Oracle® Portal

Tutorial

Release 3.0.8

January, 2001
Part No.  A87567-01

ORACLE®
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Send Us Your Comments

Oracle Portal Tutorial, Release 3.0.8
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Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. 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?
- Are the examples correct? Do you need more examples?
- What features did you like most?

If you find any errors or have any other suggestions for improvement, then indicate the document title and part number, and the chapter, section, and page number (if available). You can send comments to us in the following ways:

   Electronic mail: webdbdoc_us@oracle.com

If you have problems with the software, then contact your local Oracle Support Services.
Welcome to the Oracle Portal Tutorial!

Welcome to the Oracle Portal tutorial! This manual will help get you started with Oracle Portal Release 3.0.

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**Intended Audience**

This manual is intended primarily for new users of Oracle Portal, to introduce them to the product and its functionality. Existing users who want to learn more about Oracle Portal’s new features may also find this manual useful.

After reading this preface, you should read Chapter 1, "Learning the Basics" for an introduction on how to use Oracle Portal. To complete the tutorial, you need to read only those chapters that relate to your particular job function. To find out which chapters you should read, see "Structure" on page xi.

If you are already comfortable using Oracle Portal and want more advanced examples, see the Oracle Portal 3.0.8 Building Portals manual.
Prerequisites

The exercises within the tutorial make use of a demo schema, content area, and application. These demos are available on http://technet.oracle.com/docs/products/iportal/doc_index.htm. Contact your portal administrator, or refer to Section A.1, "Installing the Demo Schema, Content Area, and Application" on page A-1 for more information.

You must have a Web browser installed on your machine. The minimum and recommended requirements are:

- Microsoft Internet Explorer 4.0.1 (Service Pack 1) or 5.01
- Netscape Communicator 4.0.8 or 4.72

You should be familiar with using your Web browser. For example, you should know how to start your Web browser and be familiar with the basic user interface elements, such as hypertext links.

You must set up or obtain the following information from your portal administrator:

- A user name and password to log on to Oracle Portal.
- The URL of the Oracle Portal home page.

In addition, to complete Chapter 5, "Building Application Components", you should have a basic understanding of PL/SQL and database concepts.

Tutorial Scenario

During this tutorial, you are an employee of Healthy Living Wholesalers, a company that provides health and fitness products.

Healthy Living wants to have an Intranet portal to provide its employees with quick access to the content and applications that they use the most. They also want a single repository for all the information about the company, its products, and other information required by both employees and customers. The Healthy Living Human Resources department also wants an application that enables HR staff to query and update information about the company’s employees. In the tutorial you will assume several roles within the Healthy Living company in order to fulfill these requirements.
You do not need to complete all the exercises in the tutorial. The following table lists the chapters included in the tutorial and indicates what type of user should complete the exercises in that chapter. Only complete those chapters and exercises that relate to your actual role within your own company.

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<td>Chapter 2, &quot;Designing a Portal&quot;</td>
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<td>Responsible for building your company’s portals (a portal administrator)</td>
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<td>Chapter 3, &quot;Maintaining a Content Area&quot;</td>
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<td>Responsible for maintaining a content area or a folder within a content area (a content area administrator or folder owner)</td>
</tr>
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<td>Chapter 4, &quot;Adding Items to a Content Area&quot;</td>
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<td>Responsible for adding content to a content area (a content contributor)</td>
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<td>Chapter 5, &quot;Building Application Components&quot;</td>
<td>Lessons on how to build applications.</td>
<td>Responsible for building your company’s applications (a portal developer)</td>
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<td>Appendix A, &quot;Setting Up the Tutorial&quot;</td>
<td>Instructions on how to set up this tutorial.</td>
<td>Responsible for setting up users for the tutorial</td>
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**Related Documents**

For more information, see the following manuals:

- *Oracle Portal 3.0.8 Configuration Guide*
- *Oracle Portal 3.0.8 Building Portals*

The *Oracle Portal Quick Tour* (available in the online help system or at http://technet.oracle.com/products/iportal/index.htm) provides an overview of the product.
The Oracle Technology Network (http://technet.oracle.com/products/iportal/index.htm) also provides many additional articles and white papers.

Conventions

The following conventions are used in this manual:

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>bold text</strong></td>
<td>Bold text indicates a term defined in the text, the glossary, or in both locations.</td>
</tr>
<tr>
<td></td>
<td>Bold text also indicates button names, labels, links, and other user interface elements.</td>
</tr>
<tr>
<td>monospace text</td>
<td>Monospace text indicates text that you need to enter.</td>
</tr>
<tr>
<td><em>italic text</em></td>
<td>Italic text is used for emphasis, and to indicate a cross-reference to another manual.</td>
</tr>
<tr>
<td>&lt;&gt;</td>
<td>Angle brackets enclose user-supplied names. Substitute an appropriate value.</td>
</tr>
</tbody>
</table>
Learning the Basics

Estimated completion time: 25 minutes

This chapter introduces the basic concepts and navigational principles of Oracle Portal. You’ll learn what Oracle Portal is, how to start Oracle Portal and log on, how to get around once you’ve logged on, and how to get help if you’re not sure how to complete a particular task.

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</tr>
<tr>
<td>Section 1.5, &quot;Using the Navigator&quot;</td>
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</tr>
<tr>
<td>Section 1.6, &quot;Logging off and Exiting Oracle Portal&quot;</td>
<td>Page 1-11</td>
</tr>
<tr>
<td>Section 1.7, &quot;Lesson Summary&quot;</td>
<td>Page 1-11</td>
</tr>
</tbody>
</table>

1.1 What Is Oracle Portal?

A portal is a Web-based application that enables your users to access content areas, external Web sites, other applications, newsfeeds, and other useful information. The term portal implies many other capabilities as well, but central to the definition is the ability to support personalized views, so that each user or user group can tailor both the content and the appearance of the portal to suit individual preferences and requirements.
Using Oracle Portal, you define the user experience by creating and administering dynamically-generated Web pages made up of informational portlets. **Portlets** provide access to Web-based resources: any Web page, application, business intelligence report, syndicated content feed, or other resource can be accessed through a portlet, allowing it to be personalized and managed as a service of Oracle Portal. Page definition and personalization features allow you to create and manage general purpose and community-specific pages, yet maintain a standardized corporate look and feel. Group and individual privileges can be extended to allow users to personalize the page to create unique views.

Oracle Portal incorporates a set of self-service tools that enables you to directly manage information within a portal repository and publish to the user community at large. **Content areas** make it easy for you and your users to upload, organize, and manage business documents and other file type content; no technical expertise or knowledge of HTML is required. **Components** enable you to quickly and easily build a variety of application components (Web forms, charts, reports, etc.) that display and interact with data managed in an Oracle database. When complete, both content areas and components are easily published to users as portlets.


### 1.2 Starting and Logging on to Oracle Portal

Oracle Portal is completely Web-based, therefore starting Oracle Portal is simply a matter of pointing your Web browser to the Oracle Portal home page.

1. Start your Web browser.
   
   If you are not sure whether Oracle Portal supports your browser, refer to "Prerequisites" on page x.

2. In the Address or Location field of your browser, enter the URL of the Oracle Portal home page and press the Enter or Return key.

   **Note:** If you do not know the URL of the Oracle Portal home page, ask your portal administrator.

   The Welcome to Oracle Portal page displays.

   **Tip:** It is a good idea to bookmark this page as a favorite so that you do not have to type the URL each time you want to access it. If you do not know how to do this, see your Web browser documentation.
You may notice that this page offers you access to information about Oracle Portal, but not to any of the Oracle Portal tools. This is because, at the moment, you are a public user because you have not identified yourself and Oracle Portal cannot determine what you are entitled to access. To access the Oracle Portal tools, you must log on and identify yourself as an authorized user.

3. Click Login in the top right of the Welcome page.

4. Enter your User Name and Password.
   
   **Note:** If you are not sure of your user name or password, contact your portal administrator.

   **Single Sign-On**
   
Enter your Single Sign-On user name and password to login.

<table>
<thead>
<tr>
<th>User Name</th>
<th>Password</th>
</tr>
</thead>
</table>

5. Click Login.

   Your personalized Oracle Portal home page displays. If you receive an error message, check that you entered your login information correctly, or check with your portal administrator.
Don’t worry if your Oracle Portal home page does not look exactly like the one shown above. The appearance of the home page varies depending on your privileges and how it has been customized.

Note: The figure shown above assumes that your default home page is the Oracle Portal home page. If you have a different default home page, you can navigate to the Oracle Portal Home Page, under Top-Level Pages, using the Navigator. For information about using the Navigator, see Section 1.5, "Using the Navigator" on page 1-10.

### 1.3 Getting to Know Your Oracle Portal Home Page

The Oracle Portal home page is itself a portal into the portal building environment. Take a moment to familiarize yourself with the home page and the features it provides.

The home page is divided into separate tabs that group related features together. The tabs available to you on the home page depend on your privileges, so you may not see all of the following tabs. Click the link to display the tab.
Getting to Know Your Oracle Portal Home Page

The Build tab contains tools for building pages, content areas, and applications.

The Administer tab contains tools for administering Oracle Portal, such as creating users and groups, and setting global properties. Only database and portal administrators can access this tab.

The Administer Database tab contains tools for administering the database, including creating schemas, granting database privileges, and monitoring database performance. Only database administrators can access this tab.

The Monitor tab contains tools for monitoring pages, content areas, and applications.

Portlets
Each tab of the home page is made up of portlets that provide access to Oracle Portal tools. For example, the Content Areas portlet on the Build tab provides access to the content area building tools.

The portlets that you can see depend on your privileges. For example, you will be able to see the Applications portlet only if you have privileges to build applications.
You can customize some portlets to change the way they display on the home page. For example, you can add new favorite links, or specify how many of your favorite links to display, by customizing the Favorites portlet.

**Shortcut bar**
The shortcut bar at the top right of the page enables you to quickly get to:

- The Navigator, which provides access to all Oracle Portal objects. For information about how to use the Navigator, see "Using the Navigator" on page 1-10.
- The Oracle Portal home page.
- The Oracle Portal online help system. For information about how to use the help system, see "Getting Help" on page 1-6.

### 1.4 Getting Help
Oracle Portal provides two ways of getting help:

- The online help system, which provides detailed step-by-step instructions and reference information, as well as an introduction to Oracle Portal and troubleshooting information. You can access the online help system by clicking $\text{?}$ in the shortcut bar at the top of any page.
- Field-level help, which provides specific information about the fields on the current page. You can access field-level help by clicking $\text{?}$ in the page.

#### 1.4.1 Using the online help system
The following exercise introduces you to the online help system and demonstrates the different ways of finding information within it.

1. In the shortcut bar at the top of the page, click $\text{?}$ to display the online help system in a new browser window.
2. In the navigation bar on the left, click Task Help.
3. Click The Basics.
4. Click What is Oracle Portal?
   A conceptual topic displays in a new browser window. This topic provides information about Oracle Portal.
5. Scroll down to the end of the topic.
   Most topics include a Related topics section, which contains links to other topics that might interest you.
6. Click What is a page?
7. Here is another conceptual topic. In the Related topics section, click Creating a page.
   This is a task topic that describes all the steps involved in creating a page.
8. Close the window containing the help topic.

