available only if the page is a Standard page, or is a custom page that is based on the Standard page type. If you do not select this check box, all the items on the page inherit access control from the page. If you select this check box, item creators have the choice of inheriting access control from the page, or specifying access control for individual items.

For more information, see [Section 7.8.9.1, "What Is Item Level Security?"](#)

7. To explicitly grant privileges to specific users or groups:
 - a. In the **Grantee** field, enter the name of the user or group that you want to allow to access this page.

Optionally, click the **Users** or **Groups** icon, and select from the list provided.

Note: OracleAS Portal uses the Oracle Internet Directory (OID) for identity management, serving as the repository for users and groups. In OID, groups are uniquely identified by their distinguished name (DN). Each group has a unique DN, though many groups can share a common name, in the same way that two people can share a common name, yet have completely different lineage (i.e., John Smith and John Doe). When working within the portal, groups created from within that portal are displayed simply with their common names. However, when the portal references a group from some other location in the OID—such as a group from some other portal associated with the same Identity Management Infrastructure—the DN of the group is displayed to distinguish it from the portal’s locally defined groups.

- b. Choose a privilege level from the list.

Note: The order of privileges in the list is not based on any hierarchy of privileges. For more information, see [Section 7.12.4, "Page Privileges"](#).

- c. Click **Add**.
8. To clear all the Web Cache entries for the page, click **Clear Cache**.

The next time the page is requested, it will be retrieved from the database, not the cache.

For example, if you revoke a user's privileges on the page, the user will still be able to access the page if it is in the cache. If you want to make sure that your changes are applied immediately, clear the page from the cache by clicking this link.

Note: This link is available only if one or more of the Web Cache global settings are enabled.

9. Click **OK** to save your changes and return to the Page.

Use the Privilege list under Change Access to change a user or group's privilege level. Click the **Delete** icon to remove the user's or group's privileges entirely.

Changing the access settings of a page template affects all pages that are based on that template, unless the template allows page designers to use different access settings for pages that are based on it. This control is on the Access tab of the template's Properties page: **Enable Pages To Have Different Access**.

7.12.4 Page Privileges

[Table 7-10](#) lists and describes the various page privilege levels available in OracleAS Portal.

Table 7–10 Page privileges

Privilege	Description
Manage	<p>A user with the Manage privilege can perform any operation on the page. With this privilege you can perform all of the actions listed for the Manage Content privilege (discussed below), as well as control the access and style of the page.</p> <p>Notes:</p> <ul style="list-style-type: none"> ■ For a user with this privilege to change the style of a page, the Allow Privileged Users To Manage Style option must be selected at the page group level. This allows the user to apply a different style when editing the page. If this option is not selected at the page group level, only users with the Manage All or Manage Styles page group privileges can apply a different style for the page. ■ There is a second option for controlling styles at the page group level called Allow Privileged Users To Customize Page Style. When this option is selected, users with at least the Customization (Style) privilege on a page (described below) can apply a different style when customizing the page. ■ If a page is based on a template, users with this privilege may not be able to control the access and style of the page. There are two options at the template level, Enable Pages To Have Different Access and Enable Pages To Use Different Style, which control whether page designers can specify different access and style settings for the page. These must be selected; otherwise, the page access and style settings cannot be changed by users with this privilege.
Manage Content	<p>A user with the Manage Content privilege can add, edit, hide, show, share, and delete any item, portlet, or tab on the page.</p>
Manage Items With Approval	<p>A user with the Manage Items with Approval privilege can add or edit items on the page, but the changes are published only after the defined approval process is complete.</p> <p>Notes:</p> <ul style="list-style-type: none"> ■ Users with this privilege cannot add portlets to a page. ■ This privilege is only available if approvals and notifications are enabled for the page group to which the page belongs. If approvals are enabled, but an approval process is not defined, users with this privilege can add, edit, or copy items on the page without approval. ■ This privilege is not available for mobile pages.

Table 7–10 Page privileges

Privilege	Description
Manage Style	<p>A user with the Manage Style privilege can change the style and region properties of the page.</p> <p>Notes:</p> <ul style="list-style-type: none">■ If a page is based on a template, users with this privilege may not be able to control the style of the page. The template level option, Enable Pages To Use Different Style, controls whether page designers can specify different style settings for the page. This option must be selected, otherwise, the page's style settings cannot be changed by users with this privilege.■ For a user with this privilege to change the style of a page, the Allow Privileged Users To Manage Page Style option must be selected at the page group level. When this option is selected, users with the Manage Style privilege on a page can apply a different style to the page.■ This privilege is not available for mobile pages.
Customize Portlets (Full)	<p>A user with the Full Customize Portlets privilege can change the style of the page, add portlets to the page, and delete, move, hide, or show any portlet on the page.</p> <p>Notes:</p> <ul style="list-style-type: none">■ These changes are visible only to the user who made them. For example, if a user with the Full Customize Portlets privilege deletes a portlet from a page, other users will still be able to see that portlet on the page. Likewise, if a user with the Full Customize Portlets privilege adds a portlet to a page, only that user will see the portlet; other users will not.■ For a user with this privilege to change the style of a page, the Allow Privileged Users To Customize Page Style option must be selected at the page group level. When this option is selected, users with this privilege on a page can apply a different style when customizing the page.

Table 7–10 Page privileges

Privilege	Description
Customize Portlets (Add-Only)	<p>A user with the Add Only Customize Portlets privilege can change the style of the page, add portlets to the page, and remove, hide, or show the portlets that are added.</p> <p>Notes:</p> <ul style="list-style-type: none"> ■ These changes are visible only to the user who made them. For example, if a user with the Add-Only Customize Portlets privilege adds a portlet to a page, only that user will see the portlet; other users will not. ■ For a user with this privilege to change the style of a page, the Allow Privileged Users To Customize Page Style option must be selected at the page group level. When this option is selected, users with this privilege on a page can apply a different style when customizing the page.
Customize Portlets (Hide-Show)	<p>A user with the Hide-Show Customize Portlets privilege can change the style of the page, and hide, show, or rearrange any portlet on the page.</p> <p>Notes:</p> <ul style="list-style-type: none"> ■ These changes are visible only to the user who made them. For example, if a user with the Hide-Show Customize Portlets privilege hides a portlet to a page, that portlet is hidden only for that user; other users will still be able to see the portlet. ■ For a user with this privilege to change the style of a page, the Allow Privileged Users To Customize Page Style option must be selected at the page group level. When this option is selected, users with this privilege on a page can apply a different style when customizing the page.

Table 7–10 Page privileges

Privilege	Description
Customization (Style)	<p>A user with the Style Customization privilege can apply a different style to the page.</p> <p>Notes:</p> <ul style="list-style-type: none"> ■ These changes are visible only to the user who made them. For example, if a user with the Style Customization privilege applies a different style to a page, other users will still see the page with the fonts and colors of the original style. ■ For a user with this privilege to change the style of a page, the Allow Privileged Users To Customize Page Style option must be selected at the page group level. When this option is selected, users with this privilege on a page can apply a different style when customizing the page. ■ If a page is based on a template, users with this privilege may not be able to control the style of the page. The template level option, Enable Pages To Use Different Style, controls whether page designers can specify different style settings for the page. This option must be selected, otherwise, the page's style settings cannot be changed by users with this privilege. ■ This privilege is not available for mobile pages.
View	<p>A user with the View privilege can view the content of the page, but cannot add, remove, show, or hide any of that content.</p>

If a mobile page is created based on an existing standard page, any privileges that are not available for mobile pages are converted:

- Manage Items With Approval becomes Manage Content.
- Manage Style becomes Customize Portlets (Full).
- Customization (Style) becomes View.

Part III

Appendixes

Part III contains the following appendixes:

- [Appendix A, "Page Group Object Privileges"](#)
- [Appendix B, "OracleAS Portal Seeded Objects"](#)

Page Group Object Privileges

This appendix describes the privileges required to perform page group related tasks. It contains the following sections:

- [Required Privileges for Page Group Related Tasks](#)
- [Page Group Privileges](#)
- [Page Privileges](#)
- [Item Privileges](#)

For more information about how security works in OracleAS Portal, see the chapter *Securing Oracle Application Server Portal* in the *Oracle Application Server Portal Configuration Guide*.

A.1 Required Privileges for Page Group Related Tasks

[Table A-1](#) describes the minimum privileges you require to perform various actions on page group objects.

Table A-1 Privileges Required to Perform Page Group Related Tasks

To Perform the Following Task	You Need the Following Privileges
View the content of a non-public page	View privilege on the page or on All Pages.
Add a portlet to your own version of a page and hide, show, rearrange, and delete the portlets that you add	Customize (Add-Only) privilege on the page or on All Pages.

Table A-1 Privileges Required to Perform Page Group Related Tasks

To Perform the Following Task	You Need the Following Privileges
Hide, show, and rearrange any portlet on your own version of a page	Customize (Hide-Show) privilege on the page or on All Pages.
Apply a different style to your own version of a page	Customization (Style) privilege on the page or on All Pages. Note: Users can only apply a different style to their own version of a page if the Allow Privileged Users To Customize Page Style page group property is enabled.
Delete a portlet from your own version of a page or move a portlet to a different region on the page	Customize (Full) privilege on the page or on All Pages.
Add content (items and portlets) to the a page without requiring approval, edit item properties, hide, show, rearrange, and delete items	Manage Content privilege on the page or on All Pages.
Add items to a page that require approval before they are visible on the page	Manage Items With Approval privilege on the page or on All Pages. Note: This privilege is available only if approvals and notifications are enabled for the page group.
Apply a different style to a page	If the Allow Privileged Users To Manage Page Style page group property is enabled: Manage Style privilege on the page or on All Pages. If the Allow Privileged Users To Manage Page Style page group property is disabled: Manage All privilege on the page group or on All Page Groups
Create a page	Manage privilege on the parent page or on All Pages.
Edit the properties of a page, delete a page	Manage privilege on the page or on All Pages.
Add, delete, or edit a region	Manage privilege on the page or on All Pages.
Create, delete, or edit a page template	Manage Templates privilege on the page group or on All Page Groups.

Table A-1 Privileges Required to Perform Page Group Related Tasks

To Perform the Following Task	You Need the Following Privileges
Create delete, or edit an attribute, item type, page type, category, or perspective	Manage Classifications privilege on the page group or on All Page Groups.
Create a page group	Create privilege on All Page Groups
Edit the properties of a page group	Manage All privilege on the page group or on All Page Groups
Delete a page group	Manage All privilege on the page group or on All Page Groups

A.2 Page Group Privileges

Table A-2 lists and describes the various page group privileges.

Table A-2 Page Group Privileges

A User or Group with the Following Privilege:	Can:
Manage All	Perform any task within the page group. The Manage All privilege includes all other page group privileges: Manage Classifications, Manage Templates, Manage Styles, and View. A user with this privilege is called the <i>page group administrator</i> .
Manage Classifications	Create, edit, and delete any category, perspective, attribute, custom item type, and custom page type in the page group. A user with this privilege cannot view the pages in this page group unless he or she also has the View privilege.
Manage Templates	Create, edit, and delete any page template in the page group. A user with this privilege cannot view the pages in this page group unless he or she also has the View privilege.
Manage Styles	Create, edit, and delete any style in the page group, and apply a different style to any page in the page group. A user with this privilege can also view any page in the page group.

Table A-2 Page Group Privileges

A User or Group with the Following Privilege:	Can:
View	View the content of any page in the page group, and preview any externally published portlet in the page group. A user with this privilege cannot add, remove, show, or hide any content within the pages in the page group.

A.3 Page Privileges

Table A-3 lists and describes the various page privileges.

Table A-3 Page privileges

Privilege	Description
Manage	<p>A user with the Manage privilege can perform any operation on the page. With this privilege you can perform all of the actions listed for the Manage Content privilege (discussed below), as well as control the access and style of the page.</p> <p>Notes:</p> <ul style="list-style-type: none">■ For a user with this privilege to change the style of a page, the Allow Privileged Users To Manage Style option must be selected at the page group level. This allows the user to apply a different style when editing the page. If this option is not selected at the page group level, only users with the Manage All or Manage Styles page group privileges can apply a different style for the page.■ There is a second option for controlling styles at the page group level called Allow Privileged Users To Customize Page Style. When this option is selected, users with at least the Customization (Style) privilege on a page (described below) can apply a different style when customizing the page.■ If a page is based on a template, users with this privilege may not be able to control the access and style of the page. There are two options at the template level, Enable Pages To Have Different Access and Enable Pages To Use Different Style, which control whether page designers can specify different access and style settings for the page. These must be selected; otherwise, the page access and style settings cannot be changed by users with this privilege.

Table A-3 Page privileges

Privilege	Description
Manage Content	A user with the Manage Content privilege can add, edit, hide, show, share, and delete any item, portlet, or tab on the page.
Manage Items With Approval	<p>A user with the Manage Items with Approval privilege can add or edit items on the page, but the changes are published only after the defined approval process is complete.</p> <p>Notes:</p> <ul style="list-style-type: none"> ■ Users with this privilege cannot add portlets to a page. ■ This privilege is only available if approvals are enabled. If approvals are enabled, but an approval process is not defined, users with this privilege can add, edit, or copy items on the page without approval. ■ This privilege is not available for mobile pages.
Manage Style	<p>A user with the Manage Style privilege can change the style and region properties of the page.</p> <p>Notes:</p> <ul style="list-style-type: none"> ■ If a page is based on a template, users with this privilege may not be able to control the style of the page. The template level option, Enable Pages To Use Different Style, controls whether page designers can specify different style settings for the page. This option must be selected, otherwise, the page's style settings cannot be changed by users with this privilege. ■ For a user with this privilege to change the style of a page, the Allow Privileged Users To Customize Page Style option must be selected at the page group level. When this option is selected, users with this privilege on a page can apply a different style for the page. ■ This privilege is not available for mobile pages.

Table A-3 Page privileges

Privilege	Description
Customize Portlets (Full)	<p>A user with the Full Customize Portlets privilege can change the style of the page, add portlets to the page, and delete, move, hide, or show any portlet on the page.</p> <p>Notes:</p> <ul style="list-style-type: none">■ These changes are visible only to the user who made them. For example, if a user with the Full Customize Portlets privilege deletes a portlet from a page, other users will still be able to see that portlet on the page. Likewise, if a user with the Full Customize Portlets privilege adds a portlet to a page, only that user will see the portlet; other users will not.■ For a user with this privilege to change the style of a page, the Allow Privileged Users To Customize Page Style option must be selected at the page group level. When this option is selected, users with this privilege on a page can apply a different style when customizing the page.
Customize Portlets (Add-Only)	<p>A user with the Add Only Customize Portlets privilege can change the style of the page, add portlets to the page, and remove, hide, or show the portlets that are added.</p> <p>Notes:</p> <ul style="list-style-type: none">■ These changes are visible only to the user who made them. For example, if a user with the Add-Only Customize Portlets privilege adds a portlet to a page, only that user will see the portlet; other users will not.■ For a user with this privilege to change the style of a page, the Allow Privileged Users To Customize Page Style option must be selected at the page group level. When this option is selected, users with this privilege on a page can apply a different style when customizing the page.

Table A-3 Page privileges

Privilege	Description
Customize Portlets (Hide-Show)	<p>A user with the Hide-Show Customize Portlets privilege can change the style of the page, and hide, show, or rearrange any portlet on the page.</p> <p>Notes:</p> <ul style="list-style-type: none"> ■ These changes are visible only to the user who made them. For example, if a user with the Hide-Show Customize Portlets privilege hides a portlet to a page, that portlet is hidden only for that user; other users will still be able to see the portlet. ■ For a user with this privilege to change the style of a page, the Allow Privileged Users To Customize Page Style option must be selected at the page group level. When this option is selected, users with this privilege on a page can apply a different style when customizing the page.
Customization (Style)	<p>A user with the Style Customization privilege can apply a different style to the page.</p> <p>Notes:</p> <ul style="list-style-type: none"> ■ These changes are visible only to the user who made them. For example, if a user with the Style Customization privilege applies a different style to a page, other users will still see the page with the fonts and colors of the original style. ■ For a user with this privilege to change the style of a page, the Allow Privileged Users To Customize Page Style option must be selected at the page group level. When this option is selected, users with this privilege on a page can apply a different style when customizing the page. ■ If a page is based on a template, users with this privilege may not be able to control the style of the page. The template level option, Enable Pages To Use Different Style, controls whether page designers can specify different style settings for the page. This option must be selected, otherwise, the page's style settings cannot be changed by users with this privilege. ■ This privilege is not available for mobile pages.
View	<p>A user with the View privilege can view the content of the page, but cannot add, remove, show, or hide any of that content.</p>

A.4 Item Privileges

[Table A-4](#) lists and describes the various item privileges that are available when item level security is enabled.

