



# BEA WebLogic Workshop™ Help

Version 8.1 SP4  
December 2004

# **Copyright**

Copyright © 2003 BEA Systems, Inc. All Rights Reserved.

## **Restricted Rights Legend**

This software and documentation is subject to and made available only pursuant to the terms of the BEA Systems License Agreement and may be used or copied only in accordance with the terms of that agreement. It is against the law to copy the software except as specifically allowed in the agreement. This document may not, in whole or in part, be copied, photocopied, reproduced, translated, or reduced to any electronic medium or machine readable form without prior consent, in writing, from BEA Systems, Inc.

Use, duplication or disclosure by the U.S. Government is subject to restrictions set forth in the BEA Systems License Agreement and in subparagraph (c)(1) of the Commercial Computer Software—Restricted Rights Clause at FAR 52.227–19; subparagraph (c)(1)(ii) of the Rights in Technical Data and Computer Software clause at DFARS 252.227–7013, subparagraph (d) of the Commercial Computer Software—Licensing clause at NASA FAR supplement 16–52.227–86; or their equivalent.

Information in this document is subject to change without notice and does not represent a commitment on the part of BEA Systems. THE SOFTWARE AND DOCUMENTATION ARE PROVIDED "AS IS" WITHOUT WARRANTY OF ANY KIND INCLUDING WITHOUT LIMITATION, ANY WARRANTY OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. FURTHER, BEA Systems DOES NOT WARRANT, GUARANTEE, OR MAKE ANY REPRESENTATIONS REGARDING THE USE, OR THE RESULTS OF THE USE, OF THE SOFTWARE OR WRITTEN MATERIAL IN TERMS OF CORRECTNESS, ACCURACY, RELIABILITY, OR OTHERWISE.

## **Trademarks or Service Marks**

BEA, Jolt, Tuxedo, and WebLogic are registered trademarks of BEA Systems, Inc. BEA Builder, BEA Campaign Manager for WebLogic, BEA eLink, BEA Liquid Data for WebLogic, BEA Manager, BEA WebLogic Commerce Server, BEA WebLogic Enterprise, BEA WebLogic Enterprise Platform, BEA WebLogic Enterprise Security, BEA WebLogic Express, BEA WebLogic Integration, BEA WebLogic Personalization Server, BEA WebLogic Platform, BEA WebLogic Portal, BEA WebLogic Server, BEA WebLogic Workshop and How Business Becomes E-Business are trademarks of BEA Systems, Inc.

All other trademarks are the property of their respective companies.

## Table of Contents

<b>Designer Interface Reference.....</b>	<b>1</b>
<b>Portal Designer.....</b>	<b>2</b>
<b>Property Set Designer.....</b>	<b>6</b>
<b>User Segment Designer.....</b>	<b>10</b>
<b>Content Selector Designer.....</b>	<b>13</b>
<b>Available Conditions Tab.....</b>	<b>15</b>
<b>Placeholder Designer.....</b>	<b>16</b>
<b>Discount Designer.....</b>	<b>19</b>
<b>Campaign Designer.....</b>	<b>23</b>

# Designer Interface Reference

The following designers can be invoked from the Portal Designer

- Property Set Designer (Use to edit Session, Request, Events, and Catalog Structure objects.)
- User Segment Designer
- Portal Placeholder Designer
- Discount Designer
- Campaign Designer
- Content Selector Designer

## Related Topics

To learn more about WebLogic Portal, the tools and services it provides, and surfacing your applications in a portal interface, see the following topics:

[WebLogic Portal Overview](#)

[Developing Portal Applications](#)

# Portal Designer

Use this window to assemble portlets and other elements into portals.

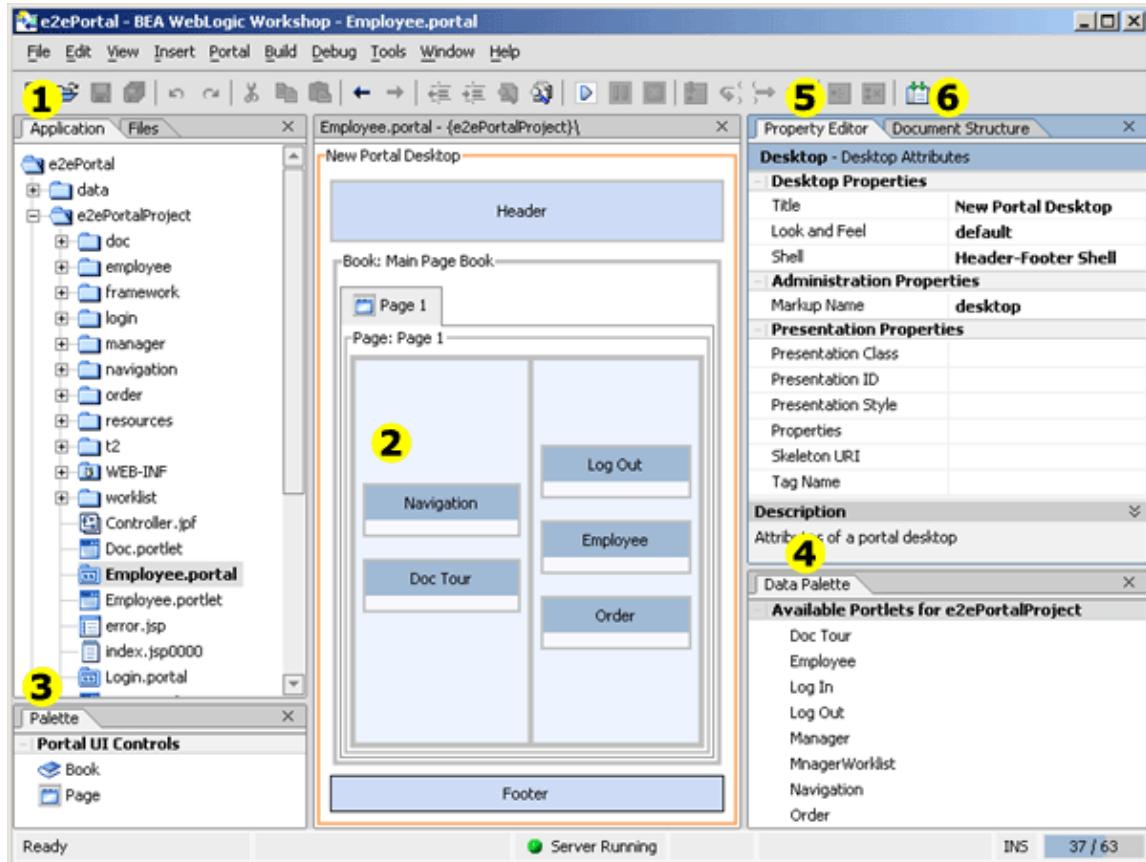


Table 2–1 Tools for Designing Portals

## *Callout #*

*Use this tool . . .*

*For these tasks . . .*

1

Application Window

Create, view, and edit portal files in your portal application projects. The names of portal files end in .portal.

2

Design View

Design your portal in this area.

3

Portal Designer

2

### Palette Window

Add books and pages to the portal by dragging components from the Palette window and dropping them onto the Design View canvas.