1.4.1.1 Using the index
But what if you don’t know which folder a topic is in? You can find it using the index.

1. In the navigation bar, click Index.
2. Click p.
3. Scroll down until you see pages, and click definition.
   This takes you to the same What is a page? topic you saw earlier.
4. Click your browser’s Back button three times to return to a page containing the help system’s navigation bar.

1.4.1.2 Using the search feature
Alternatively, you can use the search feature.

1. In the navigation bar Search field, enter page and click Go.

   ![Search field](image)

   The search results include all the topics whose display name, description, or keywords include the word page, including the What is a page? topic.

   Note: If interMedia Text is installed and enabled, and an interMedia Text index has been created, the content of the topics is also searched.

2. Click to return to the help system’s home page.

1.4.1.3 Using categories and perspectives
Every topic in the help system is categorized according to what type of information it contains. The help system also uses perspectives to identify topics that are of particular interest to each type of Oracle Portal user.

1. To list all the tasks involved with pages, choose Page Tasks in the navigation bar Categories list, and click Go.
2. To list all the tasks of interest to a portal administrator, choose Portal Admin in the navigation bar Perspectives list, and click Go.

![Perspectives](image)

### 1.4.1.4 Exiting the help system

As well as Task Help, the help system also includes the Quick Tour, which is an introduction to Oracle Portal, access to online manuals, including this Tutorial, and Tips and Troubleshooting topics to help you with common problems or requirements. These are all accessible by clicking the buttons in the navigation bar.

To exit the help system, simply close the browser window.

### 1.4.2 Using field-level help

The following exercise introduces you to field-level help and demonstrates how to use it.

1. In the shortcut bar at the top of the page, click ![Help](image).
2. Click ![Help](image) to open the field-level help topic in a new browser window.

![Pages](image)

**Pages**

Use the Pages tab to create and manage your pages.

Top-Level Pages contains the pages designated for a wide viewing audience, as determined by the portal administrator or users/groups with the Manage privilege for All Pages. My Pages is your private storehouse for the pages you’ve created. User Pages contains all the pages created by other users to which you have been granted access, listed under the first letter of the page creator’s user ID.

**This page contains the following:**

<table>
<thead>
<tr>
<th>Path</th>
<th>Reflects the path of the currently displayed tab. On this page, the path is always Pages, the name of this tab.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Indicates what type of object resides within the container. Container objects are designated by the icon.</td>
</tr>
<tr>
<td>Name</td>
<td>Name of the container, such as Top-Level Pages, My Pages, and so on.</td>
</tr>
</tbody>
</table>

[Learning the Basics](#)
This topic provides you with information about every field, button, and link that appears on the current page.

3. Scroll down to the end of the topic.
   Most field-level help topics also include a Related topics section, which contains links to task and reference topics if you need more information.

4. To exit the field-level help topic, simply close the browser window.

1.5 Using the Navigator

The Navigator is a very powerful tool that provides access to all your Oracle Portal objects, as well as objects available to all public users.

1. If you are not already on the Navigator page, in the shortcut bar at the top of the page, click .

2. During an Oracle Portal session (that is, the time between logging on and logging off), the Navigator remembers which tab you were on the last time you used it.
   If you are not already on the Pages tab of the Navigator, click Pages.

3. If you are not already at the root level, click Pages in the Path.

4. The Navigator lists the objects that are available to you, and the actions you can perform on those objects. The list of actions varies depending on your privileges. You view an object or drill down within an object by clicking its name.
   Let’s see what other pages exist. Click Top-Level Pages to drill down.

5. Now you can see a list of the top-level pages that you have access to, and the actions you can perform on those pages. Top-level pages are pages that your portal administrator believes many people will want to access.
   Click Inside Healthy Living to display the Healthy Living portal.

6. Click your browser’s Back button to return to the Navigator.

7. If you know the name, or part of the name of the object you are looking for, you can search the current tab of the Navigator for that object.
   Click the Content Areas tab.

8. In the Find field, enter healthy.

9. Click Go.
The Navigator lists all content areas, folders, categories, styles, etc. that contain the word healthy.

10. Click Close.

1.6 Logging off and Exiting Oracle Portal

To exit Oracle Portal, simply close your Web browser or navigate to a non-Oracle Portal page.

- If you close your Web browser, you will automatically be logged off Oracle Portal.
- If you navigate to a non-Oracle Portal page, you will not be logged off Oracle Portal. When you return to a Oracle Portal page, you will not need to log on again. For security reasons, you may want to log off Oracle Portal before navigating to a non-Oracle Portal page.
  - To log off Oracle Portal, click **Logout** in the top right of the page.

1.7 Lesson Summary

Congratulations! You have completed the first lesson of this tutorial. You now know the basics of using Oracle Portal, including how to:

- Start and log on to Oracle Portal
- Use the Oracle Portal home page
- Use the online help system and field-level help
- Use the Navigator
- Log off and exit Oracle Portal

Continue reading the tutorial for more exercises on how to use Oracle Portal. To find out which chapters you should complete, see "Structure" on page xi.

For more advanced examples of what you can do with Oracle Portal, see the *Oracle Portal 3.0.8 Building Portals* manual.

For any other information about the basics of Oracle Portal, see the *Oracle Portal online help.*
Estimated completion time: 30 minutes

As defined in Chapter 1, "Learning the Basics", a portal is a Web-based application that enables your users to access content areas, external Web sites, other applications, newsfeeds, and other useful information.

To familiarize you with Oracle Portal’s portal building capabilities, this chapter leads you through the steps of creating the employee page of a portal for a fictitious company named Healthy Living Wholesalers. You should complete the following exercises if you are responsible for creating portals (that is, you are a portal administrator).

This chapter includes the following sections:

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<tr>
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</tr>
</tbody>
</table>

2.1 Before You Begin

You must start and log on to Oracle Portal. For instructions on how to do this, see Section 1.2, "Starting and Logging on to Oracle Portal" on page 1-2.
2.2 Creating a Page

A page is the face of a portal; it is what users see and use to interact with the information provided by the portal.

Suppose you are a portal administrator, working in the IT department of Healthy Living Wholesalers. You have been asked to create a portal to provide Healthy Living employees with unified access to corporate information and applications, as well as frequently used external information. The first thing you need to do is create the page that will act as the entry point to this information.

1. In the shortcut bar, click

2. If you are not already on the Pages tab of the Navigator, click Pages.

3. If you are not already at the root level, click Pages in the Path.

4. In the My Pages row, click Create.

5. In the Name field, enter <YourName>healthyliving, where YourName is your own user name.  
   
   Note: Throughout this tutorial you add your user name to the beginning of names and display names to make sure that the object you are creating is unique, and is easy to find later.

6. In the Display Name field, enter <YourName>’s Healthy Living Page.

   **Page Properties**
   Specify a name for your page (used internally only), as well as display name, which appears in the top page banner. If you wish, use the Description field to make notes to yourself about the page. The description field is visible only when you edit the page.

<table>
<thead>
<tr>
<th>Name</th>
<th>scotthealthyliving</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name</td>
<td>Scott’s Healthy Living Page</td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
</tbody>
</table>

7. You can accept the defaults on the rest of the page, so click Next.

8. In the Layout Template list, choose Two Column Layout.
The **page layout** determines how many rows and columns your page will have. These rows and columns form squares called **regions**, into which you will place content.

9. In the **Style** list, choose **Healthy Living Page Style**.

The **page style** determines the colors and fonts that appear on your page.

### Page Layout And Style

Select a layout template for the page, which determines the number and configuration of the page’s regions. Each region may contain one or more portlets, which you may specify in the next step. Next, select a style for the page, which determines the colors and fonts for your page’s content, banner and links.

10. Click **Finish**.

Your new page displays. You won’t see the two columns specified by the layout until you add content to the page.

### 2.3 Adding a Portlet to a Page

Portlets represent and provide access to Web-based information sources: Web pages, applications, business intelligence reports, syndicated content feeds, or other resources can be accessed through a portlet. In addition, Oracle Portal provides Web publishing services to create and manage portlets for content managed by Oracle Portal.
2.3.1 Adding a folder portlet

Let’s assume that the Healthy Living employee page needs to provide access to information about the company. An easy way to implement such a portlet is using Oracle Portal’s content area publishing service. For this example, this portlet has already been created; you simply need to add it to the page you just created.

**Note:** For information about how to create such a content area, see Chapter 3, "Maintaining a Content Area".

1. At the top of your Healthy Living page, click **Customize**.
   
   **Tip:** To customize a page when you are not currently viewing it, locate the page in the Navigator and click **Edit**.

2. In the **Customize for** list, make sure **Others** is chosen.
   
   Choosing this option causes the changes you make to be visible to all users of the page, not just yourself.

3. In the left region, click ![Banner](image).

4. If you are not at the root level, click **Portlet Repository** in the path at the bottom of the window.
   
   The Portlet Repository is a content area created by Oracle Portal that lists all the portlets available to you by provider.

5. Under **Other Providers**, click **Healthy Living Wholesalers**.

6. Click ![Next](image) next to the **For Our Employees** folder.
7. Click OK.

8. Click Close.

A portlet containing the home page of the Healthy Living Wholesalers content area now displays on the page.

### 2.3.2 Adding an application component portlet

Let's also assume that Healthy Living Wholesaler employees need access to information about employees within the company and the departments in which they work. An easy way to implement such a portlet is using Oracle Portal's components publishing service. For this example, this portlet has already been created; you simply need to add it to the home page you created earlier.
Adding a Portlet to a Page

**Note:** For information about how to create such a component, see Chapter 5, "Building Application Components".

1. At the top of your Healthy Living page, click **Customize**.
2. In the **Customize for** list, make sure **Others** is chosen.
3. In the right region, click **Add**.

4. If you are not at the root level, click **Portlet Repository** in the path at the bottom of the window.
5. Under **Other Providers**, click **TUTORIAL30_APPLICATION**.
6. Click  next to the **TUTORIAL_HRREPORT** (View Employees by Department) report.

7. Click **OK**.
8. Click **Close**.

A portlet containing the report now displays on the page.
2.3.3 Adding an Oracle Portal built-in portlet

Finally, let’s also assume that Healthy Living Wholesaler employees need access to a list of their favorite Web sites and pages. An easy way to implement such a portlet is to use the built-in Favorites portlets that is provided with Oracle Portal.

1. At the top of your Healthy Living page, click Customize.
2. In the Customize for list, make sure Others is chosen.
3. In the left region, click .
4. You can preview what a portlet will look like in your page before you add it, by clicking the portlet name instead of .

If you are not at the root level, click Portlet Repository in the path at the bottom of the window.
5. Under Seeded Providers, click Oracle Portal.
6. Under Personal Content, click Favorites.
7. The portlet looks good, so click Add Portlet.

