

**Oracle® Instant Portal**

Getting Started

10g Release 2 (10.1.2)

**Part No. B15879-01**

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Oracle Instant Portal Getting Started, 10g Release 2 (10.1.2)

Part No. B15879-01

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## **Oracle Instant Portal Getting Started, 10g Release 2 (10.1.2)**

**Part No. B15879-01**

Oracle 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?
- Is the information clearly presented?
- Do you need more information? If so, where?
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500 Oracle Parkway, M/S 10p5  
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# Preface

This manual introduces you to Oracle Instant Portal and provides you with a high level understanding of *what* you can accomplish with the product. To find out *how* to complete a task, see the Oracle Instant Portal online help system for step-by-step instructions.

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**Note:** Only the tasks documented in the Oracle Instant Portal help system (and this manual) are supported by Oracle. Altering or extending the functionality of Oracle Instant Portal through undocumented procedures is not supported.

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## Intended Audience

This manual is intended for anyone who is responsible for preparing Oracle Instant Portal for others to publish and share information.

## 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 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/>

## Related Documents

For more information, see the following manuals in the Oracle Application Server Standard Edition One documentation set:

- *Oracle Application Server Installing and Getting Started with Standard Edition One*

## Conventions

The following conventions are also used in this manual:

Convention	Meaning
. . .	Vertical ellipsis points in an example mean that information not directly related to the example has been omitted.
...	Horizontal ellipsis points in statements or commands mean that parts of the statement or command not directly related to the example have been omitted
<i>italicized text</i>	Italicized type in text indicates a term defined in the text, the glossary, or in both locations.
< >	Angle brackets enclose user-supplied names.
[ ]	Brackets enclose optional clauses from which you can choose one or none.

## Browser Recommendations

Oracle Instant Portal supports the use of the following browsers:

- Netscape 7.2 or later
- Internet Explorer 6.0 or later
- Mozilla Firefox 1.0.4 or later

It is preferred that you use Internet Explorer to edit and manage your portal. Although Netscape and Firefox work well for viewing pages, there are some known issues regarding their performance while editing, especially where tables are concerned. In addition, when adding text items, you'll find that the HTML source looks different in Mozilla than it does in Internet Explorer.

To ensure that your browser's Back button behaves as expected, make sure your browser settings are set so that pages are automatically refreshed each time they are changed. In Internet Explorer, this can be accomplished by doing the following:

1. From your browser menu, select **Tools->Internet Options**.
2. In the **Temporary Internet Files** area, click **Settings**.
3. Under **Check for newer versions of stored pages**, make sure the **Automatically** radio button is selected.

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# Getting Started with Oracle Instant Portal

This document acquaints you with the basic concepts and terminology you'll need to use Oracle Instant Portal effectively. For detailed instructions on how to accomplish specific tasks within Oracle Instant Portal, see the product's online help.

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**Note:** This book assumes that the Oracle Application Server 10g Release 2 (10.1.2) Standard Edition One installation process has been completed. See *Oracle Application Server Installing and Getting Started with Standard Edition One* for installation instructions if you need them.

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## 1.1 What Is Oracle Instant Portal?

Oracle Instant Portal is a key component of Oracle Application Server 10g Release 2 (10.1.2) Standard Edition One. Whereas Oracle Application Server Enterprise Edition offers a comprehensive platform to build, integrate, deploy, and manage large-scale applications, Oracle Application Server 10g Release 2 (10.1.2) Standard Edition One optimizes these benefits for smaller organizations, such as small-to-medium enterprises, individual departments of larger corporations, or mid-market ISVs. Oracle Instant Portal provides instant out-of-the-box portals for secure publishing and content sharing, ideal for enterprises with a need for smaller-scale intranets or an internal communications hub. With Oracle Instant Portal, you can have a functioning portal in less than an hour. Consider these benefits:

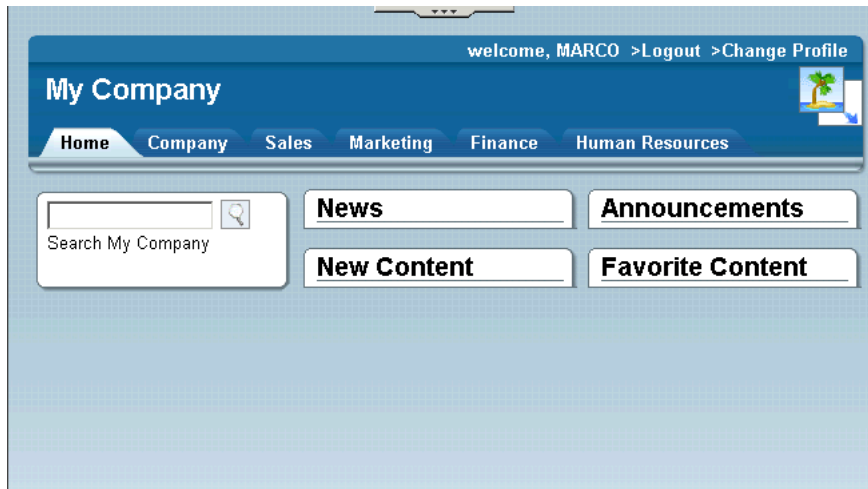
- Pre-created, preconfigured pages mean no initial development costs. Pages are ready to start loading with content right away.
- Pre-configured home page displays news, announcements, and newly added content. Plus, each user has an area for their favorite content, selected through simple personalization tools.
- Point-and-click operations let you easily manage pages, contribute and manage content, and create and manage user accounts.
- Intuitive user interface is extremely easy to learn and easy to use.
- In-place editing provides a simple, WYSIWYG (what-you-see-is-what-you-get) editing experience right on the page.