4

### Data Palette Window

Add portlets to the portal by dragging them from the Data Palette window and dropping them onto the Design View canvas. You can use the sample portlets provided by WebLogic Portal, or you can create your own, as described later in *Creating a Portlet*.

5

### Property Editor Window

Set properties for the currently selected portal component, such as the portal look and feel. You can select a portal component by clicking on it in the Design View canvas or by selecting its name in the Document Structure window (described below).

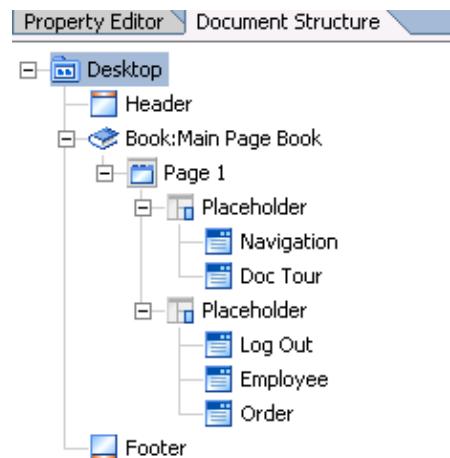
6

### Document Structure Window

View the hierarchical structure for the portal interface.

You can select a portal component in the Document Structure window by clicking on it. The portal component is selected in Design View and you can edit its properties in the Property Editor window.

The Document Structure window for a portal reveals the elements that comprise a portal:



As shown in the Document Structure window, the following components make up the hierarchical structure of the sample Employee portal interface:

- ◆ Desktop User view of portal components that includes the portal header, footer, and body.

## Designer Interface Reference

- ◆ Header and Footer Areas above and below the main body that typically include personalized content, banner graphics, legal notices, and related links.
- ◆ Book High-level organizational framework and navigation tool for the content; provides a mechanism for nesting pages and other content.
- ◆ Page Organized collection of portlets and books whose position is determined by a layout.
- ◆ Layout Determines the position of the portlets and books on a page using placeholders within a grid.
- ◆ Placeholders Individual cells in the layout used to organize the portlets on a page.
- ◆ Portlets Windows in which you present your applications, information, and business processes. Portlets are described in more detail in the next section.
- ◆ Portal Rendering and Look and Feel Components (not shown in the previous figure) Stylistic aspects of the desktop appearance. This topic is described in more detail later, in Creating Look and Feels.

## Actions in the Portal Designer

The following actions are available using the Portal Designer:

- Assemble portal elements into a portal, and to add programmatic functionality to portlets.
- Create, Edit, Delete, Save portal elements such as Books, Pages and Portlets.
- Within the Design View, right-click on a placeholder to insert or remove portlets, rearrange portlets and view a simple mock-up of the portal you're designing.
- The Application Palette exposes the construction of the Web application that contains your portal(s), and all the JSPs and other elements used to customize and add functionality. This includes Java Pageflows used to apply complex navigation to portlets.
- The PortalUI Controls include Books, Pages and Portlets you can drag onto a placeholder.
- Preview dynamic content using the Content Preview palette.
- View build results and debugger messages.
- Use the Property Set Designer to set properties on any selected portal element.
- Use the Document Structure palette to determine the hierarchical location of files within the portal desktop being edited.
- Use the Content Preview palette to review the results of content queries against the current document repository.
- The Data Palette exposes the list of currently available portlets that can be inserted into the current portal in design view.

## Designers in the Portal Designer

The following designers can be invoked from the Portal Designer

- Property Set Designer (Use to edit Session Requests, Events, Catalog Structure objects.)
- User Segment Designer
- Portal Placeholder Designer
- Campaign Designer
- Discount Designer
- Content Selector Designer

### Related Topics

## Designer Interface Reference

To learn more about WebLogic Portal, the tools and services it provides, and surfacing your applications in a portal interface, see the following topics:

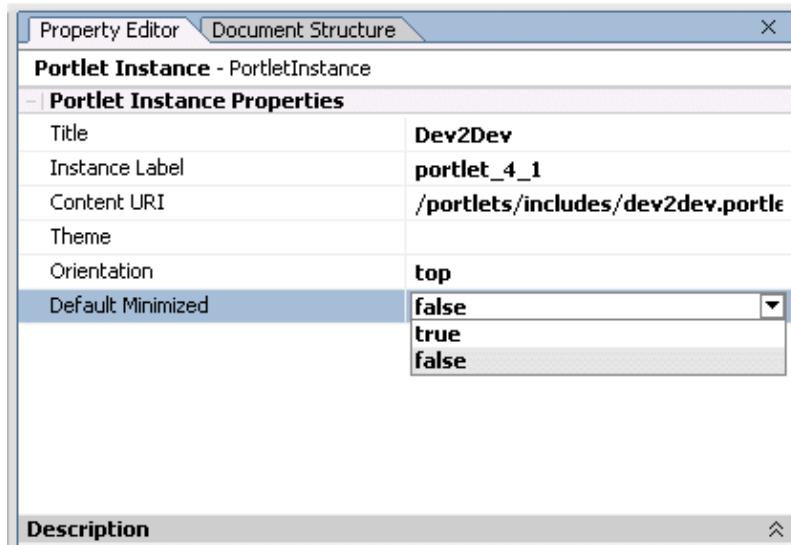
[Portal Overview](#)

[Developing Portal Applications](#)

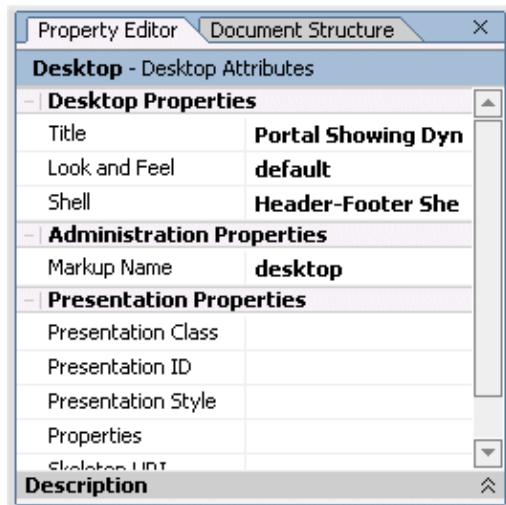
# Property Set Designer

Use the Property Set Designer to edit Session, Request, Events, and Catalog Structure objects.

The Property Set designer exposes the properties available for each object selected in WebLogic Workshop. For example, when a portlet is selected, the properties for that instance become visible and can be easily edited.



And when a desktop is selected, its properties are automatically made visible in the designer.



## Understanding Property Sets

A property set is a file in which you create properties (name–value pairs). A property set's filename serves as a namespace, letting you create properties with the same name in different files. Each type serves a different purpose, but each is defined the same way. The properties you define provide information that lets you:

- Target users with personalized content, e-mails, or discounts
- Dynamically assign access to specific portal content and resources

## Designer Interface Reference

- Dynamically assign delegated administration rights to administrators

**User Profile** – The User Profile designer lets you create groups of properties (fields) for entering personal information about users. For example, you could create a property set called "human resources" that contains properties such as "gender," "hire date," and "social security number."

**Session** – The Session Property Set designer lets you create properties to capture and use specific HTTP session information.

**Request** – The Request Property Set designer lets you create properties to capture and use specific types HTTP requests.