8. Click OK.

9. Click Close.

The Favorites portlet is now included on your page. Now let’s take a look at how the changes you have made have affected the page.

2.4 Providing Access to a Page

You can assign different users different levels of access to a page to control exactly what they can see and interact with. For example, you will want only Human Resources staff to see some of the more sensitive employee information, such as salary.
2.4.1 Giving access to everyone

You can provide the greatest level of access to the page by making it available to public users. This means that anyone who can connect to the machine where the page is stored can view the page without having to log on.

Since the portal is corporate-wide, you should make it available to all Healthy Living employees.

1. At the top of your Healthy Living page, click Customize.
2. Click the Access tab.
3. Make sure the Display Page To Public Users check box is selected.

Exposé Page To Everyone
Select this box to make the page available to everyone, even those who are not logged on.

Display Page To Public Users

With this check box selected, all users with access to the Healthy Living Intranet can view the page.

2.4.2 Giving access to a specific user

If you want a specific user to be able to do more than simply view a page, you need to explicitly grant that user additional privileges.

Suppose you want certain users to be able to add new portlets to the Healthy Living page, or remove the existing portlets. In the following exercise you will grant the user HLW_USER Edit Contents privileges on the page.

1. In the Grantee field, enter HLW_EMPLOYEE.
2. In the list next to the Grantee field, choose Edit Contents.

Grant Access
Enter the name of the user or group to which you want to grant privileges, or click on to select a user, or click on . To select a group, then choose the level of privileges you want to grant, then click Add.

Grantee HLW_EMPLOYEE Edit Contents

3. Click Add.
Here, you can also remove users by clicking \( \times \) next to their names, or modify their privileges by choosing the privilege from the Privilege list and clicking Apply.

Note: As its creator, you are automatically given Manage privileges (the highest available) on the page.

### 2.4.3 Giving access to a group of users

You can grant privileges to multiple users in a single operation by using groups. When you grant privileges to a group, all the users who are members of that group are granted those privileges.

Suppose you want to allow many users to add other portlets to the page, but not delete the existing portlets. You can give a group of users the Customization (Add-only) privilege.

1. In the Grantee field, enter HLW_HR.
2. In the list next to the Grantee field, choose Customization (Add-only).
3. Click Add.
4. Click OK.

2.5 Lesson Summary

Congratulations! You have created a page, and given users access to it. You now know how to:

- Create a page
- Add portlets to a page
- Provide access to a page

For more advanced examples of what you can do with pages, see the Oracle Portal 3.0.8 Building Portals manual.

For any other information about building pages, see the Oracle Portal online help.
Estimated completion time: 40 minutes

An Oracle Portal content area is a service for publishing, organizing, classifying, and displaying content. Simple controls within the content area allow you to upload or directly enter your content, manage how it is represented and organized, format the way it appears on a Web page, and publish it to the appropriate user community.

Key components that make up a content area include folders that contain and display content, the content itself (termed items), and styles that define how folders and items within folders are displayed (font, size, color, position, etc.). Additional components assist users in navigating or locating content of interest (navigation bar and search), and classifying their content (categories and perspectives). Folder and item access may be explicitly granted to users or user groups.

Oracle Portal content areas are created by portal administrators for use by a particular user community or line of business. Once created, the content area can be accessed by portal users to build a folder hierarchy and upload items based on the privileges set by the content area administrator and folder owners. In this way, related content can be organized together according to a top-down information taxonomy, an established corporate organization, or a bottom-up ad-hoc structure. New content can be added to existing folders, to new folders within the existing content area, or, if appropriate, to a new content area created with a separate folder hierarchy that shares important enterprise-wide attributes.

To familiarize you with Oracle Portal’s content area building capabilities, this chapter leads you through the steps of updating the corporate content area of a fictitious company named Healthy Living Wholesalers. You should complete the following exercises if you are responsible for maintaining one or more content areas (that is, you are a content area administrator) or folders (that is, you are a folder...
owner). Exercises that apply to content area administrators only are clearly identified as such.

**Note:** Only portal administrators can create new content areas. Content area administrators and folder owners can edit only their own existing content areas or folders, they cannot create new content areas.

This chapter includes the following sections:

<table>
<thead>
<tr>
<th>Section</th>
<th>Location</th>
</tr>
</thead>
<tbody>
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<td>Page 3-2</td>
</tr>
<tr>
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<tr>
<td>Section 3.3, &quot;Creating a Category (Content Area Administrators Only)&quot;</td>
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<td>Section 3.4, &quot;Creating a Perspective (Content Area Administrators Only)&quot;</td>
<td>Page 3-6</td>
</tr>
<tr>
<td>Section 3.5, &quot;Creating a Style and Applying it to a Folder&quot;</td>
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</tr>
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</tr>
<tr>
<td>Section 3.7, &quot;Controlling Access to Your Content Area&quot;</td>
<td>Page 3-15</td>
</tr>
<tr>
<td>Section 3.8, &quot;Lesson Summary&quot;</td>
<td>Page 3-19</td>
</tr>
</tbody>
</table>

**Tip:** For more in-depth advice on how to design content areas, see the "Planning Your Web Content" chapter of the *Oracle Portal 3.0.8 Building Portals* manual.

### 3.1 Before You Begin

To complete the exercises in this chapter, you must be a content area administrator of the Healthy Living Tutorial content area. Instructions for assigning content area administrators to the Healthy Living Tutorial content area are provided in Section A.4, "Assigning a User as a Content Area Administrator of the Tutorial Content Area" on page A-2.

You must start and log on to Oracle Portal. For instructions on how to do this, see "Starting and Logging on to Oracle Portal" on page 1-2.

To familiarize yourself with the Healthy Living Tutorial content area’s structure and content, take a quick browse through the Healthy Living Tutorial content area.
Creating a Folder

A content area is divided into folders. A folder is a collection of related items, including files, URLs of other pages, text, and components. For example, the Healthy Living Tutorial content area includes the folders Our Company, Our Products, and For Our Employees. Dividing a content area into these distinct areas means you can structure your content and organize it logically. This makes it much easier for your users to find the information they need.

Note: A content area administrator can create folders anywhere in a content area. A folder owner can create folders only within the folders he or she owns.

Suppose you have been asked to take over the administration of the Healthy Living content area. This content area is used by employees, suppliers, and customers of Healthy Living Wholesalers to access information about the company.

The Healthy Living Sales department has decided to introduce an associate program, through which members can sell Healthy Living products from their own Web sites. The Sales department have put together several documents that provide useful information about the program, and wants to publish them on the Healthy Living content area where potential associates can view them.

Your first task as the content area administrator is to create a new folder to contain these documents.

1. In the shortcut bar, click \( \text{\textcolor{red}{+}} \).
2. If you are not already on the Content Areas tab of the Navigator, click Content Areas.
3. If you are not already at the root level, click Content Areas in the Path.
4. In the Healthy Living Tutorial row, click Contents.
5. Click Folders.

As you can see, some folders already exist in the content area. But none of these folders are appropriate to store information about the associate program. So you need to create a new folder.

6. Click Folder.
Creating a Folder

Note: If you cannot see the Folder link, you are probably not a content area administrator of the Healthy Living Tutorial content area. Ask your portal administrator to assign you as a content area administrator. Instructions for doing this are provided in Section A.4, "Assigning a User as a Content Area Administrator of the Tutorial Content Area" on page A-2.

7. In the Folder Type list, make sure Container is chosen.

Folder Type
Choose a folder type to add to the content area. This list includes the four base types, as well as any custom folder types that were created by your content area administrator.

8. Click Next.

9. In the Name field, enter <YourName>associate, where YourName is your own user name.

Note: Throughout this tutorial you add your user name to the beginning of names and display names to make sure that the object you are creating is unique, and is easy to find later.

10. In the Display Name field, enter <YourName>‘s Associate Program.

11. In the Category list, make sure General is chosen.

Note: You’ll find out more about categories later on in this chapter.
12. Click Finish.

You now have a folder to contain information about the associates program. The Sales department can now upload their documents into this folder.

### 3.3 Creating a Category (Content Area Administrators Only)

You must assign all items and folders that you add to a content area to a category. A category is a grouping that answers the content-specific question "What is this?". For example, the Healthy Living content area includes the categories About Us, How To, and The Product Line. Users who want information on the company itself and don’t need to know about the product line can search for items belonging to the About Us category. Categories provide you with the ability to further organize content, so that users can quickly and easily find the information they want. You can assign an item or folder to only one category.

The information about the associate program includes a document that provides answers to frequently asked questions (known as an FAQ). Since there are several FAQs covering different aspects of Healthy Living in the content area, it would be useful to create a new category for this type of document to make it easier for users to find this type of information.

1. In the Path, click Healthy Living Tutorial.
2. In the Categories row, click Create.
3. In the Name field, enter `<YourName>faq`.
4. In the Display Name field, enter `<YourName>’s FAQ`. 
5. Click Create.

A link to your new category now displays at the top of the page, which you can click to edit the category.

6. We don’t need to edit the category at this point, so click Close.

Now, when users add an FAQ document to the content area, they can assign it to this new category. Users of the content area can search the FAQ category to quickly retrieve all FAQ documents.

3.4 Creating a Perspective (Content Area Administrators Only)

When you add an item to a content area, you can assign it to one or more perspectives. A perspective is a cross-folder, cross-category grouping that answers the question "Who will be interested in this?". For example, the Healthy Living content area includes the perspectives Supplier, Employee, and HTML. Employees who want to view items that are relevant to them and don’t need to know about information relating to suppliers, can search for items belonging to the Employees perspective. Perspectives provide your users with the ability to quickly and easily find the information that interests them, without having to filter out other irrelevant information themselves.

To provide members of the associate program with quick access to all the information that they are likely to be interested in, it would be useful to have a perspective for those users.

1. In the Path, click Healthy Living Tutorial.

2. In the Perspectives row, click Create.

3. In the Name field, enter <YourName>associate.
4. In the **Display Name** field, enter `<YourName>`’s Associate.

**Perspective Properties**
Enter a name and display name for your perspective. The name identifies the perspective internally and should not contain spaces or special characters. The display name identifies the perspective to users. After you create your perspective, you can edit it by clicking the link at the top of the page.

<table>
<thead>
<tr>
<th>Parent Perspective</th>
<th>&lt;None&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td><code>ScottAssociate</code></td>
</tr>
<tr>
<td>Display Name</td>
<td><code>Scott’s Associate</code></td>
</tr>
</tbody>
</table>

5. Click **Create**.

A link to your new perspective now displays at the top of the page, which you can click to edit the perspective.

6. We don’t need to edit the perspective at this point, so click **Close**.

Now, when users add an item that is of interest to associate program members or potential members, they can assign it to this new perspective. Associate program members can search on the Associate perspective to retrieve all of the items they might need.

### 3.5 Creating a Style and Applying it to a Folder

A style is a template that controls the look and feel of content area folders and navigation bars. This template governs the colors, font properties, size, background images, banners, and other graphical elements that are common across the content area. When you create a content area, Oracle Portal automatically creates two default styles. One is applied to the folders in the content area, the other is applied to the navigation bars in the content area. Typically, you will want to either edit these default styles, or create your own to apply your own corporate look and feel.