Table A-4 *Item Privileges*

Item Privileges	Description
Manage	A user with the Manage privilege can view the item, edit the item, delete the item, and grant privileges on the item. Note that the Manage privilege does not allow a user to add sub-items under the item. Only users with the Manage Items With Approval or higher privileges on the page can add sub-items.
Edit	A user with the Edit privilege can view the item, edit the item, and delete the item.
View	A user with the View privilege can view the item only

OracleAS Portal Seeded Objects

This appendix lists the seeded portal objects (for example, item types and portlets) that OracleAS Portal provides to help get you started with creating your portal. It contains the following main sections:

- [Built-in Page Groups](#)
- [Base Attributes](#)
- [Base Page Types](#)
- [Base Item Types](#)
- [Built-in Portlets](#)

B.1 Built-in Page Groups

During installation, OracleAS Portal creates some page groups that it needs to accomplish certain tasks. For example, the Portlet Repository, which contains all the portlets from local and remote providers that can be added to pages, is simply a page group. You cannot delete these default page groups. For information about creating your own page groups, see [Section 4.1, "Creating a Page Group"](#).

[Table B-1](#) lists the built-in page groups and explains how they are used:

Table B-1 *Built-in Page Groups*

Page Group	Purpose
Corporate Pages	Contains the default home page.
Portal Design-Time Pages	Contains all the pages used by OracleAS Portal, including the Portal Builder page, search pages, and Navigator pages.

Table B–1 Built-in Page Groups

Page Group	Purpose
Portlet Repository	Contains all the providers and associated portlets registered with the current instance of OracleAS Portal.
Shared Objects	Contains users' personal pages and all the objects that are shared across page groups (for example, the General category).

B.2 Base Attributes

The following attributes are included in OracleAS Portal by default. For information about creating your own attributes, see [Section 5.2.1, "Working with Attributes"](#).

B.2.1 Base Content Attributes

[Table B–2](#) lists the base attributes that can be used to store information about an item or page. For information about how to add these attributes to page and item types, see [Section 5.2.2.2, "Editing a Page Type"](#) and [Section 5.2.3.2, "Editing an Item Type"](#).

Table B–2 Base Content Attributes

Attribute:	Contains:
Author	The name of the author of the item.
Category	The name of the category to which the item or page belongs.
Description	A short text description of the item or page.
Display Name	The display name of the item or page.
Display Option	Information about how the item should be displayed: <ul style="list-style-type: none">■ Item Displayed Directly In Page Area■ Link That Displays Item In Full Browser Window■ Link That Displays Item In New Browser Window
Enable Item Check-Out	Information about whether or not the item can be checked out and checked in. This provides document control, allowing groups of users to edit items and not overwrite each other's work. Users cannot edit items that are checked out by another user.
Expiration Period	Information about how long an item should be displayed on a page.

Table B–2 Base Content Attributes

Attribute:	Contains:
Image	The image associated with the item or page.
Image Alignment	Information about where the item image should appear in the page.
Keywords	Keywords that describe the content or purpose of the item or page. When a user performs a search, the user's search criteria is compared to the keywords to find a match.
Perspectives	The names of the perspectives associated with the item or page.
Publish Date	The date (in the format, DD-MON-YYYY HH12:MI PM) when the item should start being displayed to users.
Rollover Image	The second image associated with the item or page. This image is displayed whenever a user moves the mouse cursor over the original image.

B.2.2 Base Display Attributes

[Table B–3](#) lists the base attributes that can be used to display information about an item or portlet. For information about how to display these attributes on a page, see [Section 7.5.2.10, "Changing the Attributes Displayed in a Region"](#).

Table B–3 Base Display Attributes

Attribute:	Displays:
Associated Functions	Links to functions associated with the item if the item is of a custom type that includes function calls.
Author	The name of the author of the item.
Category	The name of the category to which the item or portlet belongs.
Create Date	The date when the item or portlet was added to the page.
Creator	The user name of the user who added the item or portlet to the page.
Date Updated	The date when the item or portlet was last updated.
Description	The short text description of the item or portlet.
Display Name	The display name of the item or portlet.

Table B-3 Base Display Attributes

Attribute:	Displays:
Display Name Link	<p>The display name of the item or portlet as a link pointing to the item or portlet content.</p> <p>Note: The display name will not be a link if the Displayed Directly In Page Area display option is selected for the item or portlet.</p>
Display Name And Image	<p>The display name and image of the item or portlet as links pointing to the item or portlet content. If the item has both a display name and an image, these will appear next to each other. If the item does not have an associated image, only the display name will appear.</p> <p>Notes:</p> <ul style="list-style-type: none">■ The display name and image will not be links if the Display Directly In Page Area display option is selected for the item or portlet.■ Portlets cannot have associated images, so for portlets only the display name is displayed.
Document Size	<p>The size of the uploaded file.</p> <p>Note: This attribute applies only to File and Simple File items, or items of a type based on the Simple File item type.</p>
Expire Date	<p>The date (in the format, DD-MON-YYYY HH12:MI PM) when the item is due to expire.</p>
Gist	<p>The Gist icon. Users can click this icon to display an overview of the item created by Oracle Text.</p> <p>Note: This attribute displays only if Oracle Text is enabled and only for File and Simple Files items, or items of a type based on the Simple File item.</p>
Help URL	<p>The Help icon. Users can click this icon to display help for the portlet.</p> <p>Note: This attribute is appropriate only for Portlet Repository pages, and displays only if the portlet developer specified a help URL for the portlet.</p>
Image	<p>The image associated with the item. If the item does not have an associated image, nothing is displayed.</p>

Table B-3 Base Display Attributes

Attribute:	Displays:
Image Link	<p>The image associated with the item as a link pointing to the item content. If the item does not have an associated image, nothing is displayed.</p> <p>Note: This image will not be a link if the Item Displayed Directly In Page Area display options is selected for the item.</p>
Image or Display Name Link	<p>The image associated with the item as a link pointing to the item content. If the item does not have an associated image, the display name is displayed instead.</p> <p>Note: The image or display name will not be links if the Item Displayed Directly In Page Area display option is selected for the item.</p>
Image URL	<p>The image icon. Users can click this icon to display a preview of the portlet.</p> <p>Note: This attribute is appropriate only for Portlet Repository pages, and displays only if the portlet developer specified a preview image URL for the portlet.</p>
Item Content	<p>The content of the item if the Item Displayed Directly In Page Area display option is selected.</p> <p>Note: This attribute displays only for Text, Simple Text, and Simple PL/SQL items, or items of a type based on the Simple Text or Simple PL/SQL item types.</p>
Keywords	The keywords associated with the item or portlet.
Last Updated By	The user name of the user who last updated the item or portlet.
Mime Type Image	<p>The image associated with the MIME type of the uploaded file.</p> <p>Note: This attribute displays only for File and Simple File items, or items of a type based on the Simple File item type.</p>
New Item Indicator	<p>The New icon. Users can click this icon to display a list of all the new content in the page group.</p> <p>Note: An item or portlet is considered new for the number of days specified in the page group Icon Display Period setting. See Section 5.6.4, "Displaying the New and Updated Icons". The display period applies to both the New and Recently Updated icons. You cannot set a different display period for the individual icons.</p>
Perspectives	The names of the perspectives associated with the item or portlet.

Table B-3 Base Display Attributes

Attribute:	Displays:
Portlet Content	The portlet itself if the Item Displayed Directly In Page Area display options is selected.
Portlet Id	The id of the portlet. Note: This attribute is appropriate only for Portlet Repository pages.
Portlet Name	The name of the portlet.
Property Sheet	The Property Sheet icon. Users can click this icon to view the properties of an item or portlet.
Provider Id	The id of the provider. Note: This attributes is appropriate only for Portlet Repository pages.
Provider Name	The name of the provider. Note: This attribute is appropriate only for Portlet Repository pages.
Publish Date	The date when the item is published on the page (i.e., when the item is visible to users in View mode).
Score	The Oracle Text relevancy score, rating how each result matches the search words.
Subscribe	The Subscribe or Unsubscribe icon. Users can click the Subscribe icon to subscribe to an item and be notified, via the Notification portlet, when it is updated. Users can click the Unsubscribe icon to unsubscribe from an item to which they had previously subscribed. Note: The Subscribe icon only appears if approvals and notifications have been enabled for the page group.
Themes	The Themes icon. Users can click this icon to display the nouns and verbs appearing most often within an item. Note: This attribute displays only if Oracle Text is enabled and only for File and Simple File items, or items of a type based on the Simple File item type.
Translations	A list of the languages in which the item or portlet is available.

Table B–3 Base Display Attributes

Attribute:	Displays:
Updated Item Indicator	<p>The Recently Updated icon. Users can click this icon to display a list of all the recently updated content in the page group.</p> <p>Note: An item or portlet is consider recently updated for the number of days specified in the page group Icon Display Period setting. See Section 5.6.4, "Displaying the New and Updated Icons". The display period applies to both the New and Recently Updated icons. You cannot set a different display period for the individual icons.</p>
Versions	<p>The Versions icon. Users can click this icon to view other versions of the item.</p> <p>Note: This attribute displays only for items that have multiple versions.</p>
View As HTML	<p>The View As HTML icon. Users can click this icon to view an HTML version of an item.</p> <p>Note: This attribute displays only if Oracle Text is enabled and only for File and Simple Files items, or items of a type based on the Simple File item type.</p>
View As HTML With Highlight	<p>The View AS HTML With Highlight icon. Users can click this icon to view an HTML version of an item with search terms highlighted.</p> <p>Note: This attribute displays only if Oracle Text is enabled and only for File and Simple File items, or items of a type based on the Simple File item type. Additionally, this attribute display only on search results pages.</p>

B.3 Base Page Types

[Table B–4](#) lists the page types that are included in OracleAS Portal by default. For information about creating your own page types, see [Section 5.2.2, "Working with Page Types"](#).

Table B–4 Base Page Types

Page Type	Description
Standard	<p>Displays items and portlets.</p> <p>This page type is included by default in newly created page groups.</p>

Table B-4 Base Page Types

Page Type	Description
URL	Displays the contents of a particular URL. This page type is included by default in newly created page groups.
PL/SQL	Displays the results of executing PL/SQL code.
JSP	Displays the results of executing a JavaServer Page (JSP). Note: JSP access must be enabled for the page group for this page type to be available.
Mobile	Displays items and portlets in a hierarchical tree structure, suitable for viewing on a mobile device. Note: Mobile support and mobile page design must be enabled for the portal for this page type to be available.

B.4 Base Item Types

Table B-5 and Table B-6 list the base item types that are included in OracleAS Portal by default. Table B-7 lists the built-in custom item types. For information about extending these item types to meet your requirements, see [Section 5.2.3.2, "Editing an Item Type"](#). For information about how to create your own item types, see [Section 5.2.3, "Working With Item Types"](#).

Table B-5 Base Content Item Types

Item Type	Description
Base File	Uploads a file and stores it in the page group.
Base Image Map	Uploads an image and allows contributors to identify areas within the image that users can click to go to different URLs.
Base Image	Uploads an image and stores it in the page group.
Base PL/SQL	Executes PL/SQL code and displays the results.
Base Page Link	Links to another page in the portal.
Base Text	Displays text (up to 32KB).
Base URL	Links to another Web page, Web site, or document.

Table B–6 Base Navigation Item Types

Item Type	Description
Portal Smart Link	<p>Adds a smart link (and associated image) to the page. A smart link is a link that users can click to access areas of the portal quickly, such as Account Information, Advanced Search, Contact Information, Help, and Home.</p> <p>This item type is included by default in newly created page groups.</p>
Login/Logout Link	<p>Adds a links and/or icon to the page that users can click to log in or log out of the portal.</p> <p>This item type is included by default in newly created page groups.</p>
Basic Search Box	<p>Adds a basic search box (and associated image) to the page in which users can enter search criteria. The contributor can specify whether users of the search box can search all page groups or only a specific page group.</p>
List of Objects	<p>Adds a list of objects (pages, categories, and perspectives) that the contributor specifies to the page. The contributor can choose to display this list as a drop down list or as links (with or without associated images).</p>
Portal Smart Text	<p>Adds smart text, such as the current date, current users, or current page to the page.</p>
Object Map Link	<p>Adds a map of objects available in the portal.</p>
Page Path	<p>Adds the page path to the page. The contributor can choose the number of levels for the path, and the character that separates the path levels.</p>
Page Function	<p>Adds a page function to the page. If there are no page functions associated with the current page, this item type is not available to the content contributor.</p>

Table B–7 Built-in Custom Item Types

Item Type	Description
Simple File	<p>Based on the Base File item type, this item type contains very few attributes.</p>
Simple Image Map	<p>Based on the Base Image Map item type, this item type contains very few attributes.</p>

Table B-7 Built-in Custom Item Types

Item Type	Description
Simple Image	Based on the Base Image item type, this item type contains very few attributes.
Simple PL/SQL	Based on the Base PL/SQL item type, this item type contains very few attributes.
Simple Page Link	Based on the Base Page Link item type, this item type contains very few attributes.
Simple Text	Based on the Base Text item type, this item type contains very few attributes.
Simple URL	Based on the Base URL item type, this item type contains very few attributes.
File	Similar to the Simple File item type, except with more attributes. This item type is included by default in newly created page groups.
Image	Similar to the Simple Image Map item type, except with more attributes. This item type is included by default in newly created page groups.
PL/SQL	Similar to the Simple PL/SQL item type, except with more attributes.
Page Link	Similar to the Simple Page Link item type, except with more attributes. This item type is included by default in newly created page groups.
Text	Similar to the Simple Text item type, except with more attributes. This item type is included by default in newly created page groups.
URL	Similar to the Simple URL item type, except with more attributes. This item type is included by default in newly created page groups.

Table B-7 Built-in Custom Item Types

Item Type	Description
Zip File	Uploads a zip file, which users can then unzip within the page group as a method of uploading many files in a single operation. This item type is included by default in newly created page groups.

B.5 Built-in Portlets

OracleAS Portal provides many portlets to get you started with building your portal. The following table lists the portlets that OracleAS Portal provides by default and where they can be found in the Portlet Repository.

Note: If the portal administrator has reorganized the Portlet Repository, these built-in portlets may be in different locations within the Portlet Repository.

You can find many more portlets in the OracleAS Portal Portal Catalog. The Catalog includes portlets and services offered by our OracleAS Portal Partners, and you can see the full list of partners and get a brief description of their offerings at <http://portalcatalog.oracle.com>.

Portlet Builders

Table B-8 Built-in Portlets in the Portlet Builders Page of the Portlet Repository

Portlet	Description
OmniPortlet	Display spreadsheet, XML, and Web Service data as tabular, chart, news, bullet, and form layouts. Interact with page parameters and events.
Web Clipping Portlet	Generic portlet for re-purposing existing dynamic Web content, by clipping parts from them as portlet content in the building of dynamic pages aggregating various sources of information from the Web.
Simple Parameter Form	Enable users to submit parameter values that are passed to a page.
HTML Portlet	Create or edit HTML content.

Table B-8 Built-in Portlets in the Portlet Builders Page of the Portlet Repository

Portlet	Description
Report Portlet	Add a report directly to the page.
XML Portlet	Display XML data directly on the page.
URL Portlet	Display another Web page.
Form Portlet	Add a form directly to the page.

Table B-9 Built-in Portlets in the Survey Builder Page of the Portlet Repository

Portlet	Description
Survey Builder	Create, edit, or copy questions, score text (essay) responses, purge responses, or delete a survey, test, or poll. See Section B.5.7, "Working with the Survey Portlets"
Survey Form	Display a survey, test, or poll. See Section B.5.7, "Working with the Survey Portlets"
Survey Chart	Display the cumulative results of a survey, test, or poll in a bar chart format. Drill down for individual participant results. See Section B.5.7, "Working with the Survey Portlets"
Survey Report	Display the cumulative results of a survey, test, or poll in a report format. Drill down for individual participant results. See Section B.5.7, "Working with the Survey Portlets"

Table B-10 Built-in Portlets in the Additional Portlet Builders Page of the Portlet Repository

Portlet	Description
Calendar Portlet	Add a calendar directly to the page.
Chart Portlet	Add a chart directly to the page.
Data Component Portlet	Add a data component directly to the page.
Dynamic Page Portlet	Add a dynamic page directly to the page.
Hierarchy Portlet	Add a hierarchy directly to the page.
Menu Portlet	Add a menu directly to the page.
MobileXML Portlet	Create or edit Oracle Application Server Wireless XML content.