**Event** – The Event Property Set designer lets you register a custom event you have developed. When you register an event by creating a property set for it, that event can be used to trigger personalization and track user behavior in your Portals.

**Catalog Structure** – The Catalog Structure Property Set designer lets you create fields for labeling the items in your catalog, such as "SKU," "Description," and "Price."

Following are the key elements of the Property Set designer window.

## Palette Window

The Palette window allows you to create properties. Drag the type of property you want to create into the property designer. Following are descriptions of the types of properties you can create:

<b>Single Unrestricted</b>	A single unrestricted property can have only one value, but you can enter any value; for example, "Last Name" or "Age" properties.
<b>Single Restricted</b>	A single restricted property can have only one value, and you are restricted to selecting that value from predefined list; for example, a "Browser" property with possible values of "Internet Explorer," "Netscape," "Opera," or "Mozilla."
<b>Multiple Unrestricted</b>	A multiple unrestricted property can have multiple values, and you can enter any values; for example, an "E-mail" property where users can enter one or more e-mail addresses.
<b>Multiple Restricted</b>	A multiple restricted property can have multiple values, and you are restricted to selecting any or all values from a predefined list. For example, a "Forms" property from which users can select documents, such as "1040EZ," "1040A," and "1040."

You can change a property's type after you drag it into the designer. For example, you can turn a single unrestricted property to a multiple restricted property by modifying its values in the Property designer window.

## Property Designer Window

The Property designer window is where you set the names, descriptions, and values of the property set or property selected in the Document Structure window.

### Property Sets

When you select the name of the property set in the Document Structure window, the following fields appear in the Property designer window:

<b>Name</b>	The name of the property set is displayed. The name shown is the filename without the file extension. You cannot edit this field.
<b>Type</b>	The type of property set or the type of file you are working with. You cannot edit this field.
<b>Description</b>	Click the ellipsis icon [...] next to this field to enter a description for the property set.

### Properties

When a property is selected (either in the designer or in the Document Structure window), the following fields appear in the Property designer window:

<b>Property Name</b>	Enter the official name for the property.
<b>Description</b>	Click the ellipsis icon [...] next to this field to enter a description for the property.
<b>Data Type</b>	Select the type of value the property will contain: Text, Numeric, Float (decimal), Boolean (true/false), or Date/Time. Your selection determines the dialog box you see when you edit the Values field.
	Properties with a Boolean data type are automatically set to "single restricted." Any change to Data Type removes anything previously entered in the Values field, because the types of values change.
<b>Selection Mode</b>	This field will already be populated, based on the type of property you dragged from the Palette window; but you can switch back and forth between Single and Multiple. Any change to Selection Mode removes anything previously entered in the Values field, because the number of allowed values changes.
<b>Value Range</b>	This field will already be populated, based on the type of property you dragged from the Palette window; but you can switch back and forth between Restricted and Unrestricted. Any change to Value Range removes anything previously entered in the Values field, because the types of allowed values change.
<b>Values</b>	Click the ellipsis icon [...] next to this field. A different dialog box appears depending on your settings in the Data Type, Selection Mode, and Value Range fields. Set the appropriate values and

default values.

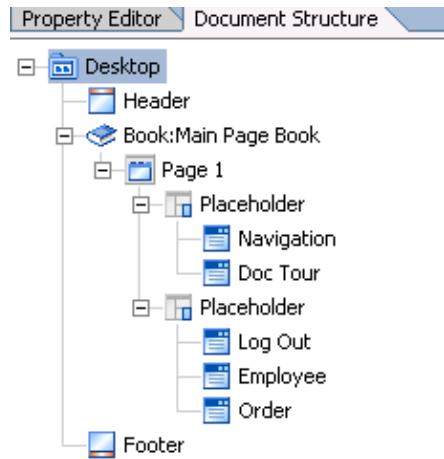
Any values you enter in this field will be removed if you change the Data Type, Selection Mode, or Value Range.

As you modify the values in the Property designer window, the values are updated in the designer window.

## Document Structure Window

The Document Structure window provides a hierarchical view of the property set and the names of the properties you create. Select the property set name or a property name to edit its characteristics in the Property designer window.

For example, when a portal is selected in WebLogic Workshop, the Document Structure window reveals the elements that comprise a portal:



### Related Topics

[Creating User Profile Properties](#)

[Creating Session Properties](#)

[Creating Request Properties](#)

[Registering a Custom Event](#)

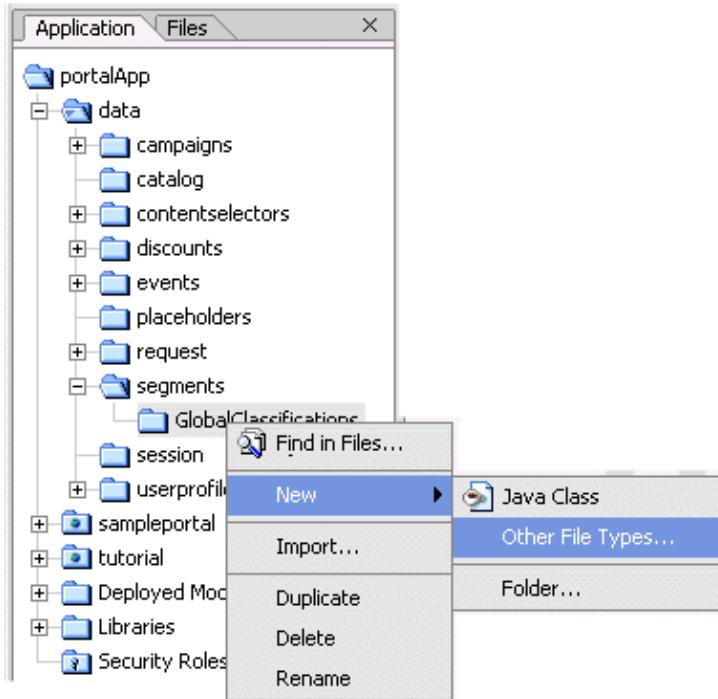
[Creating Catalog Structure Properties](#)

# User Segment Designer

Use this designer to create or modify user segments, which are used to perform dynamic personalization based on pre-defined rules.