#### 3.5.1 Creating a style

The previous content area administrator has already changed the style of the navigation bars to match the Healthy Living corporate look and feel. You now need to do the same for the folders. First, let’s create a new style to work with.

1. Click **Styles**.
Creating a Style and Applying it to a Folder

You can see the two default styles that already exist for your content area: Healthy Living Tutorial and Healthy Living Tutorial Navbar Style.

2. Click Style.

3. In the Name field, enter <YourName>hlwstyle.

4. In the Display Name field, enter <YourName>’s HLW Style.

5. In the Copy From list, choose Main Site Style.

6. Click Create.

A link to your new style now displays at the top of the page, which you can click to edit the style.

3.5.2 Editing style properties

Now that you’ve created the new style, you need to edit it to match the Healthy Living corporate style.

1. Click <YourName>’s HLW Style.

2. In the Style Element list, choose Main Banner Color.
3. In the **Color** field, enter #000066.

   **Tip:** If you do not know the hexadecimal code of the color, you can choose the color from the color palette.

4. Click the **Apply** button to the right of the **Color** field.

5. Change the colors of other style elements as listed in the table below.

   **Tip:** Remember to click **Apply** after changing each of the colors to make sure that the color is applied to each element.

<table>
<thead>
<tr>
<th>Style Element</th>
<th>Color</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sub Banner</td>
<td>#000066</td>
</tr>
<tr>
<td>Sub Banner Color</td>
<td>#6699CC</td>
</tr>
<tr>
<td>Sub Banner Link</td>
<td>#000066</td>
</tr>
<tr>
<td>Region Banner</td>
<td>#000066</td>
</tr>
<tr>
<td>Region Banner Color</td>
<td>#6699CC</td>
</tr>
<tr>
<td>Group By Banner</td>
<td>#000066</td>
</tr>
<tr>
<td>Group By Banner Color</td>
<td>#6699CC</td>
</tr>
<tr>
<td>Group By Banner Link</td>
<td>#000066</td>
</tr>
<tr>
<td>Item Display Name Link/Navigation Bar Link</td>
<td>#000066</td>
</tr>
<tr>
<td>Item Display Name Text/Navigation Bar Label</td>
<td>#000066</td>
</tr>
</tbody>
</table>
Creating a Style and Applying it to a Folder

Note: Each time you click Apply, the preview area updates to reflect your changes. After you have completed the step above the preview should look like the following:

![Preview: Folder](image)

6. Click OK.

Note: As well as banner and font colors, you can also change font size, face, style, and alignment, the height of the banners, and the placement of the folder path.

3.5.3 Applying a style to a folder

Now you need to associate the new style with a folder in your content area.

1. In the Path, click Healthy Living Tutorial.

2. Click Folders.

3. Next to the folder you created earlier (<YourName>‘s Associate Program), click Edit.

4. Click the Style tab.

5. In the Select Style list, choose <YourName>‘s HLW Style.

   The page refreshes to preview the chosen style. Here, you can also edit the style.
Creating a Style and Applying it to a Folder

Current Style
Choose a style to apply to this folder. The style preview diagram automatically reflects your choice.

Current Style: Healthy Living Tutorial
Select Style: Scott's HLW Style

Style Properties
If you want to edit the style, click the Scott's HLW Style link to display the Style Manager tabs.

6. Click Apply.
7. Click OK.
8. Click <YourName>'s Associate Program.
   
   Note: The style has been applied to the folder, but NOT to the navigation bar. You need to apply a style to the navigation bar separately. Oracle Portal separates the two because you may want to use a different style for navigation bars. For example, in the Healthy Living content area, we want a white background for the folder area, but a light blue background for the navigation bar.

9. Click your browser’s Back button.
3.6 Creating a Navigation Bar and Applying it to a Folder

Navigation bars enable users to quickly locate the Web content that they need. A typical navigation bar might contain a list of commonly accessed URLs, a basic content area search function, and a list of all of the available categories of information on a particular content area. Not every item on the navigation bar, however, needs to be an interface element. You can also include links to anything (e.g., external Web sites), static images (e.g., a logo), and static text.

When you create a content area, Oracle Portal automatically creates a default navigation bar and applies it to the content area. Typically, you will want to either edit this default navigation bar, or create your own.

3.6.1 Creating a navigation bar

There are various elements that we could include on the Healthy Living content area’s navigation bar to improve usability for its users. First, let’s create a new navigation bar.

1. In the Path, click Healthy Living Tutorial.
2. Click Navigation Bars.
   You can see the default navigation bar that already exists for your content area.
3. Click Navigation Bar.

   ![Create New Navigation Bar]

4. In the Name field, enter <YourName>hlwnavbar.
5. In the Display Name field, enter <YourName>’s HLW Navigation Bar.
6. In the Style list, choose Healthy Living Tutorial Navbar Style.
Creating a Navigation Bar and Applying it to a Folder

7. Click Create.
   A link to your new navigation bar now displays at the top of the page, which you can click to edit the navigation bar.

3.6.2 Adding elements to a navigation bar

The navigation bar that you just created is currently blank. You need to edit it to add the elements that you want to include.

1. Click <YourName>'s HLW Navigation Bar.
2. Click the Elements tab.
3. Click \[add_element\].
4. In the Element Type list, make sure Basic Elements is chosen.
5. Click Next.
6. In the Available list, select:
   - Log On/Log Off Link
   - Administration Link
   - Basic Search
   - Content Area Map
   - Portal Home
7. Click ➔.
8. Click ▲ and ▼ until the basic elements in the Selected list are in the same order as in the graphic below.

9. Click Finish.
   The preview refreshes to reflect the elements you have added to the navigation bar.
10. Click Close.
3.6.3 Applying a navigation bar to a folder

Now you need to associate the new navigation bar with a folder in your content area.

1. In the Path click Healthy Living Tutorial.
2. Click Folders.
3. Next to the folder you created earlier (<YourName>’s Associate Program), click Edit.
4. Click the Nav Bar tab.
5. Select the Select A Navigation Bar radio button.
6. In the list of navigation bars, chose <YourName>’s HLW Navigation Bar.
7. Click Apply.
   The page refreshes. Here, you can edit the navigation bar.
8. Click OK.
9. Click <YourName>’s Associate Program.
   Your navigation bar has been applied to this folder.
10. Click your browser’s Back button.

3.7 Controlling Access to Your Content Area

Each folder in your content area is either public or non-public. If it is public, all users may view its contents without logging on. If it is non-public, only users who are logged on and have explicit View Contents privileges on the folder may view its contents.

Until users log on to the content area, they are public users and can only view content. Moreover, as public users, they can view content in public folders only. For greater access to the content area, users must log on. Once users are logged on,
Oracle Portal can determine which other tasks they can perform and which other non-public folders they can access.

For example, you may have a folder (say, your content area’s root folder) that you want everyone to be able to view, but you want only one particular user to be able to add content to it. To enable this, you need to first make sure the root folder is a public folder, and then explicitly grant the content contributor Manage Items privileges on the folder.

Or, you may have a folder that you want only a restricted number of users to be able to view. In that case, you would make the folder non-public, and grant each restricted user View Content privileges on the folder. If the number of restricted users is fairly large, you might consider creating a group for those users and granting folder privileges to the group rather than to each individual user.

There are various levels of access to a folder:

<table>
<thead>
<tr>
<th>With these privileges:</th>
<th>Users can:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Own Folder</td>
<td>Perform all folder tasks, including granting folder privileges to other users.</td>
</tr>
<tr>
<td></td>
<td>Distributing folder ownership means that folder-level tasks are more likely to be completed in a timely fashion, and don’t just get tagged on to the end of the content area administrator’s to-do list.</td>
</tr>
<tr>
<td></td>
<td>The content area administrator automatically has Own Folder privileges on every folder in the content area.</td>
</tr>
<tr>
<td>View Content</td>
<td>View any item in the folder.</td>
</tr>
<tr>
<td>Edit Style</td>
<td>Make changes to the folder’s style.</td>
</tr>
<tr>
<td>Manage Items</td>
<td>Add, edit, and delete items in the folder.</td>
</tr>
<tr>
<td></td>
<td>Delegating content ownership means that content is maintained by the users who know it best, and thus is more likely to be kept accurate and up-to-date.</td>
</tr>
<tr>
<td>Create With Approval</td>
<td>Add new items to the folder. Items that are added by users with Create With Approval privileges must be approved by the folder owner before they are visible to other users.</td>
</tr>
</tbody>
</table>

**Note:** You can also provide security at the item level. For more information, visit the Oracle Portal Online Help, In the **Search** field, enter **security**, and click **Go**.
3.7.1 Providing access to everyone

If you have public information within your content area, you can allow any user who displays the content area to view that information, including those users who are not logged on.

Anyone who accesses the Healthy Living content area should be able to view the contents of the Associate Program folder that you created earlier, without having to log on.

1. In the <YourName>’s Associate Program row, click Edit.
2. Click the Access tab.
3. Select the Make Public check box.
4. Click Apply.

Now, any user can view the contents of your Associate Program folder.

Access Settings
Select Make Public to display this folder to all users, even those who are not logged on. Then, select Enable Item Level Security to enable security on individual items in the folder. Security at the item level affects the runtime and disables folder caching.

- Make Public
- Enable Item Level Security

3.7.2 Providing access for a specific user

If you want to give a user access beyond being able to view public folders, you need to explicitly grant that user privileges on folders.

One of the benefits of Oracle Portal is that you can distribute the responsibility of adding content to those users who actually create the content without compromising security. Let’s grant a user privileges to add content to the Associate Program folder.

1. In the Name field, enter HLW_EMPLOYEE.
2. Click Add To Access List.

3. Select the Manage Items check box.

**Grant Access**
Enter the name of the user or group for which you want to grant the folder access privileges, or click [ ] to select a user, or click [ ] to select a group, then click Add To Access List.

<table>
<thead>
<tr>
<th>Name</th>
<th>HLW_EMPLOYEE</th>
</tr>
</thead>
</table>

**Change Access**
Choose the level of folder access privileges that you want to grant to a user or group by checking the appropriate box, or click [ ] to revoke the user or group's access entirely.

<table>
<thead>
<tr>
<th>Grantee Name</th>
<th>Grantee Type</th>
<th>Own Folder</th>
<th>View Content</th>
<th>Edit Style</th>
<th>Manage Items</th>
<th>Create With Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>HLW_EMPLOYEE</td>
<td>USER</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SCOTT</td>
<td>USER</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** You created the folder, so you are automatically assigned as the folder owner.

4. Click Apply.

HLW_EMPLOYEE can now add, edit, and delete items in the Associate Program folder.

### 3.7.3 Providing access for multiple users

You can also grant the same folder access privileges to multiple users. For example, suppose you want to allow all members of a particular department to be able to add content to their department’s folder. You could grant privileges to each user individually, but that is time consuming and difficult to maintain, especially if the same users need to be given access to several different folders. Instead, you can create a group containing these users, then grant folder access privileges to the group.