Portal Content Tools

Table B–11 *Built-in Portlets in the Portal Content Tools Page of the Portlet Repository*

Portlet	Description
Favorites	List links to your favorite Web pages. See Section B.5.1, "Working with the Favorites Portlet" .
Advanced Search	Perform an advanced search within page groups.
Basic Search	Perform a basic search within page groups.
Custom Search	Create a custom search that exposes attributes, search criteria and parameters, and so on.
My Approval Status	List the status of items awaiting approval.
My Notifications	List notifications about approvals, expirations, and subscriptions.
My Page	Display your personal page Note: This portlet is available only if you have a personal page, or you are the portal administrator or the Shared Objects page group administrator.
Pending Approvals Monitor	List items awaiting approval.
Saved Searches	List your saved searches.
User Managed Pages	List the pages on which you have the Manage privilege.
Set Language	Set the language for the portal. See Section B.5.5, "Working with the Set Language Portlet" .

Published Portal Content

The Published Portal Content page of the Portlet Repository contains portlets published from the default page groups.

Shared Portlets

The Shared Instances page of the Portlet Repository is where a portlet appears if it has been shared.

Portal Community News

Table B–12 *Built-in Portlets in the Portal Community News Page of the Portlet Repository*

Portlet	Description
Product News	Display news about OracleAS Portal. See Section B.5.6, "Working with the OracleAS Portal Community Portlets" .
Developer News	Display technical news about OracleAS Portal. See Section B.5.6, "Working with the OracleAS Portal Community Portlets" .
OracleAS Portal Community	List links to the OracleAS Portal community. See Section B.5.6, "Working with the OracleAS Portal Community Portlets" .
Documentation News	Display news about OracleAS Portal documentation. See Section B.5.6, "Working with the OracleAS Portal Community Portlets" .

Administration Portlets

Table B–13 *Built-in Portlets in the SSO/OID Page of the Portlet Repository*

Portlet	Description
External Applications	List links to your external applications. See Section B.5.3, "Working with the External Applications Portlet" .
Login	Log on directly from a page. See Section B.5.4, "Working with the Login Portlet" .
SSO Server Administration	Administer users, configure partner and external applications for authentication through the Oracle Application Server Single Sign-On Server, and edit the Oracle Application Server Single Sign-On Server configuration.
User	Create or edit users.
Group	Create or edit groups of users.
People Search	Search for a user.
Portal Group Profile	Edit a group's portal preferences and global privileges.
Portal User Profile	Edit a user's portal preferences and global privileges.

Table B–14 Built-in Portlets in the Database Page of the Portlet Repository

Portlet	Description
Database Navigator	Navigate database objects. Note: The Navigator portlets are specifically designed for use on the Navigator pages. If you add them to pages outside of the Navigator, you may get unexpected behavior. Therefore, we recommend that you avoid placing the Navigator portlets on pages outside of the Navigator.
Schemas	Create, edit, or navigate to a database schema.
Roles	Create or edit a database role.
Database Information	List statistics about database settings and parameters.
Database Memory Consumption, Transactions and Locks	List statistics about database memory consumption, transactions, and locks.
Database Storage	List statistics about database storage.
Batch Results	List status and results for background applications.

Table B–15 Built-in Portlets in the Portal Page of the Portlet Repository

Portlet	Description
Services	Edit portal settings
Export/Import Transport Set	Edit transport sets for exporting, import transport sets, and view information about existing transport sets.
Clear Cache	Clear the cache.
Database Providers	Create, edit, or navigate to a Portal database provider.
Error Message Portlet	List diagnostic information for error messages.
Find	Search page groups, Portal database providers, and database objects.
Mobile log by portlet	List the headers and content of the mobile-enabled portlets, and the results of an Oracle Application Server Wireless XML syntax check on the content of those portlets. Note: This portlet is intended for use by mobile portlet developers to test their portlets.

Table B–15 Built-in Portlets in the Portal Page of the Portlet Repository

Portlet	Description
Most recent mobile log entry	List the headers and content of the most recently accessed mobile-enabled portlet, and the results of an Oracle Application Server Wireless XML syntax check on the content of that portlet. Note: This portlet is intended for use by mobile portlet developers to test their portlets.
Page Group Navigator	Navigate page groups. Note: The Navigator portlets are specifically designed for use on the Navigator pages. If you add them to pages outside of the Navigator, you may get unexpected behavior. Therefore, we recommend that you avoid placing the Navigator portlets on pages outside of the Navigator.
Page Groups	Create, edit, or navigate to a page group; create or edit a page; create a style or page template.
Portlet Repository	Display the Portlet Repository, refresh all the portlets in the Portlet Repository, or view the refresh log.
Providers Navigator	Navigate providers, including Portal database providers and their portlets. Note: The Navigator portlets are specifically designed for use on the Navigator pages. If you add them to pages outside of the Navigator, you may get unexpected behavior. Therefore, we recommend that you avoid placing the Navigator portlets on pages outside of the Navigator.
Recent Objects	List the objects recently modified by you. See Section B.5.2, "Working with the Recent Objects Portlet" .
Remote Provider Group	Create, edit, or refresh provider groups.
Remote Providers	Create, edit, or refresh provider information.

Table B–16 Built-in Portlets in the Oracle Reports Security Page of the Portlet Repository

Portlet	Description
Oracle Reports Security	Access Reports Security portlets.
Reports Server Access	Create or edit access to Oracle Reports servers.
Reports Definition File Access	Create or edit access to Oracle Reports definition files.

Table B–16 Built-in Portlets in the Oracle Reports Security Page of the Portlet Repository

Portlet	Description
Reports Printer Access	Create or edit access to Oracle Reports printers.
Reports Calendar Access	Create or edit availability calendars for Reports servers, printers, and report definition files.

Samples

The Samples page of the Portlet Repository does not contain any default portlets.

Portlet Staging Area

The Portlet Staging Area page of the Portlet Repository is where the portlets appear when a provider is first registered with the portal. The portal administrator can edit the Portlet Repository to move these portlets to a more suitable location.

B.5.1 Working with the Favorites Portlet

The Favorites portlet allows users to quickly access their most often used and favorite Web pages.

You can add, edit, delete, and move favorites in the Favorites portlet. You can also create default favorites for all users of the portlet. Additionally, you can customize the portlet to control how the favorites and favorite groups are displayed.

A favorites group is a collection of favorites and groups that are usually logically related. For example, you might create a favorites group called Newspapers that contains links to The New York Times, The Washington Post, and so on. The favorite group might also contain other favorite groups called Michigan Publications and Libertarian Press, which contain favorites to URLs related to those themes.

Favorite groups are displayed in the Favorites portlet only if you select the Hierarchical display method on the Edit Favorites Portlet Settings page. Favorite groups are designated by the **Favorite Group** icon:

Figure B–1 The Favorites Portlet in Hierarchy Display Mode



If you select the Flat List display method, favorites are shown without the group to which they belong:

Figure B–2 The Favorites Portlet in Flat List Display Mode



B.5.1.1 Customizing the Favorites Portlet

To add links to your favorite Web pages, you customize the Favorites portlet. You can also customize the Favorites portlet to:

- Change the name of the portlet (for example, from Favorites to Sarah's Sites).
- Choose to display the favorites by group or as a flat list.

- Choose to display the default favorites as well as your own favorites.
- Choose to display the favorites in a new browser window.
- Control how many favorites are displayed in the portlet.

Note: When you customize the Favorites portlet, the changes that you make are visible only to yourself.

Customize the Favorites Portlet Settings

To customize the Favorites portlet settings:

1. In the Favorites portlet header, click the **Customize** link.
2. In the **Display Name** field, enter a descriptive display name for the Favorites portlet. The display name is displayed in the Favorites portlet header.
3. In the **Structure** list, choose **Hierarchy** to display your favorite groups, as well as the favorites within them. You can nest your groups to two levels within the portlet, not including the root level. Choose **Flat** to remove group names from the portlet and display all the favorites in a list.
4. Select the **Display Default Favorites** check box to include the default favorites in the portlet, as well as your own favorites.
5. Select the **Open Favorites In New Browser Window** check box to open the favorites in a new browser window.
6. In the **Display** radio group, select **Show All** to show all your favorites in the portlet, or select **Limit List To** and enter a number from 0 to 99 to control how many favorites are displayed.
7. Click **OK**.

Click **Reset to Defaults** to restore the Favorites portlet settings to the default settings. This does not delete your favorites from the Favorites portlet, it simply resets the portlet settings, such as the Display Name and Structure.

Adding a favorite

To add a favorite:

1. In the Favorites portlet header, click the **Customize** link.
2. Click the **Add Or Edit Favorites** link.

3. To add a favorite at the top level, click the **Create Favorite** link next to Actions. To add a favorite to a group, click the **Create Favorite** link next to the group.
4. In the **Display Name** field, enter a descriptive display name for the favorite. The display name is displayed as a link in the Favorites portlet.
5. In the **URL** field, enter the URL of the Web page that you are adding as a favorite.
6. In the **Description** field, enter a description for the favorite. The description is visible only when you are editing the favorite.
7. Click **Create**.

Creating a Favorite Group

To create a favorite group:

1. In the Favorites portlet header, click the **Customize** link.
2. Click the **Add Or Edit Favorites** link.
3. To create a favorite group at the top level, click the **Create Group** link next to Actions. To create a favorite group under another group, click the **Create Group** link next to the group.
4. In the **Display Name** field, enter a descriptive display name for the favorite group. The display name is displayed in the Favorites portlet.
5. In the **Description** field, enter a description for the favorite group. The description is visible only when you are editing the favorite group.
6. Click **Create**.

Editing a Favorite or Favorite Group

To edit a favorite or favorite group:

1. In the Favorites portlet header, click the **Customize** link.
2. Click the **Add Or Edit Favorites** link.
3. Click the **Edit** link next to the favorite or favorite group that you want to edit.
4. Edit the favorite or favorite group settings as required.
5. Click **OK**.

Moving a Favorite or Favorite Group

To move a favorite or favorite group:

1. In the Favorites portlet header, click the **Customize** link.
2. Click the **Add Or Edit Favorites** link.
3. Click the **Move** link next to the favorite or favorite group that you want to move.
4. Click the **Move To** link next to the group under which you want to move the favorite or favorite group.

Deleting a Favorite or Favorite Group

To delete a favorite or favorite group:

1. In the Favorites portlet header, click the **Customize** link.
2. Click the **Add Or Edit Favorites** link.
3. Click the **Delete** link next to the favorite or favorite group that you want to delete.
4. If you are deleting a favorite group, click **Yes** in the confirmation page. If you are deleting a favorite, the favorite is deleted immediately. You are not prompted for confirmation.

Note: When you delete a favorite group, all the favorites and favorite groups belonging to the deleted favorite group are also deleted.

B.5.1.2 Adding Default Favorites and Favorite Groups to the Favorites Portlet

In addition to the favorites that users create themselves, page designer can create default favorites that display to all users of the Favorites portlet. Both the user added favorites and the default favorites display in the Favorites portlet.

Adding a Default Favorite

To add a default favorite:

1. Edit the page that contains the Favorites portlet.
2. Click the **Edit Defaults** icon next to the Favorites portlet.
3. Click the **Add Or Edit Default Favorites** link.

4. To add a default favorite at the top level, click the **Create Favorite** link next to Actions. To add a default favorite to a group, click the **Create Favorite** link next to the group.
5. In the **Display Name** field, enter a descriptive display name for the default favorite. The display name is displayed as a link in the Favorites portlet.
6. In the **URL** field, enter the URL of the Web page that you are adding as the default favorite.
7. In the **Description** field, enter a description for the default favorite. The description is visible only when you are editing the default favorite.
8. Click **Create**.

Creating a Default Favorite Group

To create a default favorite group:

1. Edit the page that contains the Favorites portlet.
2. Click the **Edit Defaults** icon next to the Favorites portlet.
3. Click the **Add Or Edit Default Favorites** link.
4. To create a default favorite group at the top level, click the **Create Group** link next to Actions. To create a default favorite group under another group, click the **Create Group** link next to the group.
5. In the **Display Name** field, enter a descriptive display name for the default favorite group. The display name is displayed in the Favorites portlet.
6. In the **Description** field, enter a description for the default favorite group. The description is visible only when you are editing the default favorite group.
7. Click **Create**.

B.5.2 Working with the Recent Objects Portlet

The Recent Objects portlet allows users to quickly access the objects they most recently created or edited within OracleAS Portal.

B.5.2.1 Customizing the Recent Objects Portlet

You can customize the Recent Objects portlet to complete one or more of the following tasks:

- Change the name of the portlet (for example, from Recent Objects to Most Used).
- Control how many objects are displayed in the portlet.
- Choose which object attributes to display.

To customize the Recent Objects portlet:

1. In the Recent Objects portlet header, click the **Customize** link.
2. In the **Banner** field, enter a descriptive display name for the Recent Objects portlet. The display name is displayed in the Recent Objects portlet header.
3. In the **Display** radio group, select **Show All** to show up to 50 objects in the portlet, or select **Limit List To** and enter a number from 0 to 50 to explicitly control how many objects are displayed.
4. Select to appropriate **Display** check boxes to control what appears next to the objects in the portlet. Select:
 - **Object Type** to display the type of object, such as Page or Master-Detail Form.
 - **Object Image** to display a visual representation of the object.
 - **Numbered List** to place a number in sequential order to the left of each object.
5. Click **OK**.

Click **Reset to Defaults** to restore the Recent Objects portlet settings to the default settings.

B.5.3 Working with the External Applications Portlet

The External Applications portlet allows users to access applications outside of OracleAS Portal that require an HTML form-based login. For links and applications that do not require a login, a Favorites link is a better choice.

B.5.3.1 Customizing the External Applications Portlet

You can customize the External Applications portlet to complete one or more of the following tasks:

- Change the name of the portlet.
- Choose to display or hide certain applications.

- Supply your user name and password for applications so that OracleAS Portal can automatically log you in.
- Change the name of the application as it appears in the portlet.

To customize the External Applications portlet:

1. In the External Applications portlet header, click the **Customize** link.
2. In the **Banner** field, enter a descriptive display name for the External Applications portlet. The display name is displayed in the External Applications portlet header.
3. Select the appropriate **Display** check boxes to control which applications display in the portlet. If a check box is not selected, the associated application does not appear in the portlet.

The portal administrator determines which applications are included in this list.

4. If you want OracleAS Portal to automatically log you into the application whenever you launch it from the External Applications portlet, click the **Edit** icon to enter your user name and password for the application.
 - a. In the **User Name/ID** field, enter your user name for this application.
 - b. In the **Password** field, enter your password for this application.

If you ever change your password for this application, be sure to update your password on this page as well.
 - c. Select the **Remember My Login Information For This Application** check box.
 - d. Click **OK**.
5. To launch the application itself, click the link in the **Application Name** column. If necessary, fill in your user name and password, then click Login.
6. To change the name of the application as it appears in the portlet, enter the new name in the **Preferred Name** field.
7. Click **OK**.

Click **Reset to Defaults** to restore the External Applications portlet settings to the default settings. Clicking **Reset to Defaults** returns you to your page.

B.5.4 Working with the Login Portlet

The Login portlet allows users to log in to a portal directly from a page. If the self-registration feature is enabled, the Login portlet can also include a link to allow users to register with the portal and create their own user accounts.

B.5.4.1 Setting Up the Login Portlet

You can control the following aspects of the Login portlet:

- The name of the portlet.
- The pages to display on successful login or logout.
- Whether to display the Login portlet when users are logged on.
- Whether users can register themselves with the portal.

To set up the Login portlet:

1. Edit the page that contains the Login portlet.
2. Click the **Edit Defaults** icon next to the Login portlet.
3. In the **Banner** field, enter a descriptive display name for the Login portlet. The display name is displayed in the Login portlet header.
4. In the **On Success URL** field, enter the URL of the page to display when users successfully log on.

Leave this field blank if you want to display the same page that contains the Login portlet.

5. In the **On Cancel URL** field, enter the URL of the page to display when users log out.

Leave this field blank if you want to display the same page that contains the Login portlet.

6. Select the **Hide Portlet** check box if you do not want to display the Login portlet when users are logged on.

If you do not select this check box, the Login portlet is displayed containing a Logout link.

7. Select the **Enable Self-Registration** check box if you want to allow users to register with the portal and create their own user accounts.
 - a. In the **Self-Registration Link Text** field, enter the text for the self-registration link. This is the link that users click to register with the

portal and create their own user accounts. The default is Create New Account.

- b. In the **Self-Registration URL** field, enter the URL of the page to display when users click the self-registration link.

If you do not have your own custom self-registration page, leave this field blank to use the default self-registration page provided by OracleAS Portal.