Perhaps the best way to begin to understand Oracle Instant Portal and what it can do for you is to take a look at what you get once the installation process is finished.

## 1.1.1 What Do You Get Out Of the Box?

Your first Oracle Instant Portal is created for you automatically, as part of the Oracle Application Server 10g Release 2 (10.1.2) Standard Edition One installation process. When you complete that process, you're taken to the home page of your first portal, which by default looks like this:

**Figure 1–1** Default Home Page



As you can see, right out of the box you're presented with a fully functioning, albeit simple portal, ready for you to start adding content. Let's take a quick tour of the home page and talk about some of the changes you may wish to make there.

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**Note:** By default, the password for this portal is whatever was entered for the ORCLADMIN user during installation. You can use the Change Profile link to change the password.

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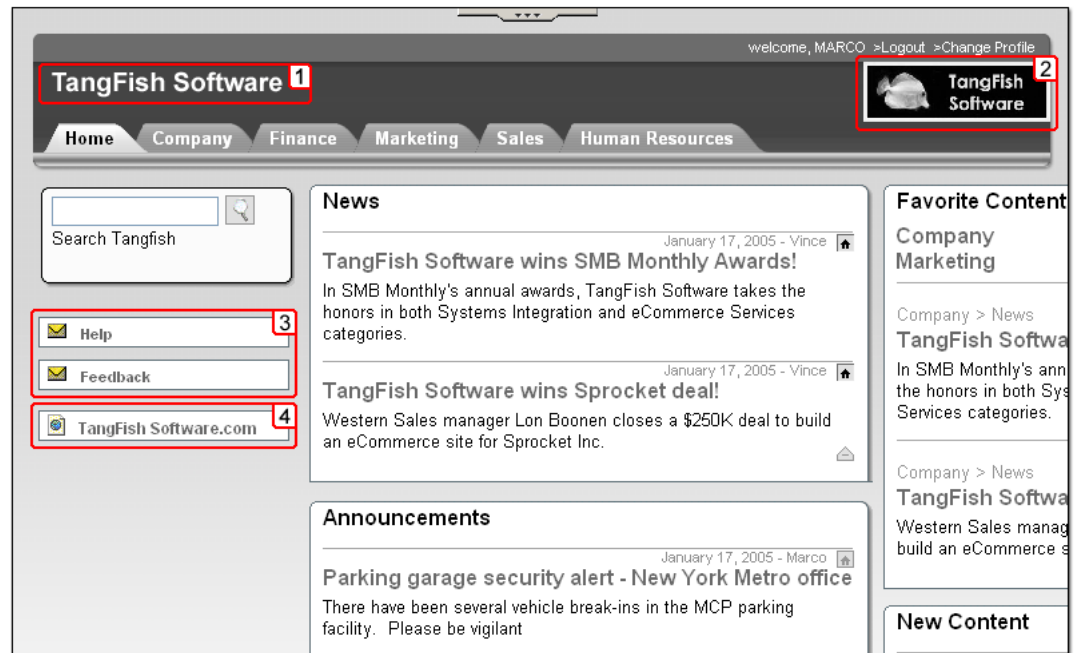
### Familiarizing Yourself with the Home Page

Like all home pages, the Oracle Instant Portal home page is intended to be a central access point for items of interest to all users of the portal. To make things easier, the body of the page is divided into four distinct areas in which those items can appear:

- **News:** Items pertaining to events occurring in your industry, for example, or at a corporate level.
- **Announcements:** Items that remind or inform people of upcoming events within your company or department.
- **New Content:** Items that were added anywhere within the portal over the last seven days. The New Content area is automatically populated; you don't have to do a thing.
- **Favorite Content:** Content unique to each user. As users move through the portal, they can flag content they want to see on their home page by clicking a simple icon that appears beside each item.

Now let's see a home page that has undergone a bit of customization at a fictitious company, TangFish Software:

Figure 1–2 Customized Home Page



The Oracle Instant Portal administrator at TangFish Software has customized this page to reflect the company's identity in several ways:

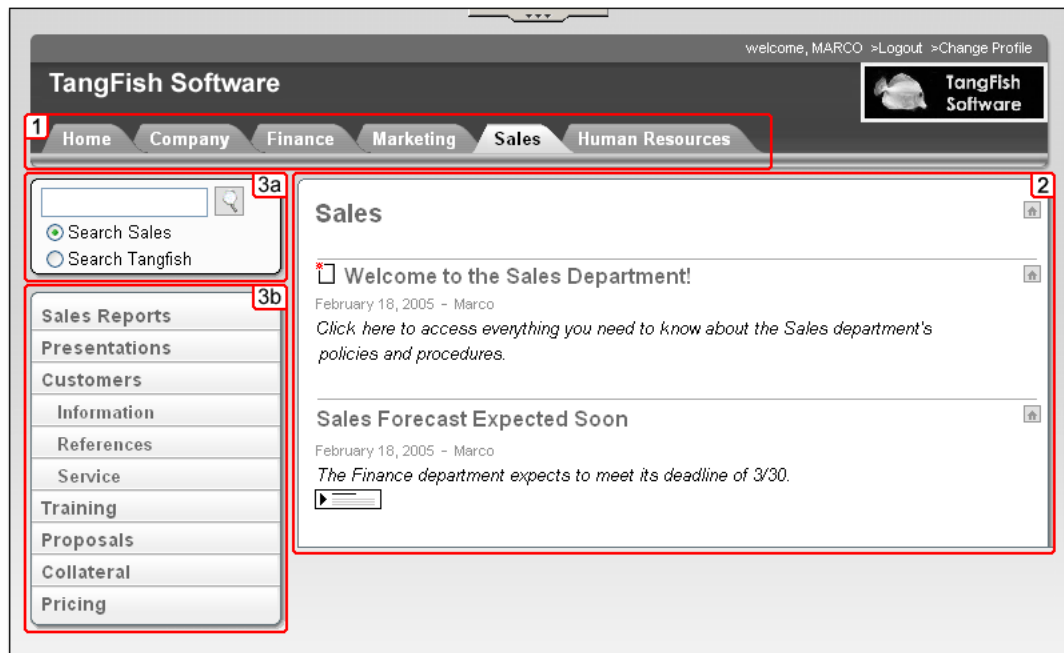
1. The name of the company appears in the banner.
2. The company's official logo also appears in the banner.
3. Along the left side of the page, the administrator added links to email addresses for TangFish's Support and Feedback groups, so that users can access them quickly.
4. A link to the company's corporate Web site was added at the bottom of the page.

These are all things the administrator did explicitly. If you're the Oracle Instant Portal administrator, you'll probably want to make similar kinds of customizations to your own home page. Before you begin doing so, however, take a moment to read the next section and arm yourself with an understanding of the basic principles of how Oracle Instant Portal works.

### Understanding Oracle Instant Portal

Let's take a look at another page from TangFish Software's portal to help illustrate some basic Oracle Instant Portal concepts:

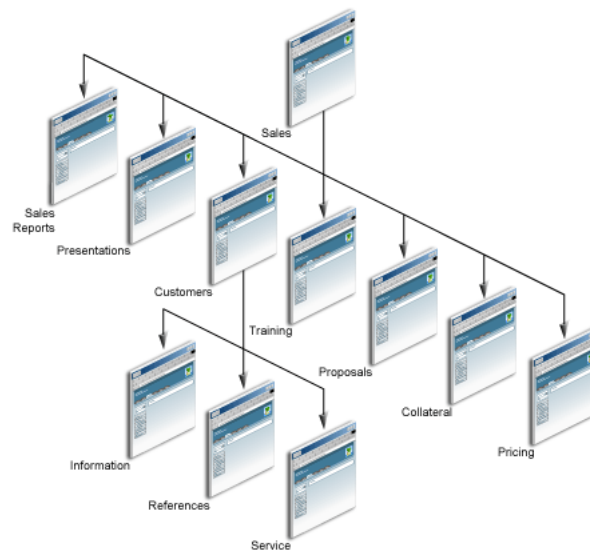
**Figure 1–3 Basic Oracle Instant Portal Concepts**



1. For TangFish Software, the default tabs along the top (Company, Finance, Marketing, and so forth) are perfectly suited to their goals, as they wish to create a company-wide intranet that includes these organizations. (The administrator did re-order the tabs slightly, however.) This may be the case for your group as well, or you might want to rename the tabs and/or create new ones to better reflect your organization. A travel agency, say, might find that tabs named Hotels, Restaurants, Air Fares, and Rental Cars are more closely aligned with the kind of work they do.
2. When you click a tab, a page called a *top-level page* is displayed. In this example, the content of the Sales top-level page is displayed on the right side of the page, which is called the *content area*. Although the Sales page is populated with content in this example, by default all top-level pages are empty, waiting for you and your users to load them with content.
3. Notice the *navigation area* on the left, which appears on every page (except the home page). The navigation area contains:

- a. The search box, which enables you to search the entire portal for a given string, or limit your search to a single top-level page.
- b. A list of the *child pages* for the current page. For the Sales top-level page, these pages are called Sales Reports, Presentations, Customers, and so on. Child pages are pages you create below a top-level page to organize the content associated with the larger theme, just as folders and sub-folders are used to organize content on your Windows desktop.

You can see how all of the Sales page's child pages clearly support the Sales organization. In fact, every top-level page comes with its own set of pre-created pages, designed to help you organize your work within that theme. And because each child page can have its own child pages (the Customers page has three), you can easily create a hierarchy to neatly organize all of your content. The Sales hierarchy, for example, looks like this:

**Figure 1–4 The Sales Hierarchy**

Now that you understand the concept of top-level and child pages, let's return to the home page for a moment. Recall that the content that appears there is simply a collection of content from other places. The News and Announcements areas of the home page are actually populated by two child pages of the Company page, as illustrated here:

**Figure 1–5 Child Pages of the Company Page**

By default, the Company page comes with two child pages, News and Announcements. Whatever you place on those pages also appears in the News and Announcements areas on the home page.

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**Note:** If you don't like the names of the News and Announcements pages, you can easily change them to names that more closely reflect the kinds of content you want to display on your home page. As soon as you change the name of the page, the name of the corresponding area on the home page changes as well.