When you grant a privilege to a group, that privilege applies to every member of that group. So, when a new employee joins the department, you can simply add him or her to the group. Doing so gives the new employee the same folder privileges as other members of his or her department.
Suppose you want to allow several users the ability to add items to the Associate Program folder. However, the owner of the folder wants to approve the items added by these users before they become available to other users.

1. In the Name field, enter HLW_HR.

**Grant Access**
Enter the name of the user or group for which you want to grant the folder access privileges, or click [ ] to select a user, or click [ ] to select a group, then click Add To Access List.

2. Click Add to Access List.

3. Select the Create With Approval check box.

**Change Access**
Choose the level of folder access privileges that you want to grant to a user or group by checking the appropriate box, or click [ ] to revoke the user or group's access entirely.

<table>
<thead>
<tr>
<th>Grantee Name</th>
<th>Grantee Type</th>
<th>Own Folder</th>
<th>View Content</th>
<th>Edit Style</th>
<th>Manage Items</th>
<th>Create With Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>HLW_EMPLOYEE</td>
<td>USER</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>HLW_HR</td>
<td>GROUP</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>SCOTT</td>
<td>USER</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
</tr>
</tbody>
</table>

4. Click Apply.

5. Click OK.

All the members of the HLW_HR group can now add items to the Associate Program folder. These items will not display to other users until the folder owner approves them.

### 3.8 Lesson Summary

Congratulations! You have updated the Healthy Living Tutorial content area. You now know how to:

- Create a folder
- Create a category
Lesson Summary

- Create a perspective
- Create a style and apply it to a content area
- Create a navigation bar and apply it to a content area
- Provide access to a content area

For more information about building content areas, see the Oracle Portal online help.
Adding Items to a Content Area

Estimated completion time: 30 minutes

This chapter shows you how to add items to a content area. Items are the basic unit in an Oracle Portal content area. Oracle Portal can display any browser-renderable content. Supported item types include file, folder link, image/imagemap, PL/SQL, text, URL, Java application, Zip file (for adding a set of files), and Oracle Portal application components (reports, forms, charts, menus, frame drivers, etc.).

To familiarize you with Oracle Portal’s item creation capabilities, this chapter leads you through the steps of adding several items to the content area of a fictitious company named Healthy Living Wholesalers. You should complete the exercises in this chapter if you contribute content to one or more folders in a content area.

This chapter includes the following sections:

<table>
<thead>
<tr>
<th>Section</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Section 4.1, &quot;Before You Begin&quot;</td>
<td>Page 4-1</td>
</tr>
<tr>
<td>Section 4.2, &quot;Adding Items to a Folder&quot;</td>
<td>Page 4-2</td>
</tr>
<tr>
<td>Section 4.3, &quot;Editing an Item&quot;</td>
<td>Page 4-11</td>
</tr>
<tr>
<td>Section 4.4, &quot;Lesson Summary&quot;</td>
<td>Page 4-12</td>
</tr>
</tbody>
</table>

4.1 Before You Begin

To complete the exercises in this chapter you must have Manage Items privileges on the For Our Employees folder in the Healthy Living Tutorial content area. Instructions for granting Manage Items privileges on this folder are provided in Section A.5, "Granting a User Manage Items Privileges on the For Our Employees Folder of the Tutorial Content Area” on page A-3.
You must start and log on to Oracle Portal. For instructions on how to do this, see "Starting and Logging on to Oracle Portal" on page 1-2.

To familiarize yourself with the Healthy Living Tutorial content area’s structure and content, take a quick browse through the Healthy Living Tutorial content area.

4.2 Adding Items to a Folder

A content area is made up of folders which divide the content area into areas of interest. You can organize your files (Word documents, Excel files, etc.), URLs for external Web sites, Oracle Portal application components, etc., into these folders. Such files, URLs, components, etc. are called items.

The following table shows you all the content and functionality you would typically want to provide through a content area, and how to provide that content and functionality using Oracle Portal:

<table>
<thead>
<tr>
<th>To:</th>
<th>Add an item of the following type:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upload a file (for example, a document or spreadsheet).</td>
<td>File</td>
</tr>
<tr>
<td>Link to another folder.</td>
<td>Folder Link</td>
</tr>
<tr>
<td>Display an image that can also contain links to different URLs.</td>
<td>Image</td>
</tr>
<tr>
<td>Upload a Java Server Page (JSP) application as a JAR file.</td>
<td>Java Application</td>
</tr>
<tr>
<td>Execute a PL/SQL procedure.</td>
<td>PL/SQL</td>
</tr>
<tr>
<td>Display plain text.</td>
<td>Text</td>
</tr>
<tr>
<td>Link to another Web page or site.</td>
<td>URL</td>
</tr>
<tr>
<td>Display a Oracle Portal component (for example, a form or report).</td>
<td>Oracle Portal Component</td>
</tr>
<tr>
<td>Upload a ZIP file. You can then unzip the item to upload all of items in the ZIP file. This offers an easy way to add multiple files to a content area.</td>
<td>Zip File</td>
</tr>
</tbody>
</table>

4-2 Oracle Portal Tutorial
4.2.1 Adding a link to another Web page or site

Often, you will want to include links to other Web sites or pages in your content area to point users to other sources of information.

Suppose Healthy Living employees need to regularly access an online news source, such as CNN.com. As the folder owner, you can add this URL as an item to the For Our Employees folder.

1. In the shortcut bar, click .
2. If you are not already on the Content Areas tab of the Navigator, click Content Areas.
3. If you are not already at the root level, click Content Areas in the Path.
4. Click Healthy Living Tutorial.
5. Click For Our Employees.

6. In the main banner, click Edit Folder to switch to Edit mode.

Note: The Edit Folder link displays for this folder because you have editing privileges on it. You did not have editing privileges on the previous folder, which is why the Edit Folder link did not display there.
7. In the Folder Dashboard, click Add Item.

8. In the Item Type list, choose URL.

9. Click Next.

10. Select the Quickpicks radio button.

    Selecting the Quickpicks region determines that the URL will display at the top of the folder. These regions and their layout are specified in the folder’s style. Whenever you add a an item, you choose the region where that item will display within the folder.

    The For Our Employees folder is divided into the following regions: Quickpicks, Announcements, Sub-folders, News, Regular Items.


12. In the Display Name field, enter <YourName> News from CNN, where YourName is your own user name.

    Note: Throughout this tutorial you add your user name to the beginning of names and display names to make sure that the object you are creating is unique, and is easy to find later.

13. In the Category list, make sure General is chosen.

    Assigning your item to a category lets users know what the item is and helps them quickly and easily decide whether a particular item is what they are looking for. For example, the Healthy Living content area includes the categories About Us, How To, and The Product Line.

    Note: For more information about categories, visit the Oracle Portal Online Help. In the Search field, enter category, and click Go.
14. Click Finish.

15. Click <YourName> News from CNN to view the item.

16. Click your browser’s Back button.

### 4.2.2 Adding text

Sometimes, you might want to quickly add a bit of information to your content area. The best way to do this is to add a text item.

Suppose you want to announce that this week Healthy Living employees can sign up for the annual corporate picnic in the office lobby.
1. In the Folder Dashboard, click Add Item.
2. In the Item Type list, choose Text.

**Item Properties**
Select the type of item you want to add to this folder, then click Next.

![Item Properties](image)

3. Click Next.
4. Select the News radio button.
5. In the Text field, enter the following text:
   
   This week, sign up for the annual corporate picnic in the lobby. This year’s picnic promises to offer a great day out, with many fun activities planned and as much barbequed food as you can eat! You won’t want to miss it!

6. In the Display Name field, enter `<YourName> Sign up for the Corporate Picnic!`.
7. In the Category list, make sure General is chosen.
8. Select the *Expires In* radio button, and enter 7 in the field.

The information in this item is applicable only until the end of the sign-up period. Assigning an expiration period means that you don’t have to remember to remove this item from the folder; it will be automatically removed.

**Note:** Even though the item no longer displays, it is not deleted from the database until the content area administrator purges expired items.

**Expiration Period**

Choose whether this item is always available, available only for a specified number of days, or if it expires on a certain date.

- **Never Expires**
- **Expires In [n] Days**
- **Expires On [DD-MON-YYYY]**
Adding Items to a Folder

9. Click Next.

10. Select the Item Displayed Directly In Folder Area radio button.

   This is an important piece of information, and you want users to see it immediately when they display the folder. Displaying the item “in place” displays the item directly in the folder; users do not have to click a link to display the item.

**Display Options**

Choose how the test item displays when the item is clicked in the right pane of the browser window, directly below the item’s display name, in your current browser window (no navigation bar), or in another browser window.

- Link That Displays Item In Folder Area
- Item Displayed Directly In Folder Area
- Link That Displays Item In Full Browser Window
- Link That Displays Item In New Browser Window

11. Click Finish.

   The new item displays in a different region of the folder than the previous item because you selected the News region, rather than the Quickpicks region.

4.2.3 Adding access to data

You can also use Oracle Portal to create applications that enable users to access corporate data. Once you’ve created such applications, you can add them to your content area to make them available to your users.
Adding Items to a Folder

Note: Only application developers can create applications. If you are not an application developer, you can add applications that others have created for you.

Your IT department has created a report that lists Healthy Living employees by department, and you’d like to make it available to Healthy Living employees.

1. In the Folder Dashboard, click Add Item.
2. In the Item Type list, make sure Application Component is chosen.

**Item Properties**

Select the type of item you want to add to this folder, then click Next.

<table>
<thead>
<tr>
<th>Item Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Component</td>
</tr>
</tbody>
</table>

3. Click Next.
4. Make sure the Regular Items radio button is selected.
5. In the Application Component list, choose TUTORIAL30_APPLICATION: TUTORIAL_HRREPORT.
6. In the Display Name field, enter <YourName> View Employees by Department.
7. In the Category list, make sure General is chosen.

**Folder Region**

Click the radio button beside the name of the region where you want this item to appear.

- Quickpicks
- Announcements
- Sub-folders
- News
- Regular Items

**Primary Item Attributes**

Select the component to execute when this item is clicked. Enter a display name for the item’s link text which appears in the folder area. Select a category that best describes the item’s content, then enter a description.

<table>
<thead>
<tr>
<th>Application Component</th>
</tr>
</thead>
<tbody>
<tr>
<td>TUTORIAL30_APPLICATION: TUTORIAL_HRREPORT</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scott View Employees by Department</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
</tr>
</tbody>
</table>
Adding Items to a Folder

8. Click Next.

9. In the Perspectives list, select Employee.

10. Click .

Assigning your item to a perspective gives users more information to enable them to decide whether the item is likely to be of interest to them. For example, the Healthy Living content area includes the perspectives Supplier, Employee, and HTML.

Note: For more information about perspectives, visit the Oracle Portal Online Help. In the Search field, enter perspective, and click Go.

Secondary Item Attributes
Choose perspective(s) for this item. Enter the location of the image file and select the image alignment. Edit the keyword(s) that will help locate the item during a search, and edit the author name. Set document control on the item so that it may be shared between users via a check-in and check-out process. You can also choose to hide the item in View mode.