8. Click **OK**.

B.5.5 Working with the Set Language Portlet

The Set Language portlet allows users to set the language to use for their portal sessions. If the territory feature is enabled, users can also set their geographical location (territory) so that localization settings such as date, currency, and decimal formats are displayed correctly. If the territory feature is not enabled, the territory is defaulted to the most common for the selected language. Users in different territories may notice some of the localization settings are different from what they might expect.

B.5.5.1 Setting Up the Set Language Portlet

You can control the following aspects of the Set Language portlet:

- The name of the portlet.
- How the languages are displayed in the portlet.
- Whether users can also set their territory.

To set up the Set Language portlet:

1. Edit the page that contains the Set Language portlet.
2. Click the **Edit Defaults** icon next to the Set Language portlet.
3. In the **Banner** field, enter a descriptive display name for the Set Language portlet. The display name is displayed in the Set Language portlet header.
4. Select the **Display Languages Vertically** check box if you want the list of languages to display in a single vertical list. If you do not select this check box, the list of languages displays horizontally in several rows.
5. Select the **Enable Territory Selection** check box if you want to enable users to specify their geographical location (territory) for the portal session.
6. Click **OK**.

B.5.6 Working with the OracleAS Portal Community Portlets

The OracleAS Portal Community portlets enable you to plug into the ever growing OracleAS Portal Community. Through the OracleAS Portal Community portlets, you can access useful resources on the Portal Center, such as the Developer Services with the latest Portal Developer Kit, Portal Studio, and Knowledge Exchange. You can also access resources for training, support, upgrade, discussion, and the Partner Initiative, including the Portal Catalog.

The OracleAS Portal Community portlets can also render dynamic content. To display this dynamic content, you must perform the steps below.

Displaying Dynamic Content in the OracleAS Portal Community Portlets

To display dynamic content in the OracleAS Portal Community portlets:

1. In the Services portlet, click the **Proxy Settings** link.
By default, the Services portlet is located on the Administer tab of the Builder page.
2. In the **HTTP Proxy Host** and **Port** fields, enter your site's proxy server settings.
3. Click **Add**.
4. In the Select Proxy section, select the proxy server you just added.
5. Click **OK**.

Some of the OracleAS Portal Community portlets cache their content for a day, which means that they will not immediately change. The Developer News portlet on the Builder page is such a portlet. To immediately refresh these portlets, follow the steps below.

Refreshing the OracleAS Portal Community Portlets

To refresh the OracleAS Portal Community portlets:

1. Edit the page that contains the portlet that you want to refresh.
2. Click the **Edit Defaults** icon next to the portlet.
3. In the **Network Access** list, make sure that **on** is chosen.
4. Click **OK**.
5. In the banner click the **Refresh** link.

B.5.7 Working with the Survey Portlets

The Survey Builder distinguishes between surveys, polls, and tests through different options available to each type. For example, when you create a test, you're given the options of specifying the correct answer for each question and assigning a value to each correct answer. Neither polls or surveys come with these options, but they do allow you to specify that participants can select multiple answers for a given question. For tests, you can choose only one answer per question. Hand scoring is also available for essay questions on a test. Non-essay questions are scored automatically. Scoring is not used with surveys or polls.

Surveys and polls are similar, though surveys are more complex. When you create a survey (or a test), you can set up sections of questions, and, depending on a participant's answer to a particular question, automatically redirect the survey to a different section. This option isn't available with polls.

For example, imagine a survey that seeks to understand how employees feel about a relaxed dress code. The survey is divided into three sections: main, relaxed, and formal. The main section has only one question: What type of dress code would you prefer? This question has two answers: relaxed or formal. Everyone answers this question. If participants answer relaxed, they're automatically sent to the relaxed section, which seeks to clarify what they mean by relaxed. These participants end up answering the questions in the main and relaxed sections. If participants answer formal, they are automatically sent to the formal section, which seeks to clarify what they mean by formal. These participants end up answering the questions in the main and formal sections.

Additionally, with surveys you have the option of gathering identity information about participants. Polls don't offer this option.

For all types of surveys (including surveys, polls, and tests), you can choose the answer format for each question. Answers may be selected via radio buttons, pull-down lists, and check boxes, as well as text boxes for essay-type responses.

B.5.7.1 Creating a Survey

Planning out your survey in advance will allow you, for example, to pre-build all your sections before you populate them with questions. This way, sections will be available for setting up triggered redirections as you build your survey. It isn't required that you do this, however. If you wish, you can edit your survey after all sections and all questions are in place, adding redirections to different sections at this time.

To create a survey:

1. In the Survey Builder portlet, click the **Create Survey** link.
2. In the **Name** field, enter a name for your survey. This name will display in your survey's portlet header.
3. In the **Page Group** list, choose the page group to use to store text responses.
4. In the **Type** radio group, make sure that **Survey** is selected.
5. In the Participant Identity section, select the check boxes next to the information you will use to identify survey participants.

When users take this survey, whatever information is already available in their Portal User Profile will populate automatically. Otherwise, users will be prompted to supply this information. Any information they supply may also be written to their Portal User Profile if the user requests it. The default value is Anonymous (no check boxes are selected).

6. Select the **Multiple Replies** check box if you plan to allow participants to take the survey more than once.

Selecting this option means that every time users log in, their view of the survey refreshes and their original answers do not appear. If you do not allow multiple replies, until users click the Finish button to complete the survey, every time they log in their view of the survey retains all of their answers. This option allows users to go back and modify their answers as well as to leave the survey—even to log off—and continue taking it later.

7. Select the **Place Survey** check box if you want to automatically place the survey on a specific page.
 - a. From the **Page Group** list, choose the page group that owns the page on which you want to place the survey.
 - b. In the popup window, click **Return Object** next to the page on which you want to place the survey.

You can leave the **Place Survey** check box cleared and the page unspecified until you are completely satisfied with the survey. You can also add the survey to any page later by adding and editing the Survey Form portlet.

8. In the End of Survey Options section, choose what will happen once the user completes the survey and clicks Finish. Choose:
 - **Show Chart of Responses** to display a bar chart of participant responses.
 - **Show Report of Responses** to display a report of participant responses.

- **Allow Editing of Responses** to return to the first survey question, with the user's answers intact, allowing the user to revise any original responses.
 - **Show Nothing** to close the Survey Form portlet (that is, the portlet containing the survey will no longer display on the user's page).
9. In the **Welcome message** field, enter a message that will precede the first question in the survey.
 10. Select the **First page shows only welcome message** to include the welcome message on its own page. The first question in the survey will be displayed on the next page.
 11. In the **Closing comments** field, enter a message that will follow the last question in the survey.
 12. Click **Next**.
 13. From the **Section** list, choose the section in which to include the question. To create a new section, choose **-- new --**. If you are creating a new section:
 - a. In the **Section** field, enter a name for the section.
 - b. In the **Message** field, enter a message to display at the beginning of the section, before any questions.
 - c. From the **Copy from** list, choose a section from which to copy questions.
 - d. Click **Finish**.
 14. In the **Question** field, enter a question. Each question can contain up to 500 characters.
 15. From the **Display Style** list, choose the format for the response to the question. Choose from **Check Box**, **Radio Buttons**, **Pull Down List**, and **Text**. Check boxes and radio buttons will display to the left of each response. Users will click one or more of these to respond. Pull down lists will populate with whatever answers you enter in the Answer Choices field. Users will choose one or more items from this list. Text boxes are suitable for essay questions. Users will enter their answers in the text field to respond to this question.

Text responses are stored on a page with the same name as the survey in the page group specified in the step 3 of this task.
 16. Select the **Allow Multiple Responses** check box if you want users to be able to select more than one check box or item from the pull down list in response to this question.

17. Select the **Include "Other" choice and "Please Explain" field** check box if you want users to be able to respond with an answer other than those provided for this question.

Responses entered in the Please Explain field are stored on a page with the same name as the survey in the page group specified in step 3 of this task.

18. Select the **Response is optional** check box if you want to allow users to finish the survey without providing an answer to the question.
19. In the **Image** field, enter the path and file name of an image to associate with the question.
20. In the **Answer choices** field, enter the allowable responses for the question. Press Enter after each choice. This field can contain up to 32,000 characters. Do not enter any values in this field if you chose Text as the Display Style for the question.
21. If you want some responses to lead the user to another section of the survey, in the Trigger section:
 - a. From the **This answer** list, select the response that will trigger the redirection.
 - b. From the **Triggers section** list, select the section to go to when the user provides the chosen response.

22. Click **Add another question**.

When you add a question, it is listed on the left hand side of the page. You can click the **Edit** icon next to the question to edit the question later.

23. If you want to add another question, repeat steps 13 through 22. If you have finished entering your questions, click **Next**.
24. If you are happy with your survey, click **Finish**. If you are not, click **Back** to edit your questions.

B.5.7.2 Creating a Poll

Polls are straightforward lists of questions and potential responses, either multiple choice, or text. Compared with surveys, polls are much simpler. Polls are useful when your information gathering requirements are simple and do not require the identification of your respondents.

To create a poll:

1. In the Survey Builder portlet, click the **Create Poll** link.

2. In the **Name** field, enter a name for your poll. This name will display in your poll's portlet header.
3. In the **Page Group** list, choose the page group to use to store text responses.
4. In the **Type** radio group, make sure that **Poll** is selected.
5. Select the **Multiple Replies** check box if you plan to allow participants to take the poll more than once.

Selecting this option means that every time users log in, their view of the poll refreshes and their original answers do not appear. If you do not allow multiple replies, until users click the Finish button to complete the poll, every time they log in their view of the poll retains all of their answers. This option allows users to go back and modify their answers as well as to leave the poll—even to log off—and continue taking it later.

6. Select the **Place Poll** check box if you want to automatically place the poll on a specific page.
 - a. From the **Page Group** list, choose the page group that owns the page on which you want to place the poll.
 - b. In the popup window, click **Return Object** next to the page on which you want to place the poll.

You can leave the **Place Poll** check box cleared and the page unspecified until you are completely satisfied with the poll. You can also add the poll to any page later by adding and editing the Survey Form portlet.

7. In the Finish Button Text field, enter the text that you want to appear on the poll's Finish button.
8. In the End of Poll Options section, choose what will happen once the user completes the poll and clicks Finish. Choose:
 - **Show Chart of Responses** to display a bar chart of participant responses.
 - **Show Report of Responses** to display a report of participant responses.
 - **Allow Editing of Responses** to return to the first poll question, with the user's answers intact, allowing the user to revise any original responses.
 - **Show Nothing** to close the Survey Form portlet (that is, the portlet containing the poll will no longer display on the user's page).
9. In the **Welcome message** field, enter a message that will precede the first question in the poll.

10. Click **Next**.
11. In the **Question** field, enter a question. Each question can contain up to 500 characters.
12. From the **Display Style** list, choose the format for the response to the question. Choose from **Check Box**, **Radio Buttons**, **Pull Down List**, and **Text**. Check boxes and radio buttons will display to the left of each response. Users will click one or more of these to respond. Pull down lists will populate with whatever answers you enter in the Answer Choices field. Users will choose one or more items from this list. Text boxes are suitable for essay questions. Users will enter their answers in the text field to respond to this question.

Text responses are stored on a page with the same name as the poll in the page group specified in the step 3 of this task.

13. Select the **Allow Multiple Responses** check box if you want users to be able to select more than one check box or item from the pull down list in response to this question.
14. Select the **Include "Other" choice and "Please Explain" field** check box if you want users to be able to respond with an answer other than those provided for this question.

Responses entered in the Please Explain field are stored on a page with the same name as the poll in the page group specified in step 3 of this task.

15. Select the **Response is optional** check box if you want to allow users to finish the poll without providing an answer to the question.
16. In the **Image** field, enter the path and file name of an image to associate with the question.
17. In the **Answer choices** field, enter the allowable responses for the question. Press Enter after each choice. This field can contain up to 32,000 characters. Do not enter any values in this field if you chose Text as the Display Style for the question.

18. Click **Add another question**.

When you add a question, it is listed on the left hand side of the page. You can click the **Edit** icon next to the question to edit the question later.

19. If you want to add another question, repeat steps 11 through 18. If you have finished entering your questions, click **Next**.
20. If you are happy with your poll, click **Finish**. If you are not, click **Back** to edit your questions.

B.5.7.3 Creating a Test

Use tests to evaluate your participants' level of understanding of a particular subject area, and to assign scoring values to your participants' correct responses. With the Survey Builder, you can create complex tests with multiple sections and automatic redirection based on participant responses, or simple tests comprised of lists of questions and potential answers.

Planning your test in advance will allow you, for example, to prebuild all your sections before you populate them with questions. This way, sections will be available for setting up triggered redirections as you build your test. It isn't required that you do this, however. If you wish, you can edit your test after all sections and all questions are in place, adding redirections to different sections at this time.

To create a test:

1. In the Survey Builder portlet, click the **Create Test** link.
2. In the **Name** field, enter a name for your test. This name will display in your test's portlet header.
3. In the **Page Group** list, choose the page group to use to store text responses.
4. In the **Type** radio group, make sure that **Test** is selected.
5. In the Participant Identity section, select the check boxes next to the information you will use to identify test participants.

When users take this test, whatever information is already available in their Portal User Profile will populate automatically. Otherwise, users will be prompted to supply this information. Any information they supply may also be written to their Portal User Profile if the user requests it. The default value is Anonymous (no check boxes are selected).

6. Select the **Multiple Replies** check box if you plan to allow participants to take the test more than once.

Selecting this option means that every time users log in, their view of the test refreshes and their original answers do not appear. If you do not allow multiple replies, until users click the Finish button to complete the test, every time they log in their view of the test retains all of their answers. This option allows users to go back and modify their answers as well as to leave the test—even to log off—and continue taking it later.

7. Select the **Place Test** check box if you want to automatically place the survey on a specific page.

- a. From the **Page Group** list, choose the page group that owns the page on which you want to place the test.
- b. In the popup window, click **Return Object** next to the page on which you want to place the test.

You can leave the **Place Test** check box cleared and the page unspecified until you are completely satisfied with the test. You can also add the test to any page later by adding and editing the Survey Form portlet.

8. In the **End of Test Options** section, choose what will happen once the user completes the test and clicks **Finish**. Choose:
 - **Show Chart of Responses** to display a bar chart of participant responses.
 - **Show Report of Responses** to display a report of participant responses.
 - **Allow Editing of Responses** to return to the first test question, with the user's answers intact, allowing the user to revise any original responses.
 - **Show Nothing** to close the Survey Form portlet (that is, the portlet containing the test will no longer display on the user's page).
9. In the **Welcome message** field, enter a message that will precede the first question in the test.
10. Select the **First page shows only welcome message** to include the welcome message on its own page. The first question in the test will be displayed on the next page.
11. In the **Closing comments** field, enter a message that will follow the last question in the test.
12. Click **Next**.
13. From the **Section** list, choose the section in which to include the question. To create a new section:
 - a. From the **Section** list, choose **-- new --**.
 - b. In the **Section** field, enter a name for the section.
 - c. In the **Message** field, enter a message to display at the beginning of the section, before any questions.
 - d. From the **Copy from** list, choose a section from which to copy questions.
 - e. Click **Finish**.

14. In the **Question** field, enter a question. Each question can contain up to 500 characters.
15. From the **Display Style** list, choose the format for the response to the question. Choose from **Check Box**, **Radio Buttons**, **Pull Down List**, and **Text**. Check boxes and radio buttons will display to the left of each response. Users will click one or more of these to respond. Pull down lists will populate with whatever answers you enter in the Answer Choices field. Users will choose one or more items from this list. Text boxes are suitable for essay questions. Users will enter their answers in the text field to respond to this question.

Text responses are stored on a page with the same name as the test in the page group specified in the step 3 of this task.
16. Select the **Response is optional** check box if you want to allow users to finish the test without providing an answer to the question.
17. In the **Image** field, enter the path and file name of an image to associate with the question.
18. In the **Answer choices** field, enter the allowable responses for the question. Press Enter after each choice. This field can contain up to 32,000 characters. Do not enter any values in this field if you chose Text as the Display Style for the question.
19. If you want some responses to lead the user to another section of the test, in the Trigger section:
 - a. From the **This answer** list, select the response that will trigger the redirection.
 - b. From the **Triggers section** list, select the section to go to when the user provides the chosen response.
20. From the **Correct Answer** list, choose the correct answer to the question.
21. In the **Scoring Weight** field, assign a score for the correct value. You can enter a score for text answers too. This value will be used as the default score for a correct response when hand scoring is run.
22. Click **Add another question**.

When you add a question, it is listed on the left hand side of the page. You can click the **Edit** icon next to the question to edit the question later.
23. If you want to add another question, repeat steps 13 through 22. If you have finished entering your questions, click **Next**.