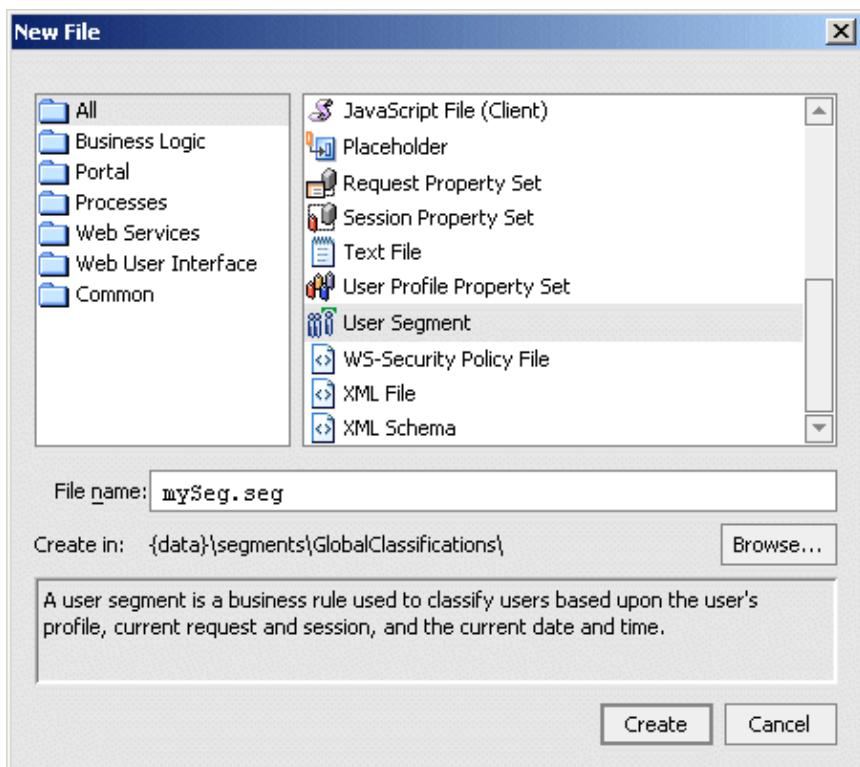
## Creating a User Segment

1. Create a new user segment by right-clicking on the *segments* folder inside the *data* directory for your application and selecting *File->New->Other File Types*.

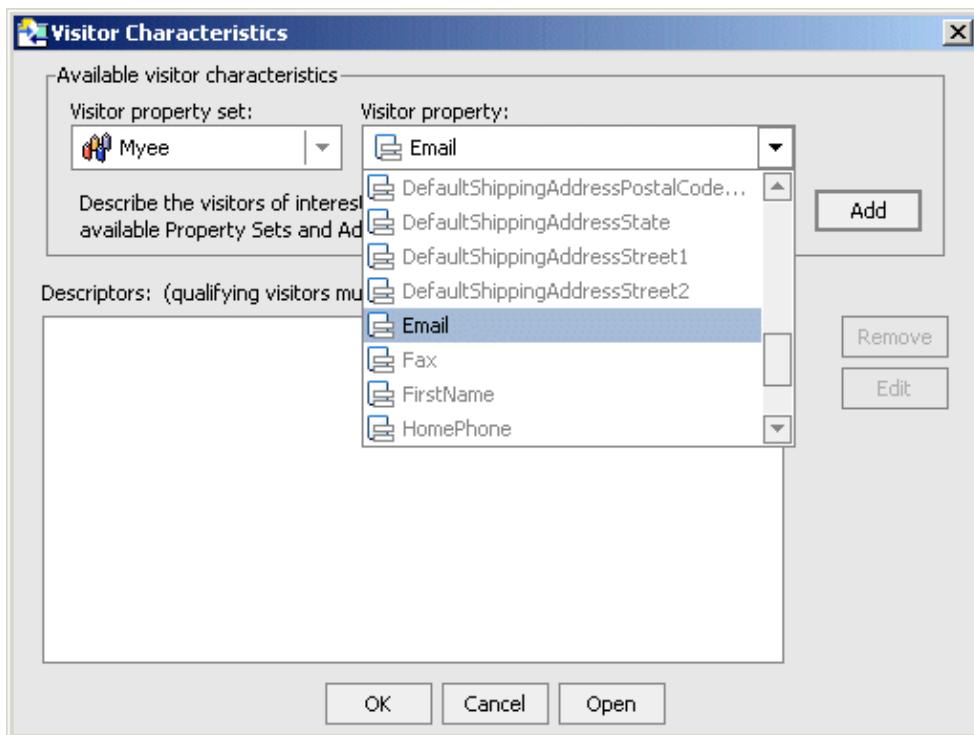


2. Name the user segment and click *Create*.

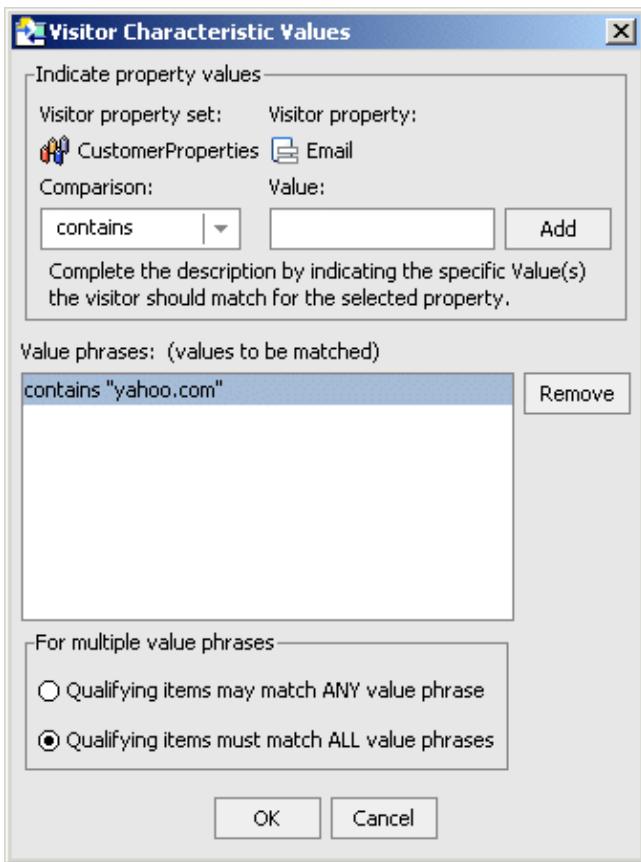
## Designer Interface Reference



3. When the user segment designer appears, add visitor properties by right-clicking inside the designer. Alternately, drag properties into the designer from the palette.



4. Activate conditions from the list of available conditions below the user segment designer.



5. After setting conditions, characteristics and customer properties, save the user segment.

## Available Conditions Tab

The Available Conditions tab allows any combination of conditions to be exposed in the Segment Design View. Select a condition by clicking on the checkbox next to the item.

The following conditions can be set to dynamically evaluate a visitor's inclusion in a user segment:

- Visitor Characteristics (based on User Profile Property Set)
- Visitor's HTTP session properties (based on Session Property Set)
- Visitor's HTTP request properties (based on Request Property Set)
- Various Date Parameters

## Related Topics

[Creating User Segments](#)

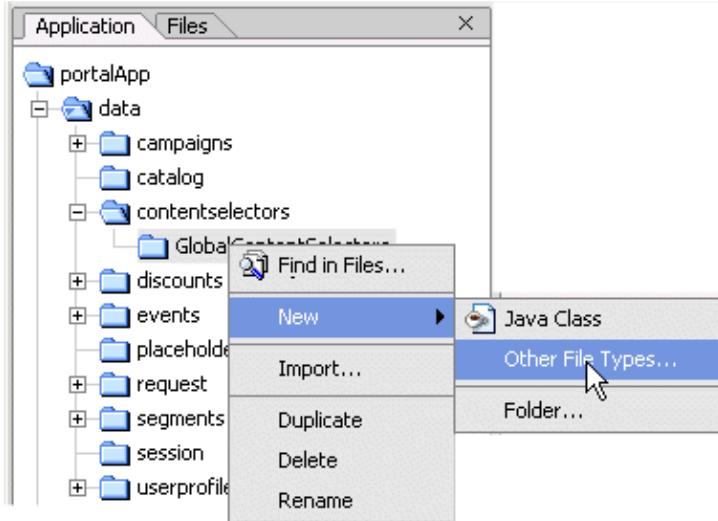
[Using the Property Set Designer](#)