<table>
<thead>
<tr>
<th>Available Perspectives</th>
<th>Displayed Perspectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>HTML</td>
<td>Employees</td>
</tr>
<tr>
<td>On Sale</td>
<td></td>
</tr>
<tr>
<td>PDF</td>
<td></td>
</tr>
<tr>
<td>Scott's Associate</td>
<td></td>
</tr>
<tr>
<td>Supplier</td>
<td></td>
</tr>
</tbody>
</table>

11. Click Finish.
4.3 Editing an Item

When you are in Edit mode, a toolbar displays to the left of each item.

Here, you have access to tools that enable you to perform different operations on the item, including editing ( ), moving ( ), and deleting ( ).

Currently, when users click the News from CNN link, the CNN Web site overwrites the Healthy Living content area. Suppose you want the CNN Web site to display in a separate browser window, so that it is easier for users to get back to the Healthy Living content area.

1. Click next to your CNN item.
2. Click the Secondary tab.
3. Select the Link That Displays Item In New Browser Window radio button.

**Display Options**

Choose how to display the results of the URL item: in the right pane of the browser window, directly below the item's display name, in your current browser window (no navigation bar), or in another browser window.

- Link That Displays Item In Folder Area
- Item Displayed Directly In Folder Area
- Link That Displays Item In Full Browser Window
- Link That Displays Item In New Browser Window

4. Click OK.
5. Suppose you also want to make sure that users can quickly and easily find the Corporate Picnic item. You can increase the likelihood of users finding an item during a search by adding keywords to the item.

   Click next to your corporate picnic item.

6. Click the Secondary tab.
7. In the Basic Search Keywords field, enter event.

   Adding this keyword to the item means that if users perform a search on the word event to find out what events are taking place, they will find your item,
even though the word event doesn’t appear in the item’s display name, description, or content.

8. Click OK.
9. Let’s test this keyword.
   In the navigation bar Search field, enter event.

10. Click Go.
    The search returns the Corporate Picnic item because you added the event keyword to it.
11. In the title banner, click to return to the content area’s home page.

4.4 Lesson Summary
Congratulations! You have added items to a content area. You now know how to:
- Add links to other Web pages and sites to a content area
- Add text to a content area
- Add Oracle Portal application components to a content area
- Edit an item and:
  - Change how it is displayed in a folder
  - Add keywords

For more information about adding items, see the Oracle Portal online help.
Building Application Components

Estimated completion time: 50 minutes

This chapter shows you how to build Oracle Portal application components (forms, reports, charts, links, etc.).

To familiarize you with Oracle Portal’s component building capabilities, this chapter leads you through the steps of creating components in a simple human resources application for a fictitious company named Healthy Living Wholesalers. You should complete the exercises in this chapter if you are responsible for creating application components within your organization.

This chapter includes the following sections:

<table>
<thead>
<tr>
<th>Section</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Section 5.1, &quot;Before You Begin&quot;</td>
<td>Page 5-1</td>
</tr>
<tr>
<td>Section 5.2, &quot;Creating an Application Component&quot;</td>
<td>Page 5-2</td>
</tr>
<tr>
<td>Section 5.3, &quot;Controlling Access to an Application Component&quot;</td>
<td>Page 5-21</td>
</tr>
<tr>
<td>Section 5.4, &quot;Lesson Summary&quot;</td>
<td>Page 5-23</td>
</tr>
</tbody>
</table>

5.1 Before You Begin

To complete the exercises in this chapter you must have Manage privileges on the Tutorial30 Application. Instructions for granting users these privileges are provided in Section A.6, "Granting a User Manage Privileges on the Tutorial Application" on page A-3.

You must start and log on to Oracle Portal. For instructions on how to do this, see "Starting and Logging on to Oracle Portal" on page 1-2.
## 5.2 Creating an Application Component

Components are Web pages with content based on data stored in the database. Some components, such as reports, display data in a graphical format. Others, such as forms, provide interfaces that users can use to change data. You can create the following components in Oracle Portal:

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forms</td>
<td>Provide an interface to one or more database tables, views, or procedures.</td>
</tr>
<tr>
<td>Reports</td>
<td>Display the results of a SQL query in tabular format.</td>
</tr>
<tr>
<td>Charts</td>
<td>Display the results of a SQL query as a bar chart. Charts are based on at least two table or view columns: one that identifies the bars on the chart and one that calculates the size of the bars on the chart.</td>
</tr>
<tr>
<td>Calendars</td>
<td>Display the results of a SQL query in calendar format. At least one of the table columns in the query must contain values of the Date datatype.</td>
</tr>
<tr>
<td>Dynamic Pages</td>
<td>Display dynamic database data based on SQL or PL/SQL which is executed every time the page is requested.</td>
</tr>
<tr>
<td>XML Components</td>
<td>Display XML pages.</td>
</tr>
<tr>
<td>Hierarchies</td>
<td>Display data from a self-referencing table or view (at least two columns in the table must share a recursive relationship). Hierarchies 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.</td>
</tr>
<tr>
<td>Menus</td>
<td>Display Web pages containing options that users can click to navigate to other components, URLs, or other menus.</td>
</tr>
<tr>
<td>URL Components</td>
<td>Display the contents of URLs.</td>
</tr>
<tr>
<td>Frame Drivers</td>
<td>Consist of Web pages divided into two frames. One frame (the driving frame) contains a SQL query that drives the contents of a second frame (the target frame).</td>
</tr>
<tr>
<td>Links</td>
<td>Provide hypertext links that enable users to navigate between components.</td>
</tr>
<tr>
<td>Lists of Values</td>
<td>Provide selectable parameters for fields in components. Lists of Values can be displayed in formats such as combo boxes or radio buttons.</td>
</tr>
</tbody>
</table>
There is a separate component build wizard for each type of component. Each wizard creates PL/SQL stored procedures. When executed, the stored procedures dynamically create the HTML and JavaScript code to display the component.

You are a member of the Healthy Living IT department, and have been asked to create several components for the Human Resources department that enable HR staff to maintain information about the company’s employees.

### 5.2.1 Creating a form

The first component you have been asked to include in your application is a form for updating existing employees’ personal information, such as their address and telephone number.

1. In the shortcut bar, click 🏛️.
2. If you are not already on the Applications tab of the Navigator, click Applications.
3. If you are not already at the root level, click Applications in the Path.
4. Click TUTORIAL30_APPLICATION to drill down into the tutorial Human Resources application.
   
   **Note:** If you cannot see this application, notify your portal administrator.

5. Click Form.

**Note:** If you cannot see the Form link, you probably do not have Manage privileges on TUTORIAL30_APPLICATION. Ask your portal administrator to grant you these privileges. Instructions for doing this are provided in Section A.6, "Granting a User Manage Privileges on the Tutorial Application" on page A-3.

6. You can build the following types of forms:
   - Form based on table or view: Displays fields and buttons for querying, inserting, updating, and deleting the data contained in a table or view.
Creating an Application Component

- **Master-detail form**: Displays a master row and multiple detail rows within a single HTML page. With this form, users can query, insert, update, and delete data in two tables or views.

- **Form based on procedure**: Displays fields and buttons for entering arguments and passing them to a procedure.

HR staff will use our form for updating data that is contained in a single table (the HLW_STAFF table), so click **Form based on table or view**.

7. In the **Name** field, enter `<YourName>hrform`.
   
   **Note**: Throughout this tutorial you add your user name to the beginning of names and display names to make sure that the object you are creating is unique, and is easy to find later.

8. In the **Display Name** field, enter `<YourName> Update Employee Details`.

9. In the **Application** list, make sure **TUTORIAL30_APPLICATION** is chosen.

**Form Name and Application**

Enter a name for the form and choose the application that will own it. The applications that you can choose in this step are those in which you have been granted privileges to build components.

<table>
<thead>
<tr>
<th>Name</th>
<th>boosthrform</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name</td>
<td>Scott Update Employee Details</td>
</tr>
<tr>
<td>Application</td>
<td>TUTORIAL30_APPLICATION</td>
</tr>
</tbody>
</table>

10. Click **Next**.

11. In the **Table or View** field, enter `<demo_schema>.hlw_staff`, where demo_schema is the name of the schema where the Oracle Portal demos are installed.
   
   **Note**: If you are not sure of the name of the demo schema contact your portal administrator.

**Table or View**

Choose a table or view on which to base your form. The tables and views that you can choose in this step are accessible from the application you selected in the previous step.

<table>
<thead>
<tr>
<th>Table or View</th>
<th>HLWPORTAL демо.ELU_STAFF</th>
</tr>
</thead>
</table>
12. Click Next.

13. Make sure the **Tabular** radio button is selected.

A tabular layout allows you to define the layout of the form using options in the wizard. A custom layout lets you write your own HTML code to control the layout of the form yourself.

**Form Layout**

Choose a layout for the form. Tabular forms are based on options you choose in the form wizard. Custom forms are based on HTML code you enter in a later wizard step.

- Tabular
- Custom

14. At this point, you have entered all the required information. The wizard can apply defaults to the remaining properties. So click **Finish** and let's take a look at your new form.

The Manage Component page displays, where you can perform any task on your component that you might need, such as editing, deleting, copying (from the Manage tab), and defining access (from the Access tab).

15. On the Develop tab, click **Run**.
Creating an Application Component

5-6  Oracle Portal Tutorial

The form doesn’t look too bad, but it could use some improvement. For example, our form is for querying and updating data only, but there is still an Insert button displayed at the top and bottom of the form; there are far more fields included than we really need; and the field labels aren’t particularly user-friendly. So let’s edit the form and make some changes.

16. Close the browser window that contains the form.

17. On the Develop tab of the Manage Component page, click Edit.

18. First, let’s remove the buttons that we don’t want on the form.

   In the left frame, click , then click OK to remove the following buttons from the form:
19. Not all the columns in the HLW_STAFF table are appropriate for our form. Some of them contain data that will not change (such as EMPLOYEE_GENDER and HIRE_DATE), and others will be updated using different components (for example, you would probably have a separate form for updating MANAGER_ID, DEPARTMENT_NO, REGION_ID, etc., for when an employee transfers to a different department). Let’s remove the columns that we don’t need.

In the left frame, click \( \times \), then click **OK** to remove the following columns from the form:

- JOB
- EMPLOYEE_GENDER
- EMAIL_ID
- USER_ID
- HIRE_DATE
- ANNUAL_SALARY
- COMMISSION
- MANAGER_ID
- DEPARTMENT_NO
- REGION_ID
- BUDGET
- VACATION_DAYS
- CCR_ID

**Note:** This removes the fields based on the columns from the form; it does not delete the columns from the underlying table.

20. We are left with the following:
21. The wizard has defaulted the field labels based on the column names. In most cases we want to change these labels to something more meaningful, or format them to include spaces.

In the left frame, click EMPLOYEE_ID.