24. If you are happy with your survey, click **Finish**. If you are not, click **Back** to edit your questions.

B.5.7.4 Adding a Survey, Poll, or Test to a Page

When you create or edit a survey, poll, or test, you can choose to automatically place it on a particular page. Alternatively, you can add the survey, poll, or test to any page yourself.

To add a survey, poll, or test to a page:

1. Edit the page to which you want to add the survey, poll, or text.
2. In the region where you want to add the survey, poll, or test, click the **Add Portlets** icon.

If you do not see the **Add Portlets** icon, the region may be an item region, in which case, you cannot add portlets to this region.

3. Click the link for the **Survey Form** portlet.

By default, the Survey Form portlet is located under the Survey Builder page of the Portlet Repository (which in turn is under the Portal Tools page). If you cannot find the My Notifications portlet under this page, use the Search field.

4. Click **OK**.
5. Next to the portlet, click the **Edit Defaults** icon.
6. In the **Name** field, enter the name of the survey, poll, or test.
7. In the **Start Date** field, enter the date on which to make the survey, poll, or test available to participants.
8. In the **End Date** field, enter the date on which the survey, poll, or test ends.
9. In the **Questions per page** field, enter the number of questions to appear on each page of the survey, poll, or test. Enter All to display all the questions on a single page.
10. Use the **Font Face**, **Color**, **Size**, **A** (bold), *A* (italic), and A (underscored) settings to determine the appearance of the different types of text in the survey. You can set different font settings for questions, instructions, answers, and identification information. You can also set the background color of the survey, poll, or test itself.
11. Click **OK**.

Glossary

About mode

An optional **portlet show mode** that displays information about the portlet's copyright, version, and author.

access control list

See **ACL**.

ACL

Access Control List. A list of groups and users authorized for specific access to an object.

advanced search

A search engine that enables users to:

- Find content that contains any or all terms in the search string.
- Search selected **page groups**, or search across all page groups.
- Restrict the search to a particular **page**, **category**, **perspective**, **item type**, or **attribute**.

If **Oracle Text** is installed and enabled, advanced search can also be used to perform near, soundex, and fuzzy searches.

See also **search portlet**. Contrast with **basic search** and **custom search**.

AJP

Apache JServ Protocol. Open standard protocol for communication between Apache-based HTTP servers, such as the **Oracle HTTP Server** and J2EE servers, such as JServ, Tomcat, or **OC4J**.

API

Application Programming Interface. A set of exposed data structures and functions that an application can use to invoke services on a **portlet**, **page**, or **page group**. Note that OracleAS Portal APIs are exposed through the **PDK** available on **Portal Center** (<http://portalcenter.oracle.com/>).

Apache JServ Protocol

See **AJP**.

application

Obsolete terminology. See **database provider**.

Application Programming Interface

See **API**.

Application Service Provider

See **ASP**.

approval notification

A message in the Notification portlet indicating that the creation or update of an **item** requires an approval. Approval notifications are sent to the list of approvers identified in an **approval process**. An approver may respond to the notification by approving or rejecting the item in question.

approval process

A series of one or more steps in which a newly created or updated **item** must be approved before it can be published. Each step in an approval process must have one or more approvers, where each approver is either a user or a **group**. Routing to the approvers can be in serial (one at a time) or in parallel (all at once), and each step can be defined to require a response (either an approval or a rejection) by any one member or by all members. Once the required number of responses is received during a step, the process continues to the next step. The process ends when the item is rejected, or the final step is reached and the document is approved.

ASP

Application Service Provider. Provides remote hosting of applications, maintaining and operating the hardware, software, and other resources required to run the applications. A good example is Oracle Portal Online (<http://portal.oracle.com>), a hosted subscription service that provides the

features of OracleAS Portal to smaller businesses and organizations who want to build [portals](#) but do not have the resources in-house to build and manage them.

attribute

Stores information (or metadata) about an [item](#) or [page](#): for example, Create Date, Expire Date, or Author. [page group administrators](#) can create custom attributes to extend the functionality of [item types](#) and [page types](#). For example, a base attribute on a file is Display Name; a custom attribute might be a check box to indicate whether the file is confidential. Custom attributes are useful for assigning unique, searchable identifiers to items.

authenticated user

User who is logged on to OracleAS Portal. By default, authenticated users can access and, based on privileges granted to the user, act on certain OracleAS Portal objects, such as [pages](#).

Contrast with [public users](#), who can access only public content.

authorization

The evaluation of security constraints to send a message or make a request. Authorization uses specific criteria—authentication and restriction—to determine whether the request should be permitted.

authorized user

See [authenticated user](#).

banner

See [region banner](#). See also [navigation page](#).

base attribute

See [attribute](#).

base item type

See [item type](#).

base page type

See [page type](#).

basic search

Enables users to find content that contains a specific search string.

See also [search portlet](#). Contrast with [advanced search](#) and [custom search](#).

basic search box item type

A [navigation item type](#) that a user can add to a [page](#) to allow other users to search. You can specify whether users of the search box can search all [page groups](#) or only in selected page groups.

batch job

Running an OracleAS Portal [portlet](#) in the background using the OracleAS Portal batch job facility. An end user can run a portlet in batch mode by selecting options on the portlet's [customization form](#). Batch processing is useful if the portlet is based on a large amount of data, if the portlet displays many rows of data, or if the job may take a long time to run.

bind variable

Variable in a SQL statement that must be replaced with a valid value or address of a value in order for the statement to execute successfully. Portlet developers typically use bind variables (for example :dept) to display a [parameter entry field](#) in an OracleAS Portal [portlet's customization form](#). The entry field allows end users to choose the data that the portlet will display.

bookmark

See [favorite](#).

breadcrumbs

See [page path item type](#).

Builder page

See [Portal Builder page](#).

bulk load

See [zip file item type](#).

caching

The act of storing frequently accessed information, typically Web pages or [portlets](#) in OracleAS Portal, in a location where it can be accessed quickly, to avoid frequent content generation. For example, [Oracle Application Server Web Cache](#) stores dynamically-generated portlets in its memory, then serves them to the [PPE](#) when there is a request for the specified portlet. This storage reduces the total time spent

handling the request by avoiding connections to the back-end database and other Web sites.

See also [expiry-based caching](#), [invalidation-based caching](#), [system level caching](#), and [validation-based caching](#).

calendar

An OracleAS Portal [portlet](#) that displays the results of a SQL [query](#) in calendar format.

call interface

Displays the arguments that were selected when an OracleAS Portal [portlet](#) was originally created or last edited.

category

A predefined [attribute](#) used to group or classify [pages](#), [items](#), and [portlets](#) in a [page group](#). A category helps users answer the question "What is this item or page?" For example, in a travel page group, you might have categories for maps, snapshots, and hotel reviews. Only one category can be assigned to a particular item or page.

Contrast with [perspective](#).

chart

An OracleAS Portal [portlet](#) that displays the results of a SQL [query](#) as a chart, such as a bar chart, pie chart, or line chart. Charts are based on at least two table or view columns: one that identifies the bars on the chart and another that calculates the size of the bars on the chart.

check-out/check-in

See [document control](#).

child object

An object which is part of a hierarchy. For example, sub-pages, sub-categories, and sub-perspectives are child objects of a [page](#), [category](#), and [perspective](#) respectively.

See also [manifest](#).

CHTML

Compact HTML. A subset of [HTML](#) recommendations, designed for small devices.

classification

Categories and perspectives are used to classify the content of a [page](#) so that it is easy for users to locate that content during a search.

See also [category](#) and [perspective](#).

cluster

A database [object](#) used to store tables that are related to one another and that are often joined together in the same area on a disk.

community

See [Portal Community](#).

compact HTML

See [CHTML](#).

component

Obsolete terminology. See [portlet](#).

content area

Obsolete terminology. See [page group](#).

content contributor

User who has the appropriate privileges to add [items](#) to a [page](#). Appropriate page privileges include Manage Content and Manage Items With Approval. Appropriate item privileges include Manage, Edit, and View.

content item type

A means of identifying the actual content of an [item](#) that is being uploaded to a [page](#), such as a document, text, or an image.

Built-in content item types are:

- [file item type](#) and [simple file item type](#)
- [text item type](#) and [simple text item type](#)
- [URL item type](#) and [simple URL item type](#)
- [image item type](#) and [simple image item type](#)
- [image map item type](#)
- [PL/SQL item type](#) and [simple PL/SQL item type](#)

- [page link item type](#) and [simple page link item type](#)
- [zip file item type](#)

See also [item type](#). Contrast with [navigation item type](#).

CSS

Cascading Style Sheet.

current version

The version of an [item](#) that is displayed on the [page](#). The current version is not necessarily the most recent version of the item.

See also [versioning](#).

custom attribute

See [attribute](#).

custom item type

See [item type](#).

customization form

Page that prompts end users for values to pass to an OracleAS Portal [portlet](#). End users can view the customization form for a portlet, if one has been created, by clicking the portlet's **Customize** link.

custom page type

See [page type](#).

custom provider

A type of [provider](#) that enables you to create and maintain [portlets](#) that access customer-specific content or applications. You can build custom portlets in OracleAS Portal either declaratively or programmatically.

custom search

Enables users to define a variety of searches against information stored in the OracleAS Portal schema of the [Oracle Application Server Metadata Repository](#). By editing the default customizations of the Custom Search portlet, you can define unique search submission forms and results pages that meet the specific search requirements, or configure portlets that execute and return results based on predefined search criteria.

See also [search portlet](#). Contrast with [advanced search](#) and [basic search](#).

DAD

Database Access Descriptor. A set of values that specify how an application connects to an Oracle database to fulfill an HTTP request. The information in the DAD includes the user name (which also specifies the schema and the privileges), password, connect-string, error log file, standard error message, and NLS parameters such as NLS language, NLS date format, NLS date language, and NLS currency.

Database Access Descriptor

See [DAD](#).

database administrator

See [DBA](#).

database object

See [object](#).

database provider

A type of [provider](#) that is written as a PL/SQL [stored procedure](#) and is used to create [portletlets](#) that reside in the database. One example of a database provider is a provider built using the wizards in OracleAS Portal to provide form, report, and chart portlets.

Contrast with [Web provider](#).

data-driven portlet

You can use data-driven [portletlets](#) to display, create, or update data stored in the objects of an Oracle database. OracleAS Portal provides build wizards for creating data-driven portlets. The build wizards produce PL/SQL procedures that are stored in the database.

data portlet

An OracleAS Portal [portlet](#) that displays data in a spreadsheet format.

DAV

See [WebDAV](#).

DBA

Database Administrator. User belonging to the DBA [group](#). By default, members in the DBA group have access to all OracleAS Portal product pages, and have the Manage privilege for all [pages](#), [page groups](#), [database providers](#), and administration.

default subscriber

The base [subscriber](#) that is installed along with the install of OracleAS Portal.

de-militarized zone

See [DMZ](#).

developer

Builds portlets for others to include on their pages. Relies heavily on the APIs to extend the capabilities of OracleAS Portal; may frequently consult the [Portal Knowledge Exchange](#) or the forums for advice or inspiration.

Developer Services

See [Portal Developer Services](#).

DIP

Directory Integration Platform. The provisioning platform provided by [OID](#) to synchronize different directories and directory enabled applications.

direct access URL

A feature that allows a user to directly access or bookmark an OracleAS Portal [object](#) (e.g., a [page](#), [category](#), [perspective](#), or document) using a [URL](#) that contains the object type and name. Direct access URLs are typically shorter and more traditional in appearance since the URL does not contain parameters, for example:

```
http://mymachine.mycompany.com:5000/pls/portal/url/page/toplevelsite
```

Contrast with [dynamic URL](#). See also [durable link](#).

Directory Information Tree

See [DIT](#).

Directory Integration Platform

See [DIP](#).

display name

An **object**'s external name used throughout OracleAS Portal, for example, in the **Navigator**, on **pages**, and in the page editor. When the object is published as a **portlet**, the display name is used as the title of the portlet in the **Portlet Repository**.

Distinguished Name

See **DN**.

DIT

Directory Information Tree. A hierarchical tree-like structure in Oracle Internet Directory (**OID**) consisting of the **DNs** of the entries.

DN

Distinguished Name. The unique name of a directory entry in Oracle Internet Directory (**OID**). It includes all the individual names of the parent entries back to the root. The Distinguished Name tells you exactly where the entry resides in the directory's hierarchy. This hierarchy is represented by a directory information tree (**DIT**).

DMZ

De-militarized Zone. Computer host or small network inserted as a "neutral zone" between a company's private network and the outside public network. It prevents outside users from getting direct access to a server that has company data. A DMZ is an optional and more secure approach to a **firewall** and effectively acts as a **proxy server** as well. (The term comes from the geographic buffer zone that was set up between North Korea and South Korea following the UN police action in the early 1950s.)

document control

Allows users to check-out an item so that other users cannot edit that item, thus preventing users from overwriting each others changes. When the user has finished editing the item, he or she checks the item back in, making it available again for other users to edit.

DR

Disaster Recovery.

durable link

A link to an item that uses the item's GUID (globally unique ID) to uniquely identify it. An item's GUID does not change so its durable link will not break when the item is edited, renamed, moved, or imported to a different portal instance.

Contrast with [direct access URL](#).

dynamic page

An OracleAS Portal [portlet](#) that displays dynamic content on a page. The dynamic page build wizard enables you to specify one or many PL/SQL blocks within HTML code to create a page. This code executes every time an end user requests the page.

dynamic URL

A URL that contains a query string (one or more parameters and the characters ? and &).

Contrast with [direct access URL](#).

edge side includes

See [ESI](#).

Edit mode

Page editing: Edit mode enables an authenticated user with appropriate privileges to set [page](#) properties and to add, modify, or delete [portlets](#) and [items](#) on the page. To switch to Edit mode, the user clicks an **Edit** link on the page. There are three Edit mode views: [graphical view](#), [layout view](#), and [list view](#).

See also [Mobile Preview mode](#) and [Pending Items Preview mode](#).

Portlets: An optional portlet [show mode](#) that enables personalization of the portlet on a per user, per instance basis.

Contrast with [Edit Defaults mode](#).

Edit Defaults mode

An optional [portlet show mode](#) that enables administrators to set the defaults of a portlet for all users.

Contrast with [Edit mode](#).

EM

Oracle Enterprise Manager. A component of the **Oracle Application Server** that enables administrators to manage Oracle Application Server services through a single environment. For example, an administrator can use EM to monitor the services that make up an OracleAS Portal instance, including **HTTP** services, **mod_plsql** services, the **Oracle Application Server Single Sign-On Server**, the **PPE**, the Oracle database, and **providers**.

enterprise portal

Enterprise **portals** are common, integrated starting points that provide personalized access to relevant enterprise information sources. Enterprise portals enable site visitors to customize their view of the resources available on the public Internet.

ESI

Edge Side Includes. A markup language to enable partial page caching (**PPC**) of HTML fragments.

event

See **page event**.

Event servlet

The Event servlet implements the functionality of OracleAS Portal to allow for dynamic page navigation when accessing an event enabled **portlet**. The Event servlet runs in the same container as the **PPE**.

expiration period

Number of days after which, or an exact date on which, an **item** expires. After an item expires, it is viewable only by the item's or **page**'s owner and the **page group administrator** in **Edit mode**. Expired items are removed from the database during a **system purge** of all expired items.

expiry-based caching

A **caching** method that uses a retention period to specify how long the item is valid in the cache, before a refresh is required. Pages that use expiry-based caching may also be cached in the user's browser.

See also **invalidation-based caching** and **validation-based caching**.

expiry notification

A message automatically sent to a user or **group** indicating that an **item** on the **page** is about to expire. The notification is set up by the **page group administrator**.

explicit object

Export object category. An object which is explicitly selected, from the Navigator or Bulk Actions for export.

See also **manifest** and **referenced object**.

export

A method of creating a set of files (**transport set**) that contains **page groups**, **pages**, **portlets**, and other content from a single OracleAS Portal instance. You can then **import** this set of files into another Oracle Application Server instance.

eXtensible Markup Language

See **XML**.

external application

Application external to OracleAS Portal that is typically launched from the External Applications **portlet**. As each external application is configured by a **portal administrator**, users simply supply their user name and password information. The **Oracle Application Server Single Sign-On Server** will present these credentials for future authentication challenges.

external object

Export object category. An object which is an external dependency of an **explicit object**. External objects ensure that the explicit objects perform on the target portal.

See also **manifest**.

favorite

A hyperlink in the Favorites **portlet** that provides quick access to a frequently visited **URL**, either inside or outside your company firewall. An **authenticated user** can customize the Favorites portlet with his or her own preferred set of frequently accessed URLs.

favorite group

A collection of **favorites** (and favorite groups) that are usually logically related.