# Content Selector Designer

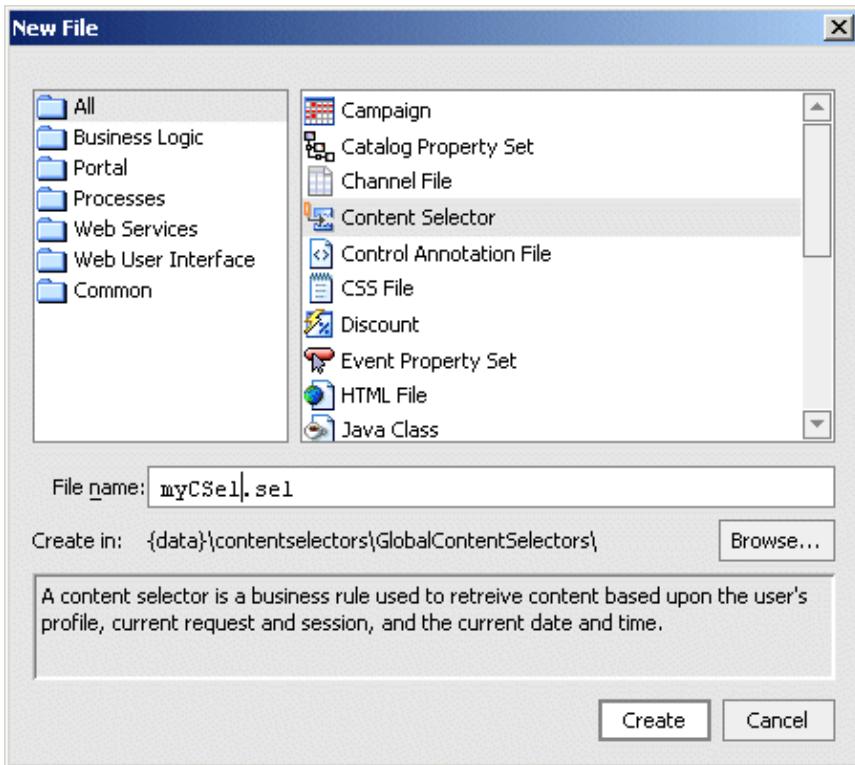
Use this designer to create or edit content selectors, which are used to define rules for retrieving content.

## Creating a Content Selector

1. Create a new content selector by right-clicking on the **content selectors** folder inside the **data** directory for your application and selecting **File->New->Other File Types**.

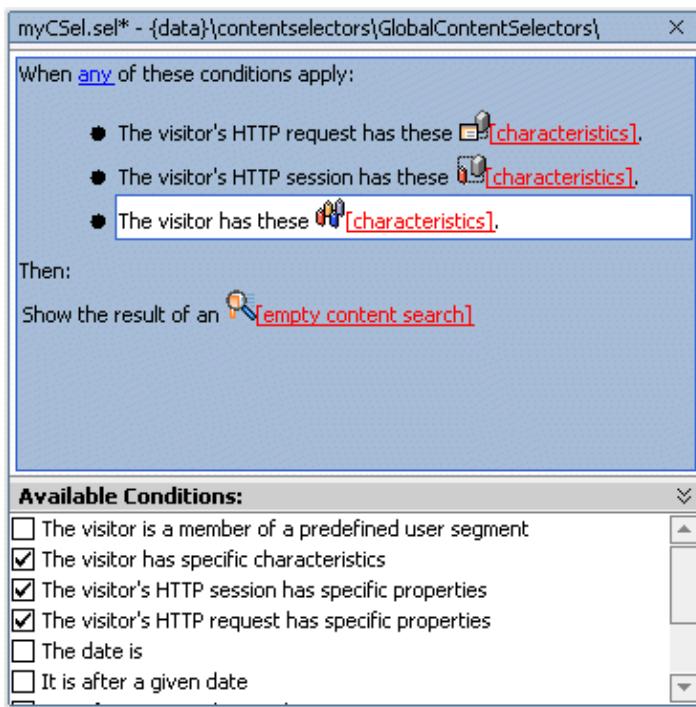


2. Name the content selector and click **Create**.



## Designer Interface Reference

- When the content selector designer appears, add conditions by right-clicking inside the designer. Alternately, drag conditions into the designer from the palette.



- Activate conditions from the list of available conditions below the content selector designer.
- After setting conditions, characteristics and content searches, save the content selector.

# Available Conditions Tab

The Available Conditions tab allows any combination of conditions to be exposed in the Selector Design View. Select a condition by clicking on the checkbox next to the item.

The following conditions can be set to dynamically trigger a certain content query:

- Visitor Characteristics (based on User Segment, User Profile Property Set)
- Visitor's HTTP session properties (based on Session Property Set)
- Visitor's HTTP request properties (based on Request Property Set)
- Various Date Parameters

## Related Topics

[Creating Content Selectors](#)

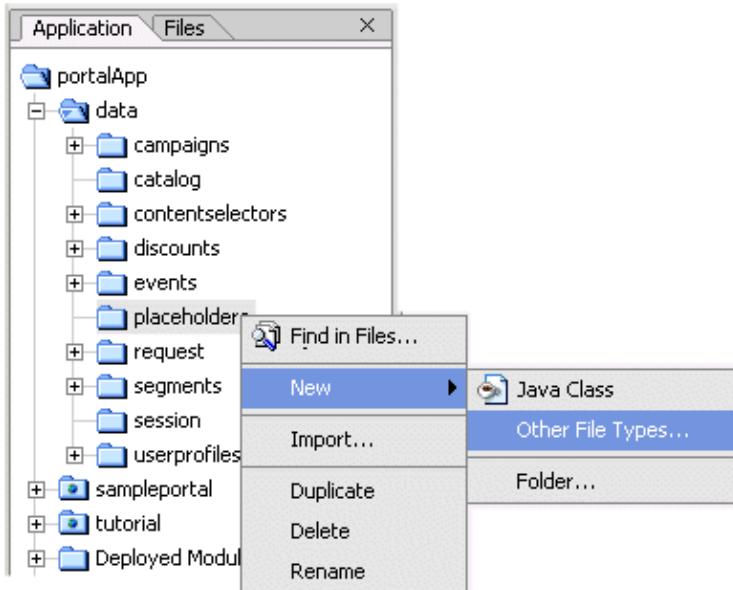
[Using the Property Set Designer](#)

# Placeholder Designer

Use this designer to create or modify placeholders, which are used to target the results of a content search. Placeholders generate the HTML that displays ad content at the location of the placeholder tag.