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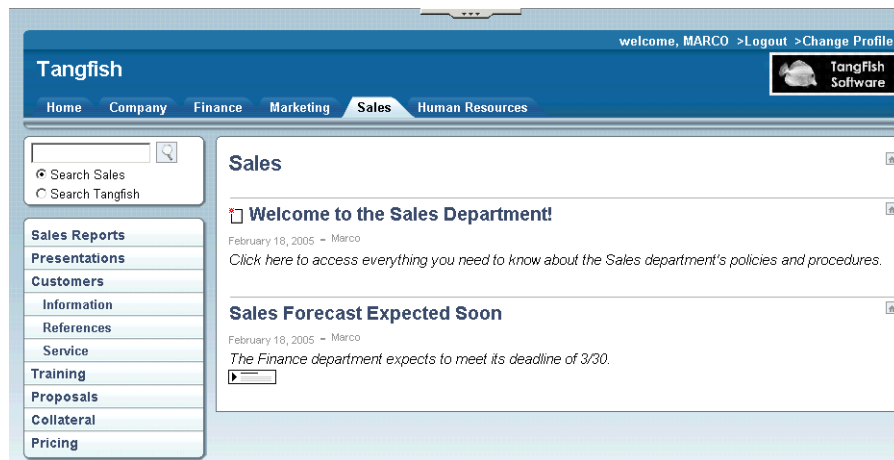
## 1.2 What Can You Do with Oracle Instant Portal?

As you begin working with Oracle Instant Portal, you'll immediately see how quickly you can customize the portal to reflect your organization. As time goes on, you'll find that it's simple to administer the portal, and extremely easy for your users to come up to speed with it and to start contributing and sharing content. Let's take a look at some of these tasks.

### 1.2.1 Contributing Content

Here again is the sample page from the TangFish Software portal:

**Figure 1-6 Sample Page from TangFish Software Portal**

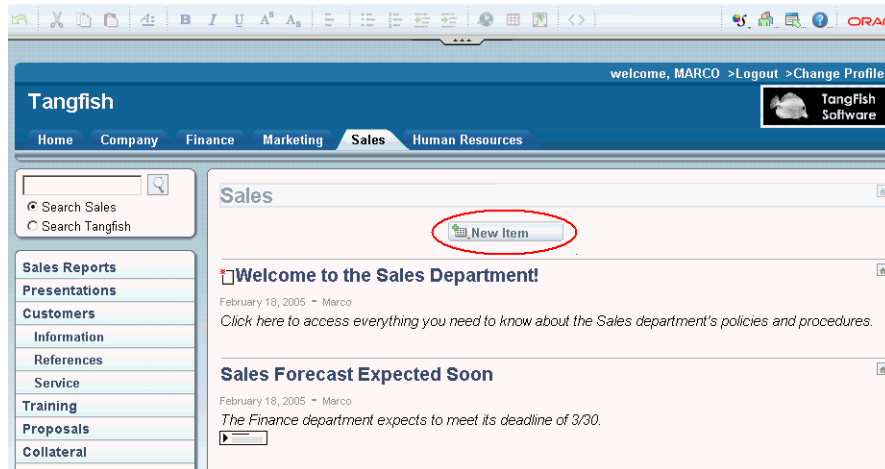


Each block of text delineated by horizontal lines is an *item* within the portal. In this example, there are two items: "Welcome to the Sales Department" and "Sales Forecast Expected Soon". Items are the means through which you add content to your portal. You can add items to the portal by clicking the Edit Mode icon, which is located at the top of every Oracle Instant Portal page. You will see the Edit Mode icon, shown subsequently, only if you have the privileges to add content to the page:



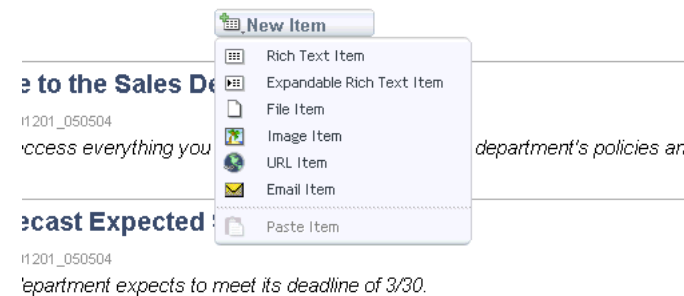
(More about privileges later.) Once you are in edit mode, you'll see the New Item button, located in the content area:

**Figure 1–7 New Item Button in the Content Area**



When you click the New Item button, a list of item types is displayed:

**Figure 1–8 List of Item Types**



The type of item you select depends upon the kind of content you want to add, as described in the following table:

**Table 1–1 Items in Oracle Instant Portal**

If you have this kind of content...	Add this type of item
Longer text	Expandable Rich Text item. Apart from a title and summary, the actual text of the item is not displayed until the user reveals it by clicking an icon. For this reason, Expandable Rich Text items are ideal for conserving real estate on the page.
Shorter text, such as a news item	Rich Text item. A title, a summary, and the text in its entirety is displayed directly on the page.
Content that already exists in a separate file, such as a .doc or html file	File item. A title, a summary, and an icon that looks like a file are displayed on the page. When the user clicks the icon, the file you named opens in a secondary browser window.  The file is uploaded to the <i>portal repository</i> , a central clearing house for content stored in portals.