Federated Portal Adapter

See [FPA](#).

file item type

One of the default [item types](#) that a [content contributor](#) can add to a [page](#). When a user adds a file item to a page, the file is uploaded into the OracleAS Portal schema of the [Oracle Application Server Metadata Repository](#) and displayed as a hyperlink on the page. When a user clicks the [display name](#) link, the files may be downloaded to the user's computer or displayed in the user's Web browser, depending on the file type and the configuration of the browser.

firewall

A machine that acts as an intermediary to protect a set of computers or networks from outside attack. It regulates access to computers on a local area network from outside, and regulates access to outside computers from within the local area network. A firewall can work either by acting as a [proxy server](#) that forwards requests so that the requests behave as though they were issued by the firewall machine, or by examining requests and attempting to eliminate suspect calls.

folder

Obsolete terminology. See [page](#).

form

An OracleAS Portal [portlet](#) that provides a transactional interface to one or more database tables, views, or procedures. For example, you can use tools in OracleAS Portal to build a form for entering new employee information into your Human Resources database.

See also [master-detail form](#).

FPA

Federated Portal Adapter. The Federated Portal Adapter is a module in the portal instance (written in both Java and PL/SQL) that receives [SOAP](#) messages for a [Web provider](#), parses the SOAP, and then dispatches the messages to a [database provider](#) as PL/SQL procedure calls. In effect, the Federated Portal Adapter makes a database provider behave exactly the same way as a Web provider, allowing users to distribute their database providers across database servers. All remote providers can be treated as Web providers, hiding their implementation (database or Web) from the user. The most common use is to share database providers (including page groups) owned by one portal instance among other portal instances.

frame driver

An OracleAS Portal **portlet** consisting of a Web page divided into two frames. A driving frame contains a SQL **query** that drives the contents of the second (target) frame.

Full Screen mode

An optional **portlet show mode** that provides more content than can be shown in the portlet when it is sharing a page with other portlets.

function

PL/SQL subprogram that performs a specified sequence of actions and then returns a value. Functions are usually small, very specific blocks of code written to perform a specific task within the scope of a larger application.

In a **page**, end users execute functions by clicking the title of a PL/SQL or custom item.

gist

An **Oracle Text** summary consisting of the document paragraphs which best represent the overall subject matter. You can use such summaries to skim the main content of the text or assess your interest in the text's subject matter.

global privilege

A **privilege** that grants a certain level of access to a user or **group** on all **objects** of a particular type. For example, you could grant a Web Designer group Manage privileges on all **styles**.

grantee

User who is given privileges on an **object** by another user.

graphical view

Page editing view that renders **page** content in-place on the page. Graphical view enables you to view pages and **items** as they appear on the finished page as you edit.

Contrast with **layout view** and **list view**.

group

Collection of OracleAS Portal users who typically share a common need or interest; for example, Human Resources, Accounting, and so on. Groups make it easy to grant access to an **object** (such as a **page** or **portlet**) to several users at once. You can

also use groups to implement user roles by assigning role-related privileges to a group, then adding users in that role. **OID** tracks the membership of OracleAS Portal groups.

group owner

User who has the privilege to add or delete members from a **group**, or to delete the group itself. Groups can have more than one owner.

HA

High Availability.

Handheld Device Markup Language

See **HDML**.

HDML

Handheld Device Markup Language. A simple language to define hypertext-like markup content and applications for handheld devices with small display.

Help mode

An optional **portlet show mode** that displays usage information about the functionality of the portlet.

hierarchy

An OracleAS Portal **portlet** that displays data from a self-referencing table or view. At least two columns in the table must share a recursive relationship. A hierarchy can contain up to three levels and display data such as employees in an organization chart or the hierarchical relationship between menus in a Web site.

home page

The **page**, defined within OracleAS Portal, that typically displays when logging on or when a user selects the Home **smart link item type**. The **portal administrator** chooses this page for **public users**; **authenticated users** may choose their own. If the portal administrator enables **mobile page** design, he or she can specify a separate mobile home page to display when the portal is accessed from a mobile device.

hosted site

See **stripe**.

HTML

Hyper Text Markup Language. A format for encoding hypertext documents that may contain text, graphics, and references to programs and other hypertext documents.

HTTP

Hyper Text Transfer Protocol. The underlying format, or protocol, used across the Web to format and transmit messages and determine what actions **Web servers** and browsers should take in response to various commands. HTTP is the protocol typically used between **Oracle Application Server** and its clients.

Hyper Text Markup Language

See [HTML](#).

Hyper Text Transfer Protocol

See [HTTP](#).

IDE

Integrated Development Environment. A visual tool containing editors, debuggers, screen painters, object browsers, and the like.

ILS

Item Level Security. Mechanism that controls granular access to **items** on a given **page**. ILS authorizes item managers to grant explicit item access to users and **groups** that take precedence over page-level privileges.

image item type

One of the default **item types** that a **content contributor** can add to a **page**. You can add images in JPEG, GIF, or PNG formats.

image map item type

One of the default **item types** that a **content contributor** can add to a **page**. An image map is a single image with hotspots that, when clicked, link to other **URLs**. For example, you can create an image map of the world each continent is hyperlinked to more information about the continent.

import

A method of transporting content and **objects** (e.g., **page groups**, **pages**, and **portlets**) into an OracleAS Portal instance. For example, you can import a page, its associated **style**, and its contents from one instance of OracleAS Portal to another.

index

Optional structure associated with a table used to locate rows of the table quickly, and (optionally) to guarantee that every row is unique.

Integrated Development Environment

See [IDE](#).

internal image name

The name used to identify an image that has been uploaded to the portal. Uploaded images can be reused within the portal by referencing their internal names.

internal provider

A type of [provider](#) that makes [page group objects](#) ([pages](#), [navigation pages](#), etc.) available to instances of OracleAS Portal.

invalidation-based caching

A [caching](#) method used by [Oracle Application Server Web Cache](#), where an item remains in the cache until some event occurs that requires it to be refreshed. For example, a user may update an item, requiring the cache to be updated. In response to the event, the portal or a [provider](#) sends an invalidation message to Oracle Application Server Web Cache. The next time there is a request for the invalidated item, it is refreshed in the cache.

Any data saved in Oracle Application Server Web Cache is considered valid until it is invalidated or it expires. When the information cached in Oracle Application Server Web Cache becomes inaccurate, it must be invalidated. The [page metadata](#) saved in Oracle Application Server Web Cache is invalidated, for example, if the page designer changes the page structure or when the user's privileges change. A [portlet](#) may become invalidated when the end user customizes it.

See also [expiry-based caching](#) and [validation-based caching](#).

item

An individual piece of content (text, hyperlink, image, etc.) that resides on a [page](#) in an item [region](#). Users with an appropriate privilege level can add items to a page. Item content and metadata are stored in the OracleAS Portal schema of the [Oracle Application Server Metadata Repository](#). Items are rendered on the page according to the layout, [style](#), and [attribute](#) display defined for the item region.

See also [item type](#).

item ID

Local database reference to the content of an **item**. An item ID value is used in custom **item types** to pass items to PL/SQL procedures. The function uses the item ID to access the content of the item.

item level security

See [ILS](#).

item type

Defines the contents of an **item** and the **attributes** that are stored (metadata) about an item. Item types are categorized as **content item types** and **navigation item types**.

Custom item types can be created by **page group administrators** to extend the functionality provided by item types and store additional attribute information about items.

item versioning

See [versioning](#).

J2EE

Java 2 Platform, Enterprise Edition. This platform enables application developers to develop, deploy, and manage multi-tier, server-centric, enterprise level applications. The J2EE platform offers a multi-tiered distributed application model, integrated XML-based data interchange, a unified security model, and flexible transaction control. You can build your own J2EE **portlets** and expose them through **Web providers**.

See also [OC4J](#).

J2SE

Java 2 Platform, Standard Edition. This platform enables application developers to develop, deploy, and manage Java applets and applications on a desktop client platform such as a personal computer or workstation. J2SE not only defines **API** standards, but also specifies the deployment of enterprise applications, thus enabling application server administrators to perform the deployment regardless of the vendor of the J2SE server.

See also [OC4J](#).

Java 2 Platform, Enterprise Edition

See [J2EE](#).

Java 2 Platform, Standard Edition

See [J2SE](#).

JavaScript

Scripting language developed by Netscape that allows generation of [portlet](#)s that introduce dynamic behavior in otherwise static [HTML](#). OracleAS Portal allows you to use JavaScript to create routines that validate entry fields in [forms](#) and [customization forms](#). You can also create JavaScript event handlers for entry fields and buttons on forms.

JavaServer Page

See [JSP](#).

JSP

JavaServer Page. An extension to [servlet](#) functionality that provides a simple programmatic interface to Web pages. JSPs are [HTML](#) pages with special tags and embedded Java code that is executed on the Web or application server. JSPs provide dynamic functionality to HTML pages. They are actually compiled into servlets when first requested and run in the servlet container.

See also [JSP tags](#).

JSP tags

Tags that can be embedded in [JSP](#)s to enclose Java code. These tags use the `<jsp:` syntax and enclose action elements in the JSP with `begin` and `end` tags similar to [XML](#) elements.

keyword

An [attribute](#) used to provide additional information about a [page](#) or [item](#) so that users can easily locate the page or item during a search.

layout view

Page editing view that enables you to add, arrange, and remove [regions](#) on the [page](#). You can also hide, show, delete, or move content in this view.

Contrast with [graphical view](#) and [list view](#).

LBR

Load-balancing router. A very fast network device that distributes Web requests to a large number of servers. It provides portal users with a single published address, without them having to send each request to a specific **middle tier** server.

LDAP

Lightweight Directory Access Protocol. A standard for representing and accessing user and group profile information.

level

Used to provide structure to **mobile pages** and as a way to limit the amount of content displayed on the smaller screens of mobile devices. Users drill down into the levels on a mobile page to view more content.

library

Collection of one or more PL/SQL or Java program units. Libraries can be referenced by several applications simultaneously.

Lightweight Directory Access Protocol

See **LDAP**.

Link mode

An optional **portlet show mode** that enables portlets to render themselves on mobile devices, such as cellular telephones.

list view

Page editing view that displays a listing of all **page** content and provides options that enable you to perform actions (delete, move, copy, etc.) on multiple **objects**.

Contrast with **graphical view** and **layout view**.

list of objects item type

A **navigation item type** that a user can add to a **page**. This item type is a list of objects (e.g., pages and **perspectives**) that users can choose to display as a drop-down list or as links (with or without associated images).

list of values

See **LOV**.

load-balancing router

See [LBR](#).

local provider group

The collection of [providers](#) that are defined within an instance of OracleAS Portal. Provider groups make it easier to share providers defined or registered within one instance of OracleAS Portal with other OracleAS Portal instances.

See also [provider group](#). Contrast with [remote provider group](#).

lock

Setting automatically applied to an OracleAS Portal [portlet](#) when it is being edited. The setting prevents other users from editing the portlet.

In [WebDAV](#) the action of preventing other users from editing a file. Locking a file in a WebDAV client checks out the corresponding [item](#) in the portal itself.

login/logout link item type

A [navigation item type](#) that a user can place on a [page](#) to enable other users to log in or log out of the portal.

LOV

List of values. An OracleAS Portal [portlet](#) that allows developers to add selectable values to entry fields in [forms](#). A single list of values can be displayed in different formats, such as combo boxes, radio buttons, or check boxes.

manifest

The list of objects in a [transport set](#) and their dependents, also provides a granular level of control over the import mode.

master-detail form

An OracleAS Portal [portlet](#) that displays a master table row and multiple detail rows within a single HTML page. Values in the master row determine which detail rows are displayed for querying, updating, inserting, and deleting.

See also [form](#).

menu

An OracleAS Portal [portlet](#) that displays a Web page containing options that end users can click to navigate to other menus, other OracleAS Portal portlets, or [URLs](#).

middle tier

Part of the OracleAS Portal architecture that handles **HTTP** user requests by forwarding them to the appropriate Portal database or **provider**, assembles Portal **pages**, and manages **caching** of Portal content.

mobile page

A **page type** that enables page creators to produce **pages** specifically for mobile devices, e.g., cellular phones.

Mobile Preview mode

A preview mode that allows you to preview how your page will look on a mobile device.

mobile XML

See **Oracle Application Server Wireless XML**.

mod_oc4j

The **Oracle HTTP Server** module that manages the communication between the Oracle HTTP Server and **OC4J**.

mod_plsql

The **Oracle HTTP Server** module that handles the database connections made from the Oracle HTTP Server. It enables PL/SQL database procedures to generate **HTTP** responses containing formatted data and **HTML** code that can display in a Web browser.

navigation item type

Used to provide navigation and to access or execute portal-specific functions.

Built-in navigation item types include:

- **smart link item type**
- **smart text item type**
- **login/logout link item type**
- **basic search box item type**
- **list of objects item type**
- **object map link item type**
- **page path item type**

- **page function item type**

See also **item type**. Contrast with **content item type**.

navigation page

A special purpose **page** within a **page group** that is typically embedded on other pages or **page templates** to implement standard user interface effects such as navigation bars and banners. Often contains **navigation item types** for navigation within the portal.

Navigator

A feature for locating **objects** and interacting with OracleAS Portal. Provides access to **objects** to which the user has privileges, such as **page groups**, **providers**, and database objects.

non-default subscriber

A **subscriber** that has a **stripe** on a hosted OracleAS Portal provided by an **ASP**.

object

1. OracleAS Portal object: A structure such as a **page group**, **portlet**, **page**, or **style**.
2. Database object: An Oracle database structure such as a table, procedure, or trigger. These objects can be created using OracleAS Portal wizards or Oracle database commands.

object map link item type

A **navigation item type** that a user can add to a page to display a map of **objects** that are available in the portal.

OC4J

Oracle Application Server Containers for J2EE. The **J2EE** server component of **Oracle Application Server** written entirely in Java that executes on the standard Java Development Kit (JDK) Virtual machine (Java VM). It includes a **JSP** Translator, a Java **servlet** container, and an Enterprise JavaBeans (JB) container.

OID

Oracle Internet Directory. The repository for storing OracleAS Portal user credentials and **group** memberships. By default, the **Oracle Application Server Single Sign-On Server** authenticates user credentials against OID information about dispersed users and network resources. OID combines LDAP version 3 with

the high performance, scalability, robustness, and availability of the Oracle database.

OmniPortlet

A Web provider that provides portlets that can display spreadsheet, XML, and Web Service data as tabular, chart, news, bullet, and form layouts.

OPCA

OracleAS Portal Configuration Assistant. A Java-based configuration tool for installing and configuring OracleAS Portal. In a typical **Oracle Application Server** installation, the OPCA is executed by the Oracle Universal Installer (OUI) in the post-installation phase. The OPCA can also be invoked in the standalone mode.

OPPI

OracleAS Portal Partner Initiative. This initiative is dedicated to fostering a community of leading system integrators, content providers, and software vendors, who build, deliver, and support solutions built around OracleAS Portal. The Initiative is open to third parties who share Oracle's enterprise portal vision and who want to develop solutions using Oracle's open framework for building and managing enterprise portals. Membership in the OracleAS Portal Partner Initiative broadens the reach and enlarges the market available to the member. Members are able to enter information about their company and their products and services in the **Portal Catalog** (<http://portalcatalog.oracle.com/>). By collaborating with Oracle, members add valuable content and applications to the OracleAS Portal framework. At the same time, partners are able to offer their own customers more value by leveraging the content and services provided by Oracle and by other members of the Initiative. See the OPPI page on **Portal Center** (<http://portalcenter.oracle.com/>) for more information.

Oracle Application Server

Oracle's integrated application server:

- Standards compliant (**J2EE**, Web Services, and **XML**)
- Delivers a comprehensive set of capabilities, including portal, **caching**, wireless, integration, and personalization
- Provides a single, unified platform for Java and J2EE, Web Services, XML, SQL, and PL/SQL

Oracle Application Server Containers for J2EE

See **OC4J**.

Oracle Application Server Metadata Repository

An Oracle database that contains schemas and business logic used by application server components (including OracleAS Portal) and other pieces of the infrastructure.

OracleAS Portal uses a schema within the Oracle Application Server Metadata Repository to store and manage the content and metadata associated with the portal instance.

Oracle Application Server Portal

A component of [Oracle Application Server](#) used for the development, deployment, administration, and configuration of enterprise class [portals](#). OracleAS Portal incorporates a portal building framework with self-service publishing features to enable you to create and manage information accessed within your portal.

Oracle Application Server Portal Developer Kit

See [PDK](#).