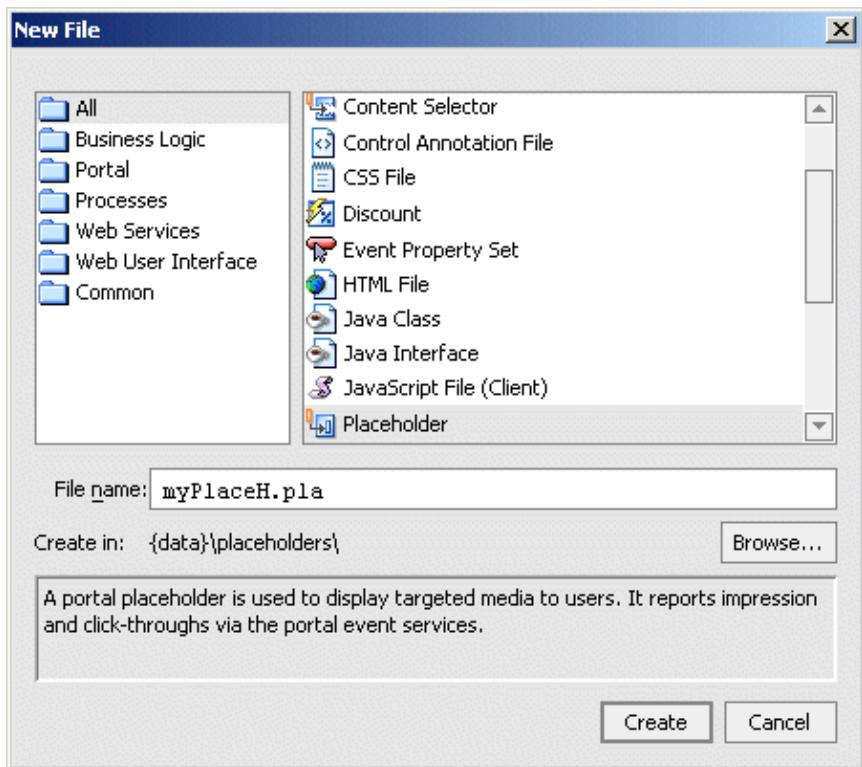
## Creating a Placeholder

1. Create a new placeholder by right-clicking on the *placeholders* folder inside the *data* directory for your application and selecting *File->New->Other File Types*.

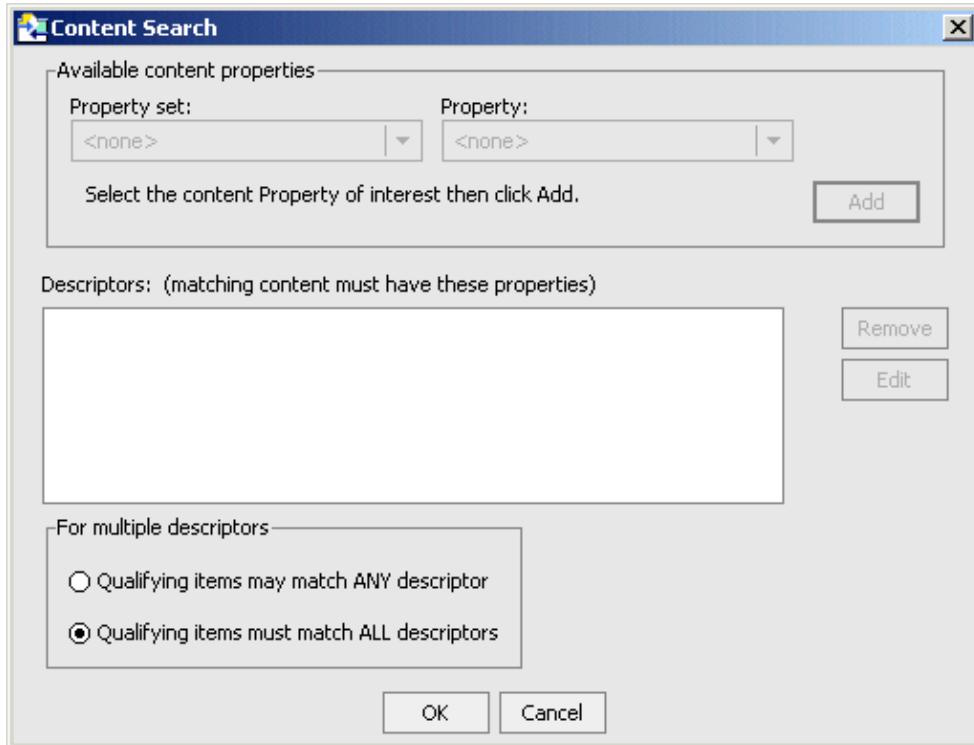


2. Name the placeholder and click *Create*.

## Designer Interface Reference



3. When the placeholder designer appears, add content search properties by right-clicking inside the designer. Alternately, drag content search properties into the designer from the palette.



4. After setting content search properties, save the placeholder.

## Ad Search

Each Content query within the Placeholder is labeled as an Ad Search. To edit this object, take the following steps:

- Click on the highlighted words "*empty content search*" inside the empty Ad Search window.
- Select the property set and property from the list of available Ad properties and click **Add**.
- Descriptors can be removed or edited in this view.
- If you're using multiple descriptors, click on the ALL or ANY radio button to determine if qualifying items must match ANY descriptor, or ALL descriptor.
- Click **OK** to save this new Ad Search.

### Related Topics

[Creating Placeholders](#)

[Creating Campaigns](#)

[Using the Property Set Designer](#)

# Discount Designer

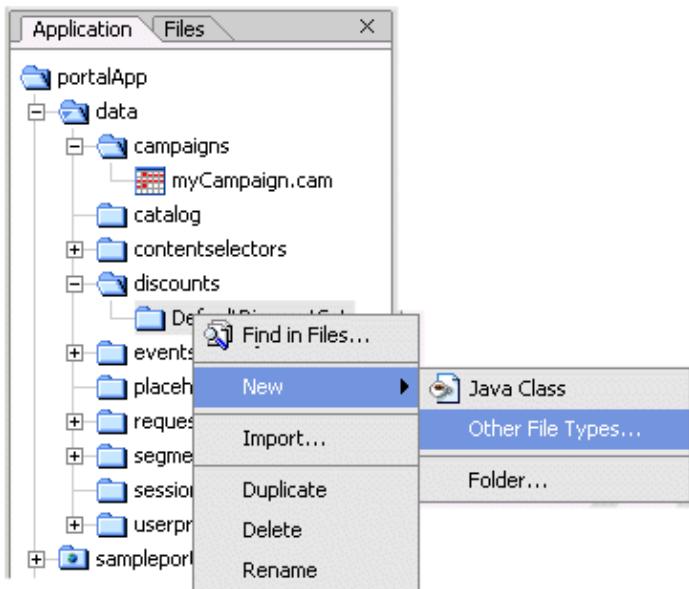
Use this designer to create or modify discounts used in campaigns.

## Creating Discounts

Create discounts using the Wizard or the Discount designer.