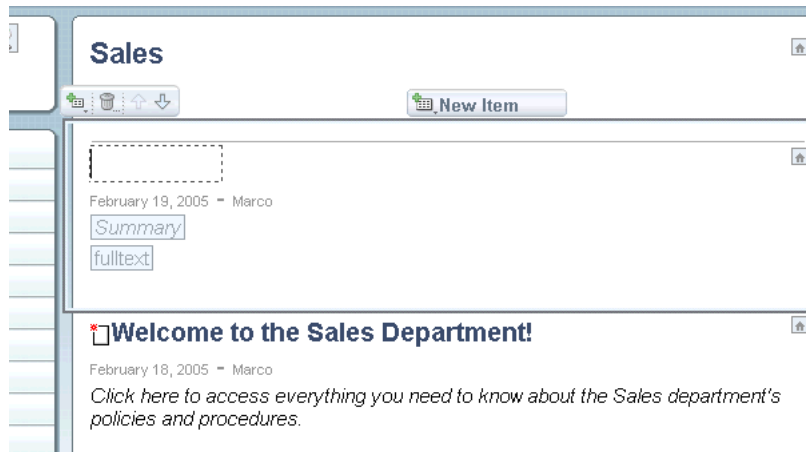
**Table 1–1 (Cont.) Items in Oracle Instant Portal**

If you have this kind of content...	Add this type of item
A picture or graphic image	Image item. The image appears on the page itself, along with an optional title and description.  The image is uploaded to the portal repository.
Another location, either internal or external to your Oracle Instant Portal	URL item. A title, description, and an icon that looks like a globe appears on the page. When the user clicks the globe, the destination you named opens in a secondary window.  The TangFish home page, for example, has a URL item that takes users to the TangFish corporate Web site.
An email, pre-seeded with an address	Email item. A title and an icon that looks like an envelope appears on the page. When the user clicks the icon, an email editor displays a blank email, already addressed to the person or organization you named.

Once you select the type of item you want to add, all you have to do is follow the prompts to supply the necessary information. For example, when you add a File item, you are prompted for the file you want to upload. Once you confirm the file name, the file is uploaded to the portal repository. Then you can add the title and summary text to the page so that others can understand what you just uploaded.

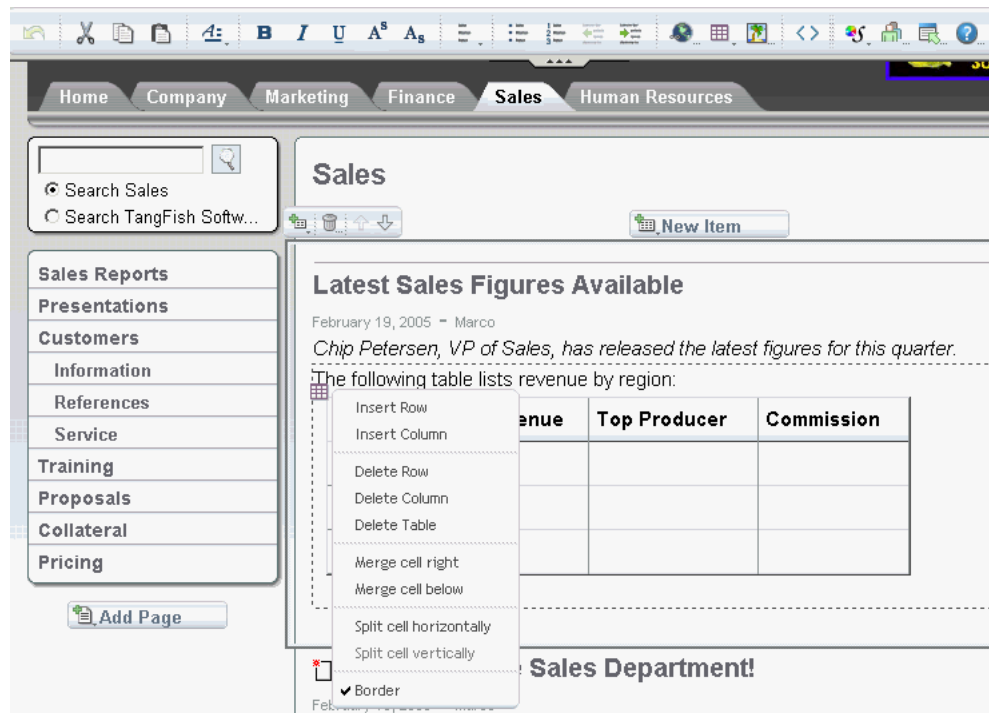
The first time you add a Rich Text or Expandable Rich Text item, you'll be impressed by how Oracle Instant Portal's *in-place editing* capabilities drastically simplify the task. As soon as you add an item, it appears on the page in context, ready for you to begin editing:

**Figure 1–9 In-Place Editing Capability**



Now you can start entering the title, the summary, and the text of the item, exactly as it will appear to your users. And while you're writing your text, you have access to a full range of text editing controls, including bulleted lists, numbered lists, tables, cut and paste, indents and outdents, and so on. You can even work directly with HTML code, or switch back and forth between modes as you need to. You can also enrich your text by including images, hyperlinks, and tables. In this example, a table is being added, which can be populated and/or modified using standard table editing tools:

Figure 1–10 Sample Table Addition in Internet Explorer



To give you the flexibility you need, Oracle Instant Portal enables you to cut and copy items, move items to different pages, delete items—all the tools you need to develop content-rich portals and allow you to manage and share that content with others. And if something isn't quite right with what you've done, you can use the Revert key to restore the portal to the way it was before you started editing.

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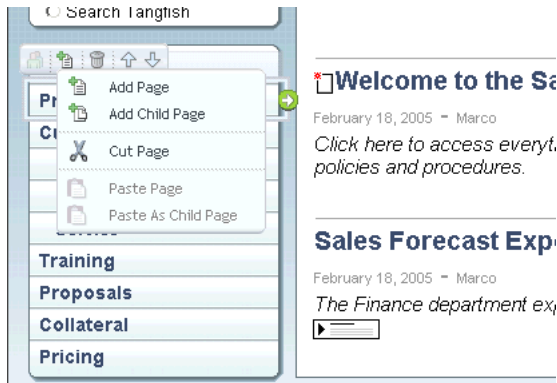
**Note:** If you have WebDAV enabled, you can add your Oracle Instant Portal as a Web folder and interact with it right from your desktop.