22. In the **Label** field, enter Employee Id.

<table>
<thead>
<tr>
<th>Display Options</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Label</td>
<td>Employee Id</td>
<td>Font Face</td>
<td>Browser Default</td>
</tr>
<tr>
<td>Link</td>
<td></td>
<td>Font Color</td>
<td>Red</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Font Size</td>
<td>12pt</td>
</tr>
</tbody>
</table>

23. (Optional) Change the rest of the field labels as follows:

<table>
<thead>
<tr>
<th>Old field label</th>
<th>New field label</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Full Name</td>
</tr>
</tbody>
</table>
24. At the moment the State and Zip Code fields are in the wrong order: State should come before Zip Code. Let’s fix that now.

In the left frame, next to EMPLOYEE_STATE, click \( \uparrow \) to move the State field above Zip Code.

25. Also, to conserve space, let’s place the State and Zip Code fields on the same line.

In the left frame, click EMPLOYEE_ZIP.


27. We can also brighten up the form by adding some color to it.

In the left frame, click FORM. This lets you change the properties of the overall form, rather than the individual fields.

28. In the Box Background Color list, choose Blue, Light.

29. In the Box Border list, choose Thin Border.
30. We should probably add some explanatory text above the form, to explain to users how to use it.

Click the (Form Text) tab.

31. In the Header Text field, enter the following:

Enter the id of the employee that you want to update, then click Query.
Change the employee’s details as necessary, then click Update.

You can also use this tab to change the template used by your form. Templates are shared components that determine the appearance of the page on which a component is displayed, and help you to provide a consistent look across all your components. Oracle Portal is shipped with several templates to start you off, but you can create your own to match your particular organization’s standards.

Note: For information about creating templates, visit the Oracle Portal Online Help. In the Search field, enter template, and click Go.

32. For the moment, we have made all the changes we need to make to the form, so click OK.
33. On the Develop tab of the Manage Component page, click **Run** to view the changes you made.

34. Close the browser window that contains the form.

Of course, there are many more things you can do with Oracle Portal forms, for example, you can add JavaScript form- and field-level validation, or specify PL/SQL code to execute at different points during the execution of the form.

**Note:** For more information about JavaScript in Oracle Portal, visit the *Oracle Portal Online Help*. In the *Search* field, enter *javascript*, and click **Go**.

35. Click **Close** to return to the Navigator.

### 5.2.2 Creating a report

The HR department has also requested that they be able to find out which employees are members of which departments. The best way to provide this information is by creating a report that lists employees by department. Let’s create that report now.

1. If you are not already on the Navigator page, in the shortcut bar, click ![Navigator](image).
2. Click **Report**.
3. You can build the following types of reports:
Creating an Application Component

- **Query By Example (QBE) Reports**: Allows you to create a report for querying, inserting, updating, and deleting data from a table or view.

- **Reports From Query Wizard**: Provides a wizard that guides you through all the steps for creating a report, including creating the SQL query that selects the data displayed in the report.

- **Reports From SQL Query**: Provides a wizard that guides you through the steps for creating a report, but allows you to write your own SQL query to select the data displayed in the report.

Our report is for viewing data only, and requires a simple query, so click **Reports From Query Wizard**.

4. In the **Name** field, enter `<YourName>hrreport`.

5. In the **Display Name** field, enter `<YourName> View Employees by Department`.

6. In the **Application** list, make sure `TUTORIAL30_APPLICATION` is chosen.

### Report Name and Application

Enter a name for the report and choose the application that will own it. The applications that you can choose in this step are those in which you have privileges to build components:

<table>
<thead>
<tr>
<th>Name</th>
<th>ScottReport</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name</td>
<td>Scott View Employee by Department</td>
</tr>
<tr>
<td>Application</td>
<td>TUTORIAL30_APPLICATION</td>
</tr>
</tbody>
</table>

7. Click **Next**.

8. Most of the data required for the report is contained in the HLW_STAFF table. In the **Tables or Views** field, enter `<demo_schema>.hlw_staff`.

9. Click **Add**.

10. However, in addition to the number of each department, we also want to include their names. This data is provided in the HLW_DEPARTMENTS table, so we also need to add this table to the report query.

    In the **Tables or Views** field, enter `<demo_schema>.hlw_departments`.

11. Click **Add**.
Creating an Application Component

12. You could click Finish here and let the wizard provide default values for the remaining report properties, but we want to specify some more details first, so click Next.

13. Each department in the HLW_DEPARTMENTS table is uniquely identified by its own number (DEPARTMENT_NO). This is known as a primary key. Each employee in the HLW_STAFF table is associated with a department number, which maps to the numbers used in the HLW_DEPARTMENTS table. This is known as a foreign key. Because this relationship exists between these two tables, we can ensure that the correct department name is retrieved for each employee.

For the report to work correctly, this relationship needs to be specified in the report query as a join condition.

In the first left Column list, choose HLW_STAFF.DEPARTMENT_NO.

14. In the first right Column list, choose HLW_DEPARTMENTS.DEPARTMENT_NO.

Join Conditions
Choose table or view columns that will be joined to one another. Default join conditions have been automatically generated. You can accept the join conditions shown below or modify them.

15. Click Next.
16. Now we need to select which data to include in the report. All the HR department are interested in is the employee number, name, and job, and the department number and name.

In the **Available Columns** list select the following columns, then click `>`:

- HLW_STAFF.EMPLOYEE_ID
- HLW_STAFF.NAME
- HLW_STAFF.JOB
- HLW_STAFF.DEPARTMENT_NO
- HLW_DEPARTMENTS.NAME

**Table or View Columns**

Choose one or more table or view columns on which to base your report. Use the buttons below to move one or more table or view columns from the **Columns** list to the **Selected Columns** list. Use the up and down arrow keys to arrange the order that columns display on the report.

<table>
<thead>
<tr>
<th>Columns</th>
<th>Selected Columns</th>
</tr>
</thead>
<tbody>
<tr>
<td>HLW_STAFF.EMPLOYEE_ID</td>
<td>HLW_STAFF.EMPLOYEE_ID</td>
</tr>
<tr>
<td>HLW_STAFF.NAME</td>
<td>HLW_STAFF.NAME</td>
</tr>
<tr>
<td>HLW_STAFF.JOB</td>
<td>HLW_STAFF.JOB</td>
</tr>
<tr>
<td>HLW_STAFF.DEPARTMENT_NO</td>
<td>HLW_STAFF.DEPARTMENT_NO</td>
</tr>
<tr>
<td>HLW_DEPARTMENTS.NAME</td>
<td>HLW_DEPARTMENTS.NAME</td>
</tr>
</tbody>
</table>

17. You can accept the defaults for the remaining properties, so click **Finish** to display the Manage Component page.

18. On the Develop tab of the Manage Component page, click **Run**.
Creating an Application Component

As with the form, this first attempt at creating the report doesn’t look too bad, but it could also use some improvement. For example, the department number and name do not need to be repeated for each row, and the order of the columns and rows should probably be rearranged slightly to make it easier for users to find the information they want. So let’s edit the report and make some changes.

19. Close the browser window that contains the report.


21. First, let’s change the order of the columns in the report to display the department information first.

   Click the (Table or View Columns) tab.

22. Use the ▲ and ▼ buttons to reorder the columns as follows:
23. To remove duplication of repeating values, you need to specify **break options** for the report.

   Click the **Display Options** tab.

24. In the **First Break Column** list, choose **HLW_STAFF.DEPARTMENT_NO**.

25. In the **Second Break Column** list, choose **HLW_DEPARTMENTS.NAME**.

26. If you choose to break your report on certain columns, you also need to order the report by those columns.

   In the **Order by** list, choose **HLW_STAFF.DEPARTMENT_NO**.

27. In the first **then by** list, choose **HLW_DEPARTMENTS.NAME**.

28. To make it easier to find an employee within a department, let’s also order the report by employee ID.

   In the second **then by** list, choose **HLW_STAFF.EMPLOYEE_ID**.
29. You can also use this tab to add some colors and borders to your report, as we did with the form, but for now we have made the changes we wanted to make, so click **OK**.

30. On the Develop tab of the Manage Component page, click **Run** to view the changes you made.
31. Close the browser window that contains the report.

Oracle Portal offers many more report features, for example, you can apply formatting conditions to change the appearance of information in your report based on the values of data, or add a customization form, which allows users to restrict the query results to meet their own specific requirements.

**Note:** For more information about building reports, visit the Oracle Portal Online Help. In the **Search** field, enter report, and click **Go**.

32. Click **Close** to return to the Navigator.

### 5.2.3 Creating a chart

The final request the HR department has made, is for a component to show how much each department spends on salaries. This kind of information is perfect for displaying in a chart.
1. If you are not already on the Navigator page, in the shortcut bar, click .

2. Click Chart.

3. You can build the following types of charts:
   - **Charts From Query Wizard**: Provides a wizard that guides you through all the steps for creating a chart, including creating the SQL query that selects the data displayed in the report.
   - **Charts From SQL Query**: Provides a wizard that guides you through the steps for creating a chart, but allows you to write your own SQL query to select the data displayed in the report.

   Our chart requires a simple query, so click **Charts From Query Wizard**.

4. In the **Name** field, enter `<YourName>hrchart`.

5. In the **Display Name** field, enter `<YourName> View Salary per Department`.

6. In the **Application** list, make sure **TUTORIAL30_APPLICATION** is chosen.

   **Chart Name and Application**
   Enter a name for the chart and choose the application that will own it. The applications that you can choose in this step are those in which you have been granted privileges to build components.

<table>
<thead>
<tr>
<th>Name</th>
<th>scotthrchart</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Name</td>
<td>Scott View Salary per Department</td>
</tr>
<tr>
<td>Application</td>
<td>TUTORIAL30_APPLICATION</td>
</tr>
</tbody>
</table>

7. Click Next.

8. In the **Tables/Views** field, enter `<demo_schema>.hlw_staff`.

   **Table or View**
   Choose a table or view on which to base your chart. The tables and views that you can choose in this step are accessible from the application you selected in the previous step.

   | Tables/Views | HLWPORTAL_DEMO.HLW_STAFF |

9. Click Next.
10. In the **Label** list, choose **DEPARTMENT_NO**.
   The values of the column specified in the **Label** field are displayed along the axis of the chart.

11. In the **Value** list, choose **ANNUAL_SALARY**.
   The values of the column specified in the **Value** field are used to calculate the size of the bars in the chart.

12. In the **Group Function** list, choose **SUM**.
   A group function groups the Value column values by unique Label column values, and performs an operation on each group of values. In this case, the group function provides the total salary for each department.

**Table or View Columns**
Choose one or more table or view columns whose data you want to display in the chart.
Click on ![Link](/images/icons/link.png) to set link parameters.

<table>
<thead>
<tr>
<th>Label</th>
<th>DEPARTMENT_NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Link</td>
<td></td>
</tr>
<tr>
<td>Value</td>
<td>ANNUAL_SALARY</td>
</tr>
<tr>
<td>Group Function</td>
<td>SUM</td>
</tr>
</tbody>
</table>

13. Click **Finish** to accept the defaults for the remaining properties and display the Manage Component page.

14. On the Develop tab of the Manage Component page, click **Run**.
15. Close the browser window that contains the chart.
   If you wanted, you could now go back and edit the chart to make changes such as ordering the bars in the chart by the Label column rather than Value column, or add a customization form.