Oracle Application Server Single Sign-On Server

A component of [Oracle Application Server](#) that enables users to log in to all features of the Oracle Application Server product suite, as well as to other Web applications, using a single user name and password. OracleAS Portal is integrated with Oracle Application Server Single Sign-On Server as a [partner application](#) and delegates authentication to it.

Oracle Application Server Web Cache

A component of [Oracle Application Server](#) that improves the performance, scalability, and availability of frequently used Web sites that run on the Oracle9i platform. By storing frequently accessed URLs in memory, Oracle Application Server Web Cache eliminates the need to repeatedly process requests for those URLs on the Web server. Oracle Application Server Web Cache uses [invalidation-based caching](#) and is integrated with OracleAS Portal for improved performance.

See also [portal cache](#).

Oracle Application Server Wireless

A component of [Oracle Application Server](#) used to deliver information and applications to mobile devices. Using Oracle Application Server Wireless, you can create custom portal sites that use different kinds of content, including Web pages, custom Java applications, and [XML](#)-based applications. Oracle Application Server

Wireless sites make this diverse information accessible to mobile devices without you having to rewrite the content for each target device platform.

Oracle Application Server Wireless XML

Device independent markup language used for communication between OracleAS Portal and [Oracle Application Server Wireless](#).

Oracle Application Server

See [Oracle Application Server](#).

OracleAS Portal

See [Oracle Application Server Portal](#).

OracleAS Portal Configuration Assistant

See [OPCA](#).

OracleAS Portal Partner Initiative

See [OPPI](#).

Oracle Enterprise Manager

See [EM](#).

Oracle HTTP Server

The [Web server](#) component of [Oracle Application Server](#), built on Apache Web server technology and used to service [HTTP](#) requests. It is the part of the [middle tier](#) that handles requests between the Web and OracleAS Portal. Extensions to the Oracle HTTP Server support Java [servlets](#), [JSPs](#), Perl, PL/SQL, and CGI applications.

Oracle Internet Directory

See [OID](#).

Oracle Technology Network

See [OTN](#).

Oracle Text

A feature of Oracle9i that provides advanced search and retrieval services on content stored in an Oracle repository. It is fully integrated into OracleAS Portal to provide users with the ability to perform a full text search and retrieval of content managed within the OracleAS Portal schema of the [Oracle Application Server](#)

Metadata Repository. It also provides automatic grouping and classification of results by **gist** and **theme**.

Oracle Ultra Search

An **Oracle Text**-based application that supports crawling, indexing, and federated searching of multiple, heterogeneous repositories including databases, file systems, **Web servers**, and e-mailing list archives.

Contrast with **search portlet**.

OTN

Oracle Technology Network. The online Oracle technical community that provides a variety of technical resources for building Oracle9i-based applications. You can access OTN at <http://otn.oracle.com/>.

Overwrite mode

See **Replace on Import mode**.

package

A database **object** consisting of a PL/SQL specification and a body. The specification includes the data types and subprograms that can be referenced by other program units. The body includes the actual implementation of the package.

page

An OracleAS Portal **object** that contains **portlet**s and **item**s. Each time you display a page, it is dynamically assembled and formatted according to the portlets and layout chosen for that page.

See also **page type**.

page designer

A page designer (also known as page manager) is a user with the Manage privilege on a page. A user with this privilege can perform any action on the page and can create sub-pages under the page. The page designer is often responsible for designing the layout (or region configuration) of the page and assigning privileges on the page to other users (for example, to determine who can add content to the page).

The scope of a page designer's control over a page may be limited if the page is based on a template.

page event

A user action defined by a portlet developer. User actions include clicking a link, button, or other control on a Web page. A page designer can specify that an event forces the reloading of the current [page](#) or the loading of another page, and passes [parameters](#) to the newly loaded page.

page function item type

A [navigation item type](#) that a user can add to a [page](#). A page function is a procedure call that a user can add to a custom [page type](#). If there are no page functions associated with the current page, this item type does not display.

page group

An OracleAS Portal [object](#) that groups and sets properties of related portal objects, such as [pages](#), [styles](#), [navigation pages](#), and [perspectives](#). Page groups typically contain a hierarchy of pages and sub-pages for organizing content.

page group administrator

User who has full privileges over an entire [page group](#). Page group administrators set up and maintain the page group; designate page owners; and create a taxonomy. Page group administrators can also view and manage all the [pages](#) in the page group.

page group map

Displays the hierarchical organization of all [page groups](#) in a portal and allows users to access individual [pages](#) within the page group. The page group map is tailored for each user; only the pages the user is authorized to view and/or edit are displayed.

page group quota

See [quota](#).

page link item type

One of the default [item types](#) that a [content contributor](#) can add to a [page](#). A page link provides a route via a hyperlink to another page within the [portal](#). When the user clicks the [display name](#) link, the page referenced by the item is displayed in the user's browser.

page manager

See [page designer](#).

page metadata

Stored information or attributes about a [page](#), which is used by OracleAS Portal to set its layout and cache.

page path item type

A [navigation item type](#) that a user can add to a [page](#). A page path is a chain of page reference names. Page paths, often called breadcrumbs, describe the complete directory path.

page template

An OracleAS Portal [object](#) that establishes a common look and feel and common content for every [page](#) that uses the template. Users creating the page may select a page template to define the layout of the page and add default content. A page template includes all the features of a page, therefore may contain [items](#), [navigation pages](#), and [portlets](#).

Contrast with [user interface \(UI\) template](#).

page toolbar

In page [Edit mode](#), the links at the top of the page that enable you to edit various aspects of the [page](#), switch editing views (e.g., from [graphical view](#) to [layout view](#)), edit [page group](#) properties, and so on.

page type

Defines the content of a [page](#) and the information that is stored about a page. Base page types included with OracleAS Portal are: [standard page](#), [mobile page](#), [PL/SQL page type](#), [JSP](#), and [URL page](#). Custom page types are page types created by [page group administrators](#) to extend the functionality provided by base page types and store additional information about pages.

Parallel Page Engine

See [PPE](#).

parameter

A value passed between [pages](#) and [portlets](#), or between portlets.

A page parameter is a page level parameter (created by a page designer) whose values can be mapped to portlet parameters.

A portlet parameter is declared by a provider. Page designers map page parameters to portlet parameters. When the [PPE](#) requests a portlet from a provider, only the

portlet parameters that the portlet declared and mapped to page parameters are sent.

parameter entry field

Field on a [customization form](#) that allows end users to enter values that will be passed to an OracleAS Portal [portlet](#).

partial page caching

See [PPC](#).

partner application

An application that has delegated its authentication to the [Oracle Application Server Single Sign-On Server](#). If registered with the SSO Server, users can log into multiple [partner applications](#) using a single log in page. In a given session, once users have been authenticated by the SSO Server, they won't need to log in again to access additional partner applications.

path aliasing

See [direct access URLs](#).

PDK

OracleAS Portal Developer Kit. The development framework used to build and integrate Web content and applications with OracleAS Portal. It includes toolkits, samples, and technical articles that help make portal development simple. You can take existing Java [servlets](#), [JSPs](#), [URL-accessible content](#) and Web Services and turn them into [portlets](#). It is typically used by external developers and vendors to create portlets and services. The PDK is regularly updated on [Portal Center](#) (<http://portalcenter.oracle.com/>) to provide developers with the latest tools and techniques.

See also [PDK-Java](#), [PDK-PL/SQL](#), and [PDK-URL Services](#).

PDK-Java

A toolkit for implementing [portlets](#) in Java and adding portal features. Used to declaratively turn your existing Java [servlets](#), [JSPs](#), and Web services into portlets.

See also [PDK](#). Contrast with [PDK-PL/SQL](#).

PDK-PL/SQL

A set of articles, samples, and services that enable PL/SQL programmers to easily create portlets and extend them by using PL/SQL [APIs](#).

See also [PDK](#). Contrast with [PDK-Java](#).

PDK-URL Services

A utility for declaratively turning secured and public Web content into [portlets](#). These services are capable of dynamically passing parameters to target [URLs](#), clipping and reformatting content, and providing SSO for applications requiring form-based or basic authentication. These services also allow developers to take any application written in any language and easily create integrated portlets. PDK-URL Services takes the URL of an application, parses the content, and uses the [PDK-Java](#) framework to create a portlet.

See also [PDK](#).

Pending Approvals Monitor

A portlet that allows you to list pending approvals in the page groups that you administer. You can list the pending approvals by approver, date, page group, or submitter.

Pending Items Preview mode

A preview mode that allows you to view items that are awaiting approval. This mode can be used by content contributors to preview items they have added before they are approved, and by approvers to preview items before they approve or reject them.

See also [Edit mode](#).

personal page

An area within OracleAS Portal where [authenticated users](#) can store personal content and share it with other users. The [portal administrator](#) can choose to create a personal page for a user when creating a user account.

perspective

A cross-category grouping of [items](#). Perspectives help users answer the question, "Who will be interested in this item?" For example, you can add links to diverse vacation spots around the world and assign perspectives like *Vacations for Nordic Enthusiasts*, *Archeology Expeditions*, and *Extreme Vacations for Adventurers* to items about vacation types. Users publishing content using an item type that includes a perspective attribute may specify none, one, or many values.

Contrast with [category](#).

PL/SQL item type

One of the default **item types** that a **content contributor** can add to a **page**. A PL/SQL item contains a block of PL/SQL code. When a user clicks the item, the block is executed. The result displays in the user's browser. PL/SQL items can also be displayed directly on the page.

PL/SQL function

See **function**.

PL/SQL page type

One of the **page types** supported by OracleAS Portal. PL/SQL pages contain PL/SQL code that generates **HTML** when the page is rendered.

poll

A set of questions used to find out information from users.

Contrast with **survey** and **test**.

portal

A common interface (i.e., a Web page) that provides a personalized, single point of interaction with Web-based applications and information relevant to individual users or class of users. Portals built using OracleAS Portal are made up of **pages** managed within **page groups**, containing **portlets** and **items**.

portal administrator

User with the highest level of privileges in OracleAS Portal. Portal administrators can view and modify anything in OracleAS Portal, even **pages** and **database providers** marked private. (The only exception is **groups**: although portal administrators can modify the POTAL_ADMINISTRATORS and POTAL_PUBLISHERS groups, they cannot modify any other group unless they have been named **group owner**.)

Portal Builder page

A predefined **page** that contains development and administrative **portlets** used to build and manage OracleAS Portal **objects** and services.

portal cache

The portal cache stores cache entries for objects that use **validation-based caching**. It also acts as a backup to the memory-based **Oracle Application Server Web Cache** when objects use both validation-based caching and **invalidation-based caching**.

Portal Catalog

The source for information on value-added products and services associated with OracleAS Portal. It contains information primarily on our OracleAS Portal Partners and the products and services these partners offer. The catalog is located on **Portal Center** (<http://portalcenter.oracle.com/>) or can be accessed directly at <http://portalcatalog.oracle.com/>. Users can search the catalog for **portlets** based on a variety of parameters—portlet category, provider type, or supported version of OracleAS Portal, company name, or location, company category, as well as keywords. Users can also browse the catalog through a tree control by expanding the categories that interest them to reveal participating partner companies, products, and services. The catalog is a self-service benefit for partners—partners can submit and manage their entries entirely online.

Portal Center

A Web site (<http://portalcenter.oracle.com/>) for you to find out everything you want to know about OracleAS Portal. Updated frequently, it always has the latest product information, and is home to the **Portal Developer Services** and **Portal Catalog**. This Web site contains all information about the product (including documentation, demonstrations, etc.), and provides access to OracleAS Portal expertise.

Portal Community

A network of people dedicated to creating and exchanging information about OracleAS Portal. This community includes anyone who uses OracleAS Portal; it can leverage the **Portal Knowledge Exchange** for sharing Portal-related information and take advantage of the **Portal Developer Services**.

Portal DB provider

See **database provider**.

Portal Developer Kit

See **PDK**.

Portal Developer Services

The network of people dedicated to creating and exchanging OracleAS Portal expertise. This program provides online testing tools through **Portal Center** (<http://portalcenter.oracle.com/>), as well as other venues, and interaction with the product team and other Portal developers, via newsletters, surveys, and the **Portal Knowledge Exchange**.

See also **Portal Community**.

Portal Knowledge Exchange

A self-service Web site where subscribers to the [Portal Developer Services](#) can share white papers, techniques, and portlets with others in the community.

portal page

See [page](#).

portal repository

See [Oracle Application Server Metadata Repository](#).

portal session

A period of interaction between a browser and OracleAS Portal, from the initial access to log off, closure of the browser window, or expiration of the session after a period of inactivity.

Portal smart link item type

A [navigation item type](#) that is self-configuring. For example, if you add a Home smart link to a [navigation page](#), when a user clicks the Home link, he or she is automatically taken to his or her [home page](#).

Portal smart text item type

A [navigation item type](#) that is self-configuring. For example, if you add a Current Date smart text item to a [navigation page](#), the current date is automatically pulled from the server and need not be specified (i.e., via complex coding) by you.

Portal Studio

A major component of [Portal Center](#) (<http://portalcenter.oracle.com/>) that is specifically tuned to the needs of the portal developer. Capabilities and services include a large technical library, sample code, a dedicated developer discussion forum, and multimedia training materials. Developers can also use the information and hosted resources here to register and test their [portlet](#)s without having to install their own copy of OracleAS Portal. You can access OracleAS Portal Studio directly at <http://portalstudio.oracle.com/>.

portlet

A reusable, pluggable Web component that typically displays portions of Web content. Portlets are the fundamental building blocks of an OracleAS Portal [page](#). Using the wizard-based portlet builder, you can easily create your own [data-driven portlets](#). OracleAS Portal also provides several ways to build portlets programmatically and to integrate any kind of Web content. Portlets may be

implemented using various technologies, such as Java, [JSPs](#), Java [servlets](#), PL/SQL, Perl, ASP, etc. The [PDK](#) covers the standard-based portlet development options that OracleAS Portal provides.

portlet provider

See [provider](#).

portlet publisher

User who can publish OracleAS Portal [objects](#) ([pages](#) or otherwise) as [portlet](#)s so that they can be included on pages.

portlet record

A programmatic structure that contains detailed information about a [portlet](#), such as its implementation style and [show mode](#) (PL/SQL).

Portlet Repository

A special [page group](#) that contains the [portlet](#)s available from the local [providers](#) and any registered remote providers. When you register a provider, the provider and its portlets are added to the Portlet Repository.

PPC

Partial Page Caching. A feature that enables [Oracle Application Server Web Cache](#) to independently cache and manage fragments of HTML documents. A template page is configured with Edge Side Includes ([ESI](#)) markup tags that tell Oracle Application Server Web Cache to fetch and include the HTML fragments. The fragments themselves are HTML files containing discrete text or other objects.

PPE

Parallel Page Engine. A multi-threaded [servlet](#) engine that runs in the [OC4J](#) container and services [page](#) requests. The PPE reads [page metadata](#), calls [providers](#) for [portlet](#) content, accepts provider responses, and assembles the requested page in the specified page layout. The Parallel Page Engine is part of the OracleAS Portal [middle tier](#).

pretty URL

See [direct access URL](#).

Preview mode

An optional [portlet show mode](#) that provides users with a preview of the portlet before they add it to a page.

primary key

Column in a database table consisting of unique values that can be used to identify rows in a table.

privilege

In OracleAS Portal, the right to perform an action. Privileges are either global (set through in the User or Group Profile) or specific to particular **objects** (usually set through the object's Access tab). When building applications, access can also be granted to database objects, shared portlets, portlets, and applications.

profile

Information about an OracleAS Portal user or group, such as password, user ID, and **privileges**.

property sheet

A built-in **attribute** that displays a summary of an **item**'s attributes or a **page**'s properties.

provider

The communication link between OracleAS Portal and a **portlet**. There are two types of providers: **Web providers** and **database providers**. Web providers may reside anywhere on the network and are addressed through **SOAP**. Web providers may be implemented using any Web technology. You can build your own Web providers by using the **PDK-Java** and the **PDK-URL Services**. Database providers reside within an Oracle database and manage portlets while performing data-intensive operations.

Providers act as containers for portlets; each portlet communicates with OracleAS Portal through its provider. Providers also manage the portlets they contain.

provider definition

A declarative, **XML**-based configuration file (`provider.xml`) that describes a **Web provider**, its **portlets**, and the location of the content to be displayed in the portlets. This configuration file also describes the behavior of the provider and its portlets.

provider group

A logical collection of **Web providers** defined by a provider group service. A **portal administrator** can register provider groups for use with their portal. Once registered, a provider group simplifies the process of registering individual **providers** in the group. This allows organizations that create Web providers to

publish registration details of their providers and facilitate automatic registration with any OracleAS Portal instance. The only information that must be given to the portal administrator is the name and location of the provider group.