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## 1.2.2 Creating New Pages

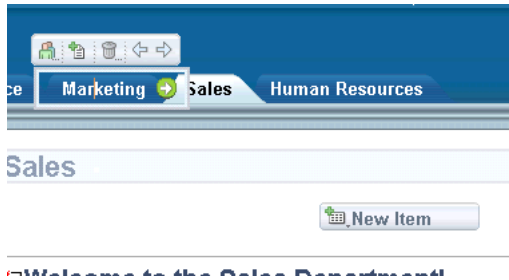
It's just as easy to add top-level pages and child pages in Oracle Instant Portal as it is to add items. One of the aspects of Oracle Instant Portal that makes it so simple to use is that navigation and creation are inextricably linked. You don't have to create an entity and then introduce that entity later into an existing structure. Everything is done in context. For example, you can create child pages right in the navigation area, then use simple controls to reposition, edit, or delete that page:

**Figure 1–11 Creating Child Pages in the Navigation Area**



Similarly, Oracle Instant Portal administrators can add, delete, or edit top-level pages right in context:

**Figure 1–12 Top-Level Pages**



## 1.2.3 Administering Oracle Instant Portal

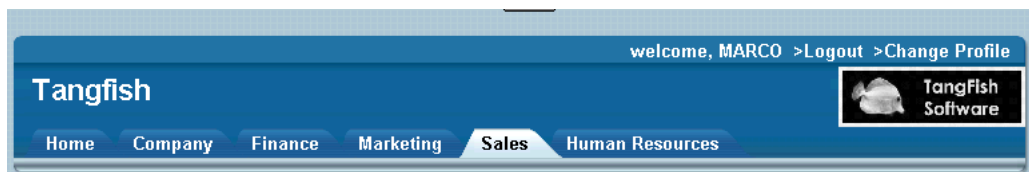
Managing an Oracle Instant Portal is far less complicated and takes significantly less time than managing a full-scale enterprise portal. With just a few simple steps, you can brand your portal with your corporate identity, select a color scheme for your portal, and set up accounts for all your users.

**Tip:** If you're the Oracle Instant Portal administrator, look for the topic called "Setting Up Oracle Instant Portal: A checklist" in the online help for a complete list of the customization options available to you.

### 1.2.3.1 Customizing the Look and Feel

There are three main ways in which to brand your portal, two of which occur in the portal's banner. The banner is the top region of the page, which is identical for every page within the portal. Here is an example of a typical banner:

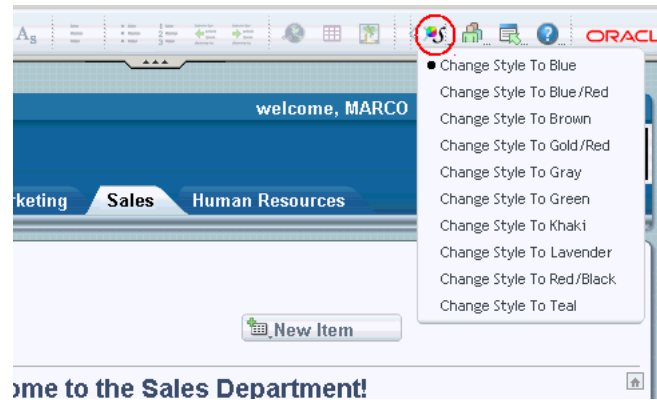
**Figure 1–13 Banner in a Page in a Portal**



The Welcome link at the top of the banner contains the name of the logged in user (in this example, MARCO), along with links to log out of the portal and to change aspects of the user's profile. You can also add your own corporate logo to the right of the banner, and provide a name for the portal on the left.

Selecting a style for your portal is equally easy. By clicking the style icon, you can display ten different styles, each centered around a different color scheme. As you run your cursor down the list, you can instantly see how your portal appears in each color. When you select the one you want, the entire portal is rendered in that color scheme for every user.

**Figure 1–14 Style Icon on a Portal Page**



### 1.2.3.2 Controlling Access to Your Portal

Creating users and managing the roles they are to play within the portal can be an arduous task. In Oracle Instant Portal, however, a simple security model protects your content without placing an undue burden on you, the administrator.

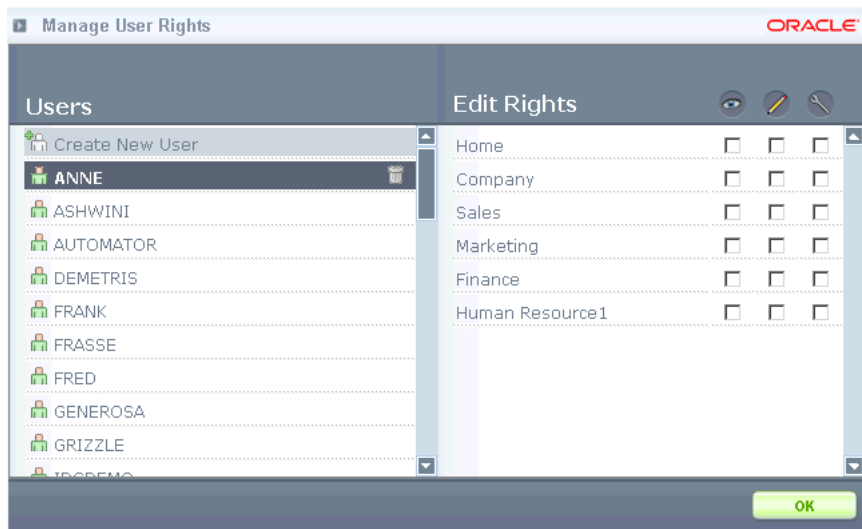
A single user can have a different level of security for each top-level page within the portal: View, Contribute, or Manage.