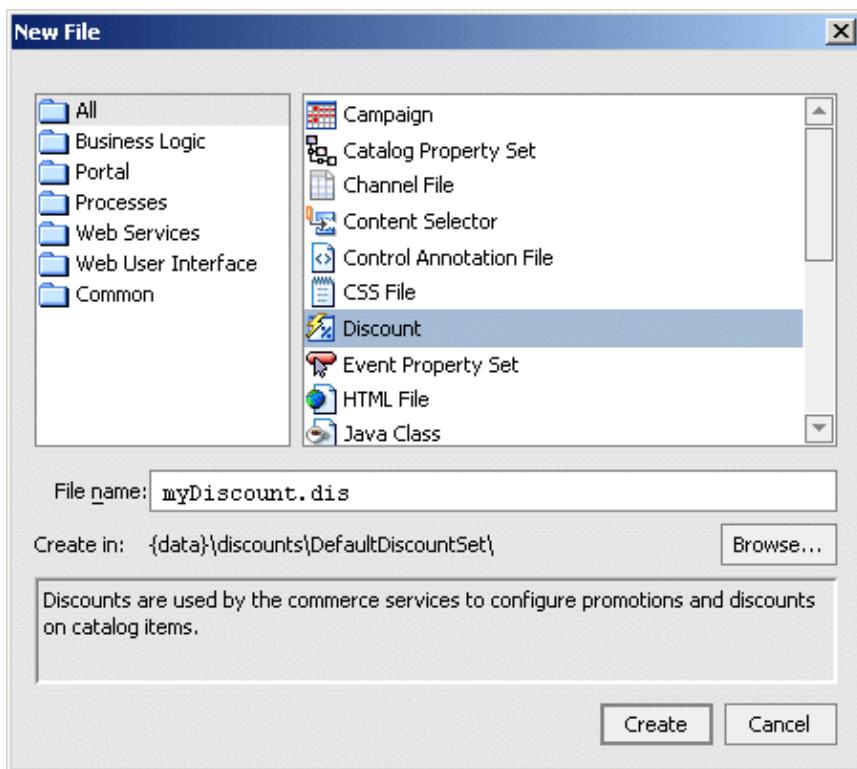
### Using the Discount Wizard

1. Create a new discount by right-clicking on the *campaigns* folder inside the *data* directory for your application and selecting *File->New->Other File Types*.



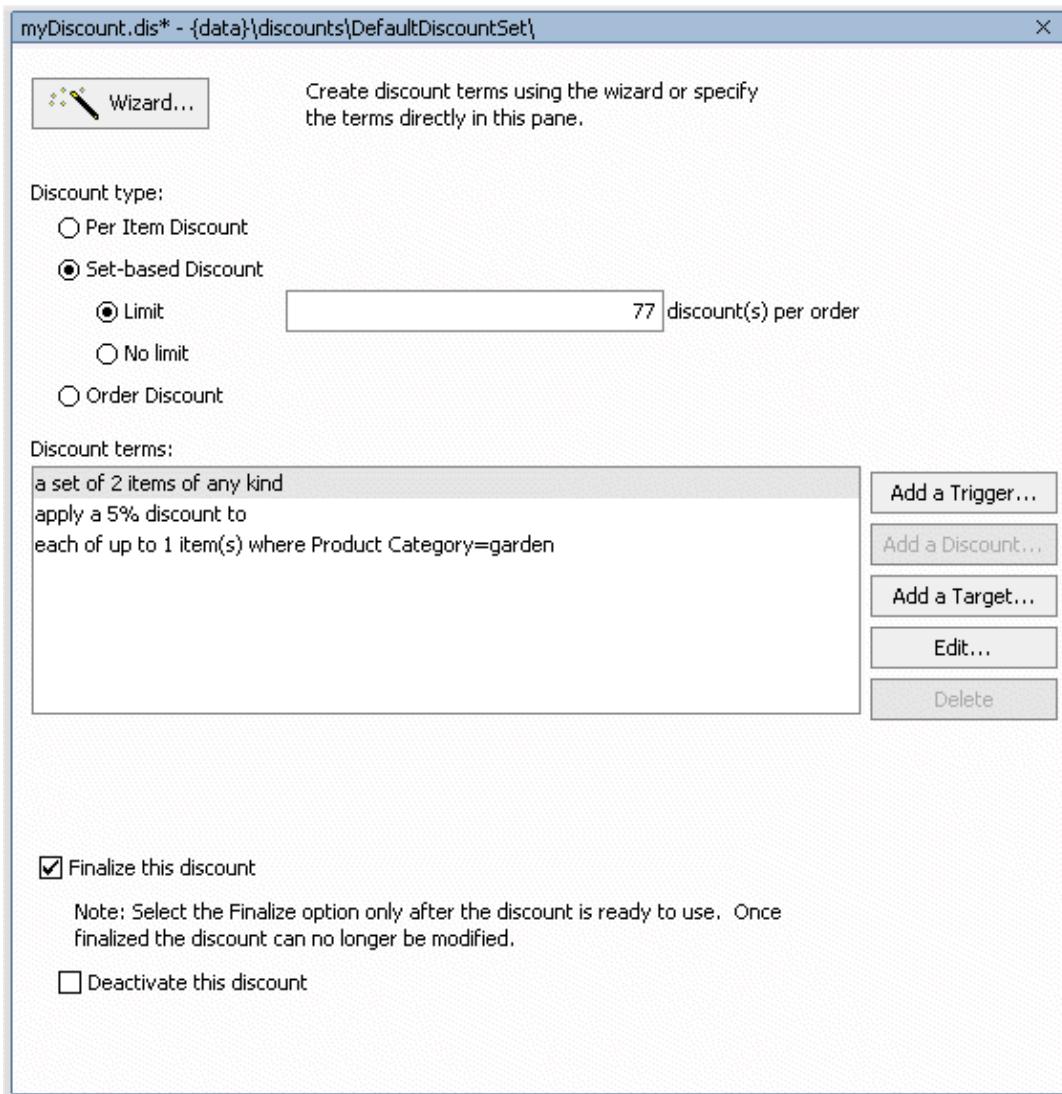
2. Name the discount and click *Create*.

## Designer Interface Reference



3. When the new discount appears click on the Wizard icon, and follow the instructions.

## Designer Interface Reference



4. When the wizard is completed, save the discount. The discount may now be added to a campaign using the campaign designer.
5. Before the discount can be used, it must be finalized.

## Using the Discount Designer

1. Create a new discount by selecting **File->New->Discount**.
2. Name the discount and click **Create**.
3. For Discount Type, and select Per Item, Set-Based or Order Discount.
4. To select Discount Terms, select one of the three:
5. Double-click on the phrase "For each matching set of TRIGGER items"
6. Set quantity
7. Set Trigger Items to Any, or Specific Items.
8. Browse the Catalog, select a SKU from the catalog or add one.
9. Click OK.
10. Double-click on the words "Apply a Discount"
11. Set the discount to Percentage, Amount or Fixed Price.
12. Click OK.