See also [local provider group](#) and [remote provider group](#).

provider record

Record returned by a [database provider](#) containing specified information about a [portlet](#).

proxy server

A proxy server typically sits on a network [firewall](#) and allows clients behind the firewall to access Web resources. All requests from clients go to the proxy server rather than directly to the destination server. The proxy server forwards the request to the destination server and passes the received information back to the client. The proxy server channels all Web traffic at a site through a single, secure port; this allows an organization to create a secure firewall by preventing Internet access to internal machines, while allowing Web access.

public page

Any [page](#) in a [page group](#) that is viewable by [public users](#) (users who are not logged onto OracleAS Portal). The page manager or [page group administrator](#) must explicitly designate a page as public.

public user

User who can access, but is not logged onto, OracleAS Portal. When users first access OracleAS Portal, they do so as public users, whether or not they have the ability to log on. A public user can view any [page](#) that has been marked as public, but cannot customize or edit any content, or view pages that have any form of access control.

Contrast with [authenticated user](#).

purge

See [system purge](#).

query

A SQL SELECT statement that specifies which data to retrieve from one or more tables or views in a database.

quota

The amount of space provided in a page group or in the OracleAS Portal schema of the **Oracle Application Server Metadata Repository** to store uploaded documents.

recent object

An OracleAS Portal **object**, such as a **page** or **portlet**, that has recently been displayed or edited. Each **authenticated user** has his or her own Recent Objects portlet that provides links to the last *n* objects accessed.

referenced object

Export object category. An object which is directly or indirectly referenced by an **explicit object**.

See also **manifest**.

reference path

Path that uniquely identifies a **portlet** instance on a **page**. A reference path can be used to target **parameters** to individual portlets on a given page.

region

A carved-out area on a **standard page** used to define the page layout, define page content (**portlets** and **items**), and control the **style** and **attributes** for content displayed in a region. A standard page can have one or multiple regions. Regions can be created above, below, or beside other regions.

You can create the following types of regions:

- Undefined regions are regions that have not been assigned a particular type.
- Item type regions allow you to add items such as text, images, files, and so forth.
- Portlet type regions allow you to include portlets in a region.
- Sub-Page Links regions allow you to display a list of the current page's sub-pages in a region.
- Tab type regions allow you to include **tabs** in a region.

region banner

A colored, horizontal bar with a title displayed in a **region** of an OracleAS Portal **page**. A banner breaks up the visual flow of a page and groups related **items** that appear beneath it.

remote database

Database running on a separate machine that can be accessed over the network through a connect string or database link.

remote provider group

The collection of [providers](#) that are defined outside of your local instance of OracleAS Portal.

See [provider group](#). Contrast with [local provider group](#).

Replace on Import mode

Import mode. When this option is selected, if the object exists on the target, then it is replaced. If the object does not exist then it is created. When this option is not selected, if the object exists on the target, it is referenced. If it does not exist on the target, it is created.

report

An OracleAS Portal [portlet](#) that displays the results of a SQL [query](#) in a tabular format.

Reuse mode

See [Replace on Import mode](#).

rich text editor

A WYSIWIG editor that allows [content contributors](#) to easily apply formatting to text items. The rich text editor is only available in Internet Explorer.

root page

The top level of the [page](#) hierarchy in a [page group](#); it contains all other sub-pages in the page group. Also known as the page group's [home page](#).

routing method

OracleAS Portal provides three approval routing methods:

- All, Parallel enables OracleAS Portal to send the approval to recipients in the step all at the same time. All of the recipients must respond to the approval before the item approval can move to the next step.
- All, Serial enables OracleAS Portal to send the approval to recipients in the step one at a time in the sequence specified. All of the recipients must respond to the approval before the item approval can move to the next step.

- Any, Parallel enables OracleAS Portal to send the approval to recipients in the step all at the same time. However, only one of the recipients must respond to the approval before the item approval can move to the next step.

See also [approval process](#).

row

Set of values in a table; for example, the values representing one employee in the SCOTT.EMP table.

saved search

A saved search enables you to save all the search criteria under a single name. This feature allows you to repeat the search quickly, by choosing the saved search name rather than re-entering the criteria manually. You can save the results of a [basic search](#), [advanced search](#), or [custom search](#). The Saved Searches portlet lists all the saved searches in a page group.

search portlet

Enables users to search for [pages](#) and content within the OracleAS Portal schema of the [Oracle Application Server Metadata Repository](#). Users can also search based on text strings, categories, perspectives, and attributes, and using operators such as CONTAINS, GREATER THAN, LESS THAN, and EQUAL TO.

Contrast with [Oracle Ultra Search](#).

self registration

Allows users to create new accounts for themselves through a link in the Login portlet.

sequence

A database [object](#) used to automatically generate numbers for table rows.

servlet

A Java program that usually runs on a [Web server](#), extending the Web server's functionality. [HTTP](#) servlets take client HTTP requests, generate dynamic content (such as through querying a database), and provide an HTTP response.

session

See [portal session](#).

shared object

An OracleAS Portal **object** such as a **personal page**, **navigation page**, **style**, **page template**, **perspective**, **category**, or custom type that can be shared across **page groups**.

shared portlet

An OracleAS Portal **portlet** that is shared between other portlets in an OracleAS Portal **database provider**. Each shared portlet can be displayed on multiple **pages** with the same personalization.

Shared Screen mode

A **portlet show mode** that renders the body of the portlet. Every portlet must have at least a Shared Screen mode.

show mode

The ways by which a **portlet** can be called to display information. These methods include:

- **Shared Screen mode**
- **Edit mode**
- **Edit Defaults mode**
- **Preview mode**
- **Help mode**
- **About mode**
- **Link mode**
- **Full Screen mode**

simple file item type

A simplified version of the **file item type**, this item type includes fewer **attributes** and therefore is quicker and easier to create.

simple image item type

A simplified version of the **image item type**, this item type includes fewer **attributes** and therefore is quicker and easier to create.

Simple Object Access Protocol

See **SOAP**.

simple page link item type

A simplified version of the [page link item type](#), this item type includes fewer [attributes](#) and therefore is quicker and easier to create.

simple PL/SQL item type

A simplified version of the [PL/SQL item type](#), this item type includes fewer [attributes](#) and therefore is quicker and easier to create.

simple text item type

A simplified version of the [text item type](#), this item type includes fewer [attributes](#) and therefore is quicker and easier to create.

simple URL item type

A simplified version of the [URL item type](#), this item type includes fewer [attributes](#) and therefore is quicker and easier to create.

Single Sign-On

See [Oracle Application Server Single Sign-On Server](#).

smart link item type

See [Portal smart link item type](#).

smart text item type

See [Portal smart text item type](#).

snapshot

A [table](#) that contains the results of a [query](#) on one or more tables, called master tables, in a remote database.

snapshot log

A [table](#) associated with the master table of a [snapshot](#) tracking changes to the master table.

SOAP

Simple Object Access Protocol. A lightweight, [XML](#)-based protocol for exchanging information in a decentralized, distributed environment. SOAP supports different styles of information exchange, including: Remote Procedure Call style (RPC) and Message-oriented exchange. RPC style information exchange allows for request-response processing, where an endpoint receives a procedure oriented

message and replies with a correlated response message. Message-oriented information exchange supports organizations and applications that need to exchange business or other types of documents where a message is sent but the sender may not expect or wait for an immediate response.

SSL accelerator card

A hardware device that handles traffic much faster than regular SSL software.

See also [LBR](#).

SSO

Single Sign-On.

See [Oracle Application Server Single Sign-On Server](#).

standard page

A [page type](#) used to contain and manage [items](#) and [portlets](#).

stored procedure

A set of PL/SQL procedures that are stored in a database.

stripe

Secure slice on the [virtual private portal](#) that is assigned to a particular [subscriber](#).

structured UI template

A [shared portlet](#) that controls the look and feel of OracleAS Portal [portlet](#)s and runs in standalone mode. Structured UI templates display the same image and text in the same location around every portlet that uses the template.

See [user interface \(UI\) template](#). Contrast with [unstructured UI template](#).

style

A set of values and parameters that controls the colors and fonts of [pages](#) and [regions](#) within a page. Style settings include font style, size, color, alignment, and background color. Styles can be created for a specific [page group](#) or as a [shared object](#) that is used by pages within multiple page groups.

sub-category

A [category](#) that appears hierarchically below another (parent) category. This provides a way of grouping closely related categories together.

sub-item

An **item** that appears hierarchically below another (parent) item. This provides a way of grouping closely related items together, for example, the spreadsheet that is used by a particular HTML file item could be added as a sub-item of the HTML file item.

sub-page

A **page** that appears hierarchically below another (parent) page. Every page in a page group (except the root page) is a sub-page.

sub-perspective

A **perspective** that appears hierarchically below another (parent) perspective. This provides a way of grouping closely related perspectives together.

subscriber

Company that signs up with an **ASP** and receives a **stripe** on a hosted OracleAS Portal.

subscription notification

A method by which end users can subscribe to a particular **page** or **item** so that they are notified (via the My Notifications portlet) when that page or item is updated. The page designer must include a Subscribe **Portal smart link item type** for users to be able to subscribe to a page, and must display the Subscribe **attribute** for users to be able to subscribe to items. Additionally, the **page group administrator** must enable approvals and notifications for the **page group**.

substitution tag

Special portal tag used within **unstructured UI templates** to dynamically embed titles, headings, and other elements into the template.

survey

A set of questions used to find out information from users. Surveys can redirect users to different sections of the survey depending on their answers to particular questions.

Contrast with **poll** and **test**.

synonym

An additional name assigned to a **table** or **view** that can thereafter be used to refer to it.

system level caching

System level caching places a single copy of an object in the system cache (on the middle tier) for all users. Consequently, all customization options introduced by individual users on their own instance of the object are disabled. Also, access privileges for the object will not be enforced. Examples of content that may be suitable for system level caching include page banners and news portlets.

system purge

Deletes all items in a [page group](#) from the OracleAS Portal schema of the [Oracle Application Server Metadata Repository](#) that are marked as deleted or expired. System purges are performed by the [page group administrator](#) or [portal administrator](#).

tab

An area on a [page](#) used to increase the amount of content that the page can display by effectively doubling (or tripling, quadrupling, and so on) the amount of real estate available. Tabs also allow you to group content that are common to a subject area, organization, specific role, and so forth.

table

The basic storage structure in a relational database.

tablespace

Allocation of space in the database.

template

See [page template](#) or [user interface \(UI\) template](#).

temporary tablespace

Allocation of space in the database used for the creation of temporary table segments for operations such as sorting table rows.

test

A set of questions used to assess a user's understanding of a particular subject or subjects. You can provide the correct answer for questions and assign each question a score. You can also hand score essay-type answers.

Contrast with [poll](#) and [survey](#).

text item type

One of the default **item types** that a **content contributor** can add to a **page**. When you create a text item, you enter text (up to 32KB) in the Item Wizard. The text block is then stored in the OracleAS Portal schema of the **Oracle Application Server Metadata Repository**.

theme

A snapshot generated by **Oracle Text** that describes a document. Rather than searching for documents that contain specific words or phrases, users can use Oracle Text to search for documents that are about a certain subject, even if that subject is not mentioned explicitly in the document.

title

See **display name**.

translation

A **page group** rendered in another language. When a **page group administrator** creates a translation, **content contributors** can add content in that language. Page group users can also view the translated content by setting their browser language to one of the supported languages.

transport set

A transport set is a collection of OracleAS Portal **objects** for **export** or **import**. It can contain more than one object of a particular type, such as multiple **page groups** and multiple **pages**.

trigger

A database **object** associated with a table. It executes before or after one or more specified events.

Ultra Search

See **Oracle Ultra Search**.

Uniform Resource Locator

See **URL**.

unstructured UI template

A **shared portlet** that is used to insert content and **HTML** code into a specified **page** or control the look and feel of OracleAS Portal **portlet**s. Unstructured UI templates

are based on HTML code that, when executed, dynamically embeds titles, headings, and other elements that make up a page.

See also [substitution tag](#) and [user interface \(UI\) template](#). Contrast with [structured UI template](#).

URL

Uniform Resource Locator. A compact string representation of the location for a resource that is available via the Internet. It is also the format Web clients use to encode requests to [Oracle Application Server](#).

URL item type

One of the default [item types](#) that a [content contributor](#) can add to a [page](#). A URL item, when clicked, provides a route to another Web page. When a user clicks the URL item's [display name](#), the Web page referenced by the [URL](#) displays.

URL page

A [page type](#) that provides a route to another Web page, identified by its [URL](#). When a user clicks the page link, the Web page referenced by the link is displayed.

URL portlet

An OracleAS Portal [portlet](#) that displays the contents of a Web page specified by a [URL](#).

user interface (UI) template

A [shared portlet](#) that controls the look and feel of OracleAS Portal [portlet](#)s in full page display mode. Selecting a UI template when you are building a portlet automatically selects a title on the page where the portlet is displayed, a title background, links to other Web pages, and background colors and images.

See also [structured UI template](#) and [unstructured UI template](#). Contrast with [page template](#).

validation-based caching

A [caching](#) method that is performed using the [portal cache](#). Before an item in the portal cache is used, the [PPE](#), or [mod_plsql](#), contacts the portal or a [provider](#) to determine if the cached item is still valid.

Contrast with [expiry-based caching](#) and [invalidation-based caching](#).

versioning

Allows multiple versions of an [item](#) to simultaneously exist in the OracleAS Portal schema of the [Oracle Application Server Metadata Repository](#). This feature is useful for tracking document changes from one version to the next or for reverting to a previous version if necessary.

view

A virtual [table](#) whose rows do not actually exist in the database, but which is based on a table that is physically stored in the database.

View mode

Runtime view of a [page](#).

Contrast with [Edit mode](#).

virtual private database

See [VPD](#).

virtual private portal

Refers to the OracleAS Portal features for hosting multiple companies or multiple organizations securely within the same portal instance.

VPD

Virtual Private Database. A feature for [ASPs](#) that want to leverage the Oracle database to host their customers. Essentially, it uses one physical database instance for all customers, but to each customer it looks like they have their own database. Users cannot see any information that is not meant for them and complete customer isolation is achieved. It requires little to no changes in the core application to take effect as most of the work is done at the database level. Implementing VPD basically requires two key steps: adding a context column (e.g., company name) to all the database tables, and implementing a policy to restrict queries on each table based on the context of the logged in user. VPD provides highly secure, full subscriber isolation using this method.

WAP

Wireless Application Protocol. A set of open, global protocols for developing applications and services that use wireless networks.

Web Cache

See [Oracle Application Server Web Cache](#).

Web clipping

Enables page designers to collect Web content into a single centralized portal. It can be used to consolidate content from hundreds of different Web sites scattered throughout a large organization.

WebDAV

Web-based Distributed Authoring and Versioning. A protocol extension to [HTTP](#) 1.1 that supports distributed authoring and versioning. With WebDAV, the Internet becomes a transparent read and write medium, where content can be checked out, edited, and checked into a [URL](#) address.

Web provider

An entity that is called, via an [HTTP](#) request, by OracleAS Portal and returns [portlet](#) content in [HTML](#), [XML](#), or [WML](#). A Web provider acts as a proxy for one or more portlets that are defined within a particular application environment (e.g., Java, ASP, or Perl) and executed as applications external to OracleAS Portal. Web providers are particularly appropriate for Web-accessible information sources.

See also [provider](#). Contrast with [database provider](#).

Web server

A program that delivers Web pages.

Wireless Application Protocol

See [WAP](#).

Wireless Markup Language

See [WML](#).

wireless portal

A [portal](#) accessible from wireless devices, such as cellular telephones.

See also [Oracle Application Server Wireless](#).

wizard

Graphical interface that guides a user step-by-step through a process. In OracleAS Portal, wizards are used for creating [database providers](#), [portlets](#), database [objects](#), [pages](#), [page groups](#), and [items](#).

WML

Wireless Markup Language. An **XML**-based markup language used to define hypertext-like content and applications for handheld devices.

XML

Extensible Markup Language. An open standard for describing data using a subset of the SGML syntax.

XML portlet

An OracleAS Portal **portlet** that displays the executed results of **XML** code. To create the portlet, you either specify XML code or a **URL** that points to the XML code.

zip file item type

One of the default **item types** that a **content contributor** can add to a **page**. Zip file items enable you to upload many files in a single operation. You can use them to migrate the contents of a file system or Web site into the OracleAS Portal schema of the **Oracle Application Server Metadata Repository**. When you upload a zip file to OracleAS Portal, then unzip the uploaded file, a page is created for each directory and an **item** is created for each file. The items are published in the target page.

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