- View privileges allow the user to view content on the page.
- Contribute privileges allow the user to add items to the page.
- Manage privileges give the user full permissions over the page, including the ability to add child pages.

The privileges you set for a top-level page cascade down to the child pages as well.

Users are created and their permissions are managed through a single, easy-to-use dialog:

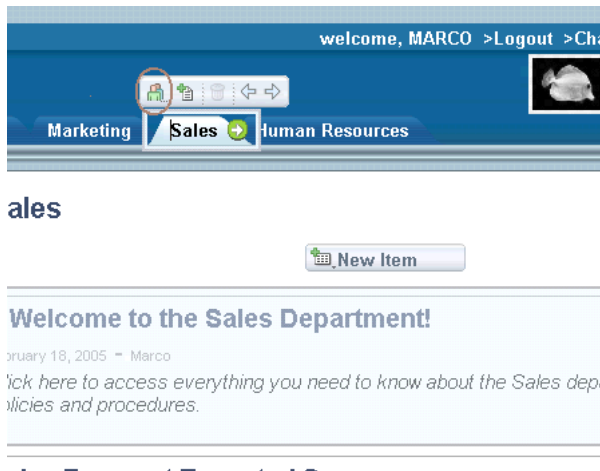
**Figure 1–15 Dialog to Create Users and Their Permissions**



The left pane lists all registered users, while the pane on the right lists all the pages in the portal. When you select a user on the left, the pane on the right reflects that user’s privilege level for each page in the portal. Granting or revoking privileges is as simple as checking or unchecking a box.

You can also control access to a page from the page itself, by clicking the Manage Page Privileges icon (circled below):

**Figure 1–16 Manage Page Privileges Icon**



The Manage Page Privileges window looks similar to the Manage User Rights window, but the privileges you can set there are restricted to the page from which it was launched.

When a user is granted Manage privileges on any portal's home page, that user is considered an Oracle Instant Portal administrator and has full privileges over that particular portal. Additionally, the Oracle Instant Portal administrator can:

- Create new users.

- Delete any user in the Manage User Rights dialog, even those he or she did not create. (For this reason, it's wise to restrict the number of users who have Manage privileges on a home page.)
- Create new Oracle Instant Portals.

Users that were created through OracleAS Portal can also have access to Oracle Instant Portals, as long as you first add the users to the OIP\_AVAILABLE\_USERS group. Then you can use the Manage User Rights dialog to grant appropriate privilege levels to the users.

**1.2.3.2.1 What Users Are Created by Default?** During the Oracle Application Server Standard Edition One installation process, the following user/groups are created:

- User called PORTAL, who is an Oracle Instant Portal administrator for all Oracle Instant Portals.
- User called ORCLADMIN, who is an Oracle Instant Portal administrator for all Oracle Instant Portals.
- Group called OIP\_USER\_ADMINS (List of users who can create new Oracle Instant Portals and perform user administration. Both PORTAL and ORCLADMIN are members of this group.)
- Group called OIP\_AVAILABLE\_USERS (List of users who can access Oracle Instant Portals, which appears in the Manage User Rights dialog. Neither PORTAL nor ORCLADMIN are in this group; thus, they do not appear on the Manage User Rights dialog. This protects these important user IDs from accidental deletion.)

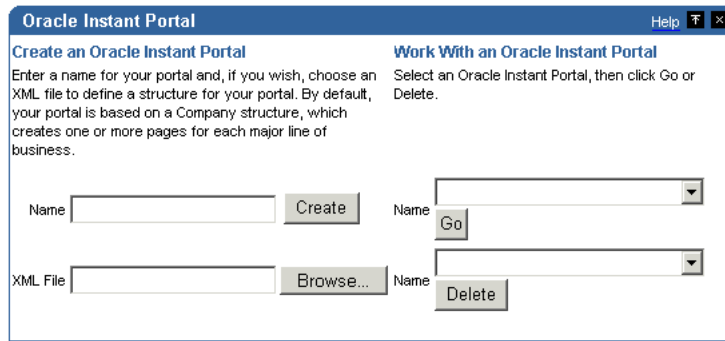
### 1.2.3.3 Creating New Portals

You may find that you need more than one instance of Oracle Instant Portal to fulfill your needs. You may want Sales, Marketing, and Development to have their own portals, for example, or perhaps you want to set up separate portals to exchange information with your suppliers or customers. Generating new instances of Oracle Instant Portal is easy. Simply click the Portal Builder link in the Edit Mode toolbar:

**Figure 1–17 Portal Builder Link in the Edit Mode Toolbar**



This link takes you into OracleAS Portal, through which you can access the Oracle Instant Portal portlet:

**Figure 1–18 Link that Accesses the Oracle Instant Portal Portlet**

The screenshot shows a web application window titled "Oracle Instant Portal" with a "Help" icon and window controls. The interface is split into two columns:

- Create an Oracle Instant Portal:** Contains a text input field for "Name" with a "Create" button, and an "XML File" input field with a "Browse..." button. Below the "Name" field is a descriptive paragraph: "Enter a name for your portal and, if you wish, choose an XML file to define a structure for your portal. By default, your portal is based on a Company structure, which creates one or more pages for each major line of business."
- Work With an Oracle Instant Portal:** Contains a "Name" dropdown menu with a "Go" button, and another "Name" dropdown menu with a "Delete" button. Below the first dropdown is the instruction: "Select an Oracle Instant Portal, then click Go or Delete."