## Related Topics

[Creating Campaigns](#)

[Using Campaigns in a Portlet](#)

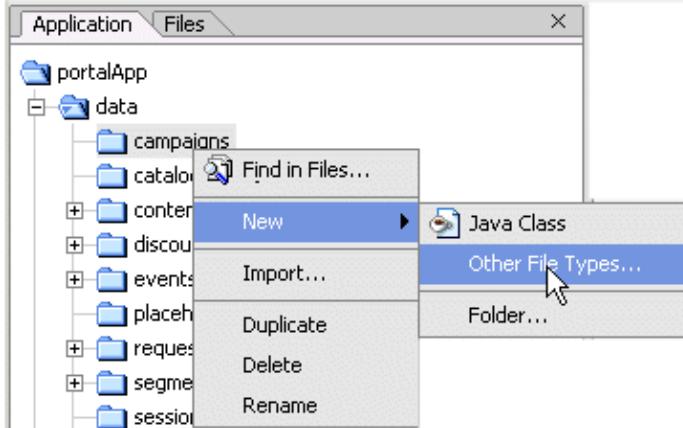
[Using the Property Set Designer](#)

# Campaign Designer

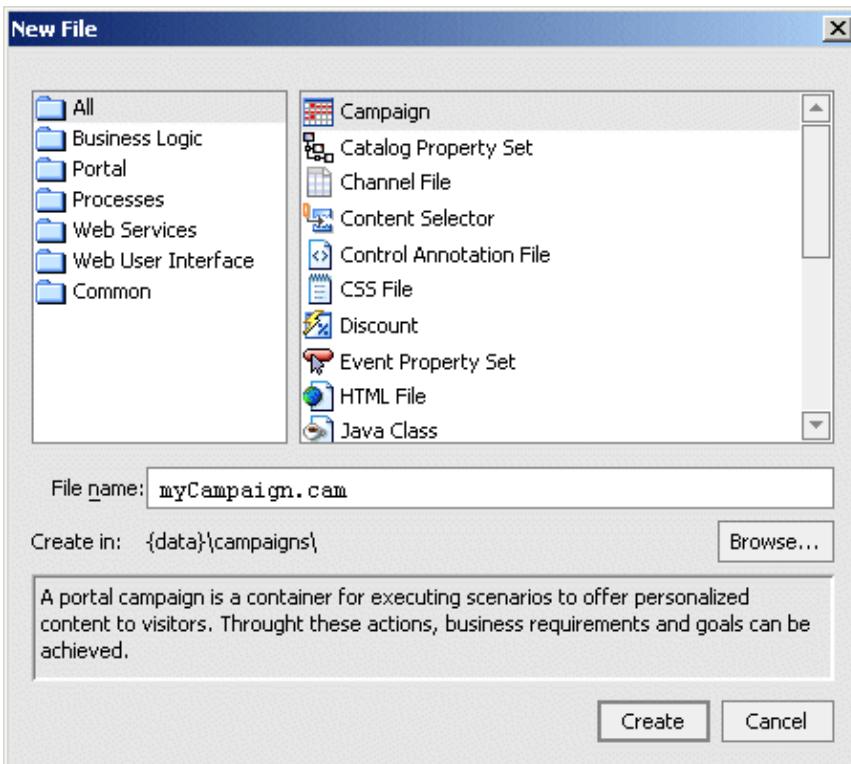
Use this designer to create or modify campaigns.

## Creating Campaigns

1. Create a new discount by right-clicking on the ***campaigns*** folder inside the ***data*** directory for your application and selecting ***File->New->Other File Types***.

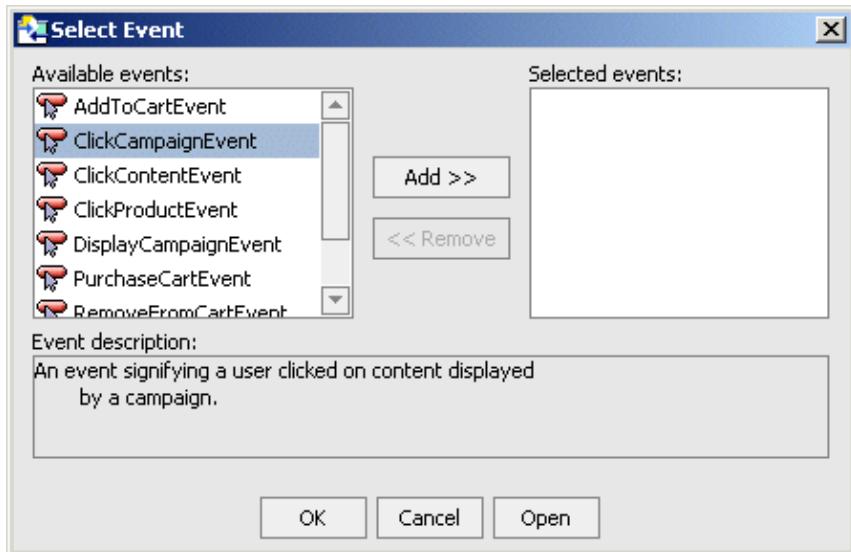


2. Name the campaign and click ***Create***.

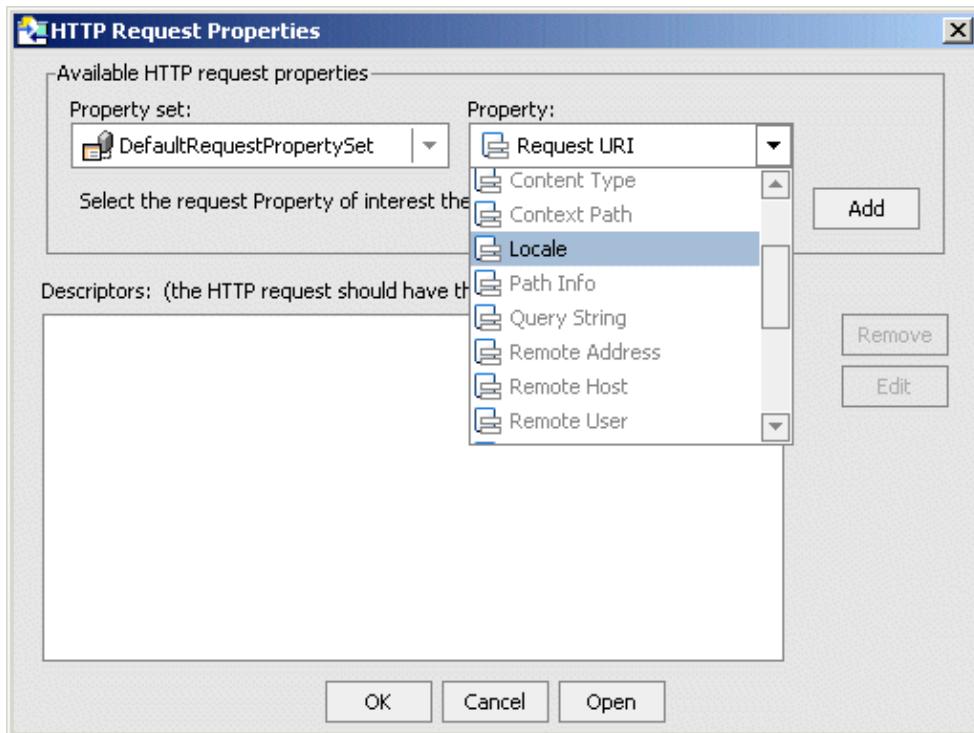


3. When the campaign designer appears, add scenarios and events by right-clicking inside the campaign. Alternately, drag scenarios and events from the palette.
4. Use the Event selector to add events to a scenario.

## Designer Interface Reference



5. To set properties on an Http request, click on the highlighted word Characteristics.



The following Scenario Types can be used in Campaigns:

- Email Pilot Test
- Online Content Test
- Registration Confirmation Email
- Discount and Content

The following Scenario Rule Actions can be added to Scenarios:

## Designer Interface Reference

- Content Rule
- Email Rule
- Discount Rule

### Related Topics

[Creating Campaigns](#)

[Using Campaigns in a Portlet](#)

[Using the Property Set Designer](#)