With this portlet you can create new portals, navigate between your portals, or delete portals you no longer need—assuming you have the appropriate privileges. You can also write an XML file to dictate the structure of your portal, rather than accepting the default company theme of Marketing, Sales, Finance, and so on.

### 1.3 What's Next?

Now that you're familiar with the basics of Oracle Instant Portal, you're ready to begin using it! Assuming that you're the Oracle Instant Portal administrator, check out the online help to find out exactly how to customize your instance of Oracle Instant Portal as described in this document.

You'll find that most tasks within Oracle Instant Portal are completed through steps that are quick, easy, and largely intuitive. That means that most of your users will be independent almost immediately, and few will have to spend valuable time experimenting or consulting the documentation to see how to complete a given task.

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# Glossary

## **child page**

Page created beneath a *top-level page*. Child pages are listed along the left side of the top-level page to which they belong, in the *navigation area*, and usually support the top-level page's main theme. You can add, delete, re-position, or edit child pages right in the navigation area, assuming you have the appropriate privileges.

## **content area**

Area in which a page's items (or *content*) appear, on the right side of the screen.

## **Contribute privileges**

Privilege level on a page that allows the user to add, edit, move, or delete items on the page. A user with Contribute privileges also has all View privileges.

## **edit mode**

Opposite of *view mode*. When the Edit Mode handle bar is clicked, thus displaying the edit toolbar and the Add Item and Add Page icons, the page is said to be in edit mode. This is the only state in which action may be taken upon the page.

## **Edit Mode icon**

The gray icon that, when clicked, displays the edit toolbar. When the edit toolbar is displayed, the page is in *edit mode*. Users with *View privileges* on the page do not see the Edit Mode icon.

## **Email item**

Item represented by a yellow envelope and, optionally, a title on the page. When the user clicks the envelope, an email editor is opened displaying a blank email. The email is pre-populated with the address specified by the item's creator.

## **Expandable Rich Text item**

Text item designed to conserve real estate on the page. When in view mode, an Expandable Rich Text item is represented by a white envelope, a title, and a summary. When the user clicks the envelope, the item expands to reveal the text associated with the item. Compare to a *Rich Text item*, in which the full text of the item is never hidden. Both Expandable Rich Text and Rich Text items may contain images, hyperlinks, and tables, as well as any valid HTML code.

## **Favorite Content area**

Area on the home page in which a user's favorite content appears. Users select items for this area by clicking the icon that looks like a house beside the item. The Favorite Content area is different for every user.

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**File item**

Item represented by a rectangle with a red asterisk at the top and, optionally, a title and summary. When the user clicks the icon, the file associated with the item opens in a secondary browser window.

**Image item**

Image that is designed to stand alone on the page, as opposed to the images that are added as part of a Rich Text or Expandable Rich Text item. An Image item is added through the Add Item icon; an image that is part of a text item is added through the Insert Image window.

**in-place editing**

The ability to add items or pages in context, as opposed to having to create these objects elsewhere and then add them to the page.

**item**

The means through which content is added to an Oracle Instant Portal page. Available item types are Rich Text, Expandable Rich Text, Email, URL, File, and Image items.

**Manage privileges**

Privilege level on a page that allows the user to edit, move, or delete a top-level page and all its child pages. A user with Manage privileges also has all Contribute and View privileges.

**navigation area**

Area along the left side of a page, in which the search box and a list of the page's child pages appear.

**New Content area**

Area on the home page in which content added anywhere in the portal over the last 24 hours is gathered.

**Oracle Instant Portal administrator**

User that has full privileges over the entire portal. Any user with Manage privileges on the portal's home page is considered an Oracle Instant Portal administrator for that portal. The PORTAL and ORCLADMIN users, created during the installation process, are Oracle Instant Portal administrators. Only an Oracle Instant Portal administrator can change the banner or style, manage users, and create new top-level pages.

**portal repository**

Central location to which File and Image items are uploaded.

**Rich Text item**

Text item designed for smaller blocks of text. A Rich Text item appears on the page as a title, a summary, and the full text of the item. Compare to *Expandable Rich Text* items, in which the text is hidden until the user clicks an icon. Both Expandable Rich Text and Rich Text items may contain images, hyperlinks, and tables, as well as any valid HTML code.

**top-level page**

Page that has a tab in the portal's tab set. May contain one or more *child pages*. Page privileges applied to a top-level page are also applied to all its child pages.

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**URL item**

Item represented by a globe icon and, optionally, a title and summary. When the user clicks the globe, the location specified in the item opens in a secondary browser window.

**view mode**

Opposite of *edit mode*. If the user has not clicked the Edit Mode handle bar (or is not eligible to click it) the page is said to be in view mode. No actions may be taken on the page while it is in view mode.

**View privileges**

Privilege level on a page that allows the user to view content on the page. All users may navigate through pages, select items for the Favorite Content area of the home page, and search for content.



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