   **Note:** For more information about building charts, visit the Oracle Portal Online Help. In the Search field, enter chart, and click Go.

16. Click Close to return to the Navigator.

### 5.3 Controlling Access to an Application Component

Now that you have created your components, you need to allow other users to access and interact with them.

The salary information provided by the View Salary per Department chart you created is of a particularly sensitive nature. Only members of the HR department should be able to access that information, so let’s make sure only members of the HLW_HR group can run the chart.

1. If you are not already on the Navigator page, in the shortcut bar, click .
2. In the row for <YOURNAME>HRCHART, click the Grant Access action.
3. Clear the Inherit Privileges from Application check box.
Controlling Access to an Application Component

4. Click Apply.
5. Let's give the HLW_HR group privileges to run the chart.
   In the Grantee field, enter HLW_HR.
6. In the list next to the Grantee field, make sure Execute is chosen.

Grant Access
Enter the name of the user or group to which you want to grant privileges, or click on  to select a user, or click on  to select a group, then choose the level of privileges you want to grant, then click Add.

<table>
<thead>
<tr>
<th>Grantee</th>
<th>Type</th>
<th>Privilege</th>
</tr>
</thead>
<tbody>
<tr>
<td>HLW_HR</td>
<td>GROUP</td>
<td>Execute</td>
</tr>
<tr>
<td>SCOTT</td>
<td>USER</td>
<td>Manage</td>
</tr>
</tbody>
</table>

7. Click Add.

Change Access
Change the level of privileges that have been granted to a user or group, or click  to revoke privileges from a user or group.

8. Click Close to return to the Navigator.
5.4 Lesson Summary

Congratulations! You have created an application, and given users access to it. You now know how to:

- Create a form based on a table
- Create a report using the query wizard
- Create a chart using the query wizard
- Provide access to a component

For more advanced examples of what you can do with Oracle Portal application components, see the Oracle Portal 3.0.8 Building Portals manual.

For any other information about building application components, see the Oracle Portal Online Help.
This appendix shows you how to set up the tutorial environment and how to assign the appropriate privileges to users who are going through the tutorial. If a user does not already have a user account, you must create one.

**Note:** For information about how to create users, visit the Oracle Portal Online Help. In the **Search** field, enter ‘creating a user account’, and click **Go**.

To be able to complete the following set up tasks, you must be a portal administrator.

### A.1 Installing the Demo Schema, Content Area, and Application

The exercises within the tutorial make use of a demo schema, content area, and application. You can access the installation scripts for these demos at [http://technet.oracle.com/docs/products/iportal/doc_index.htm](http://technet.oracle.com/docs/products/iportal/doc_index.htm). To install these samples, follow the instructions in the Read Me file located in the same zip file as the installation scripts.

### A.2 Creating the HLW_EMPLOYEE User

In several of the tutorial exercises, users grant access privileges to a user called HLW_EMPLOYEE. For users to be able to complete these exercises, you must create this user.

1. On your Oracle Portal home page, click the **Administer** tab.
2. In the Users portlet, click **Create New Users**.
3. In the **User Name** field, enter **HLW_EMPLOYEE**.
4. In the **Password** field, enter **HLW**.
5. In the Confirm Password field, enter HLW.
6. Click Create.
7. Click Close.

A.3 Creating the HLW_HR Group

In several of the tutorial exercises, users grant access privileges to a group called HLW_HR. For users to be able to complete these exercises, you must create this group.

1. On your Oracle Portal home page, click the Administer tab.
2. In the Groups portlet, click Create New Groups.
3. In the Name field, enter HLW_HR.
4. Because this group is used only during the tutorial, it does not need to have any members, so click Finish.

A.4 Assigning a User as a Content Area Administrator of the Tutorial Content Area

To complete the exercises in Chapter 3, "Maintaining a Content Area", users must be assigned as content area administrators of the Healthy Living Tutorial content area.

1. On your Oracle Portal home page, click Content Areas.
2. If you are not already on the Content Areas tab of the Navigator, click Content Areas.
3. If you are not already at the root level, click Content Areas in the Path.
4. In the Healthy Living Tutorial row, click Edit Properties.
5. Click Access.
6. In the Grantee field, enter the user name of the user you want to assign as a Content Area Administrator.
7. In the list of privileges, make sure Administer is chosen.
8. Click Add.
9. Click OK.
A.5 Granting a User Manage Items Privileges on the For Our Employees Folder of the Tutorial Content Area

To complete the exercises in Chapter 4, "Adding Items to a Content Area", users must be granted Manage Items privileges on the For Our Employees folder of the Healthy Living Tutorial content area.

1. On your Oracle Portal home page, click .
2. If you are not already on the Content Areas tab of the Navigator, click Content Areas.
3. If you are not already at the root level, click Content Areas in the Path.
4. In the Healthy Living Tutorial row, click Contents.
5. Click Folders.
6. In the For Our Employees row, click Edit.
7. Click Access.
8. In the Name field, enter the user name of the user to whom you want to grant Manage Items privileges.
9. Click Add To Access List.
10. In the row for the user, select the Manage Items check box.
11. Click OK.

A.6 Granting a User Manage Privileges on the Tutorial Application

To complete the exercises in Chapter 5, "Building Application Components", users must have Manage privileges on the Tutorial Application.

1. On your Oracle Portal home page, click .
2. If you are not already on the Applications tab of the Navigator, click Applications.
3. If you are not already at the root level, click Applications in the Path.
4. In the TUTORIAL30_APPLICATION row, click Grant Access.
5. In the Grantee field, enter the user name of the user to whom you want to grant Execute privileges.
6. In the list of privileges, make sure Execute is chosen.
7. Click Add.
8. Click OK.
advanced search

Enables content area users to:

- Find content that contains *any or all* terms in the search string.
- Search another content area outside the current one, or search across all content areas.
- Restrict the search to a particular folder, category, perspective, item type, or attribute.

If *inter*Media is installed and enabled, advanced search can also be used to perform near, soundex, and fuzzy searches.

API

Application Program Interface. A software program that functions between the operating system and application or between a host application program and client applications.

API, overloaded

Comprised of more than one function or procedure that share same name, but contain differing numbers and/or types of parameters.

application

In Oracle Portal, a group of components connected to one another by links, designed to fulfill a particular business need. For example, a form can be linked a chart that, in turn, allows an end user to drill down to detailed reports about items displayed in the chart.
**application component item**
One of the item types you can add to a folder. An Oracle Portal application component item may be a chart, form, report, and so on, created by the Oracle Portal Component Build Wizard and stored in the host database. When the user clicks the item, the application component executes and sends the result to the user’s browser.

**activity log**
Database table that provides a record of end user requests for Oracle Portal components. The log includes information about the time of the request, the user who made the request, and the machine and browser type that originated the request.

**attribute**
Stores information about an item or folder: for example, Create Date, Expire Date, and Author. Content area administrators can create their own attributes to extend the functionality of item types and folder types.

**authorized user**
User who logs on to Oracle Portal. By default, authorized users can create certain Oracle Portal objects such as folders and pages. Contrast to public users, who cannot log on.

**banner**
A colored, horizontal bar with a title and optional graphic elements displayed on an Oracle Portal page or folder. A banner breaks up the visual flow of a page and helps group related items that appear beneath it.

A folder can contain up to four different types of banners: Main, Sub, Region, and Group By.

**base folder type**
See folder type.

**base item type**
See item type.

**basic search**
Enables content area users to search the current content area’s items, folders, categories, and perspectives for the search string.
**batch job**
Running a component in the background using the Oracle Portal batch job facility. An end user can run a component in batch mode by selecting options on the customization form for the component. Batch processing is useful if the component is based on a large amount of data, or if the component displays many rows of data.

**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. Oracle Portal component developers typically use bind variables to display a parameter entry field in a component's customization form. The entry field allows end users to choose the data that the component will display.

**bookmark**
See *favorite*.

**bulk load**
See *Zip file item*.

**caching**
Temporary storage of a page, folder, or component to reduce performance costs associated with retrieving the object each time it is requested. Users can choose to cache the structure of a page or folder, the structure plus the content, or nothing at all.

**calendar**
Oracle Portal component that displays the results of a SQL query in calendar format. At least one of the table columns in the query must have the DATE datatype.

**call interface**
Displays the arguments that were selected when a component was originally created or last edited.

**category**
A grouping of items in a content area. A category helps users answer the question, "What is this item?" For example, in a travel content area, you might have categories of maps, snapshots, or hotel reviews. Each item added to a content area must be assigned to a category.
chart
A component that displays the results of a SQL query as a bar 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.

cluster
Database object used to store tables that are related to one another and that are often joined together in the same area on disk.

color palette
Used to assign colors to elements in a folder style, including background, links, banners, and other items displayed on a folder page. The hex value for each color is displayed in the palette.

component
A PL/SQL stored procedure created by an Oracle Portal component build wizard; for example, a chart, report, or form. Executing the stored procedure creates the HTML code used to display the component.

container folder
A repository for related items including files, text, documents, images, application components, and so on. Contrast to PL/SQL, URL, and search folders.

content area
Collection of related information used to store content in Oracle Portal. A content area includes all the tools required to manage its content. Known as a site in WebDB 2.x and Oracle Portal 3.0 beta. Content areas contain a hierarchy of folders for organizing content.

Content Area Map
Displays the hierarchical organization of all folders in an Oracle Portal content area; allows users to access folders. The Content Area Map is tailored for each authorized user; only the folders you are authorized to view and/or edit are displayed.

content area administrator
User who has full privileges over the entire content area. Content area administrators set up and maintain the content area; designate folder owners and style administrators; create perspectives and categories; and manage users. Content
area administrators can also view all the folders on the content area, including any user's personal folder.

**content area log**
Table of all events and related information gathered as users interact with a content area. Used to generate statistics in the form of reports and graphs.

**content area page**
Page that establishes a common look and feel for every folder in a content area. May include such items as a standard navigation bar, a corporate logo, and so on. Controlled by the content area administrator.

**content contributor**
User who can add items to a content area folder; that is, one who has Own Item, Manage Item, View Item, or Create With Approval privileges. Item and folder owners control which users can add items to a given folder.

**cookie**
Used by the Login Server to store information about the identity of users attempting to log in to Oracle Portal or associated external and partner applications.

**custom folder type**
See **folder type**.

**custom item type**
See **item type**.

**customization form**
Page that prompts end users for values to pass to an Oracle Portal component. End users can view the customization form for a component, if one has been created, by clicking the Customization link.

**dashboard**
Set of buttons that appears at the top of the Category, Perspective, and Folder pages when displayed in Edit mode. Allows quick access to all the edit tools used to create and manage categories, perspectives, or folders.

**database access descriptor (DAD)**
Set of values that specifies how Oracle Portal connects to the Apache Listener to fulfill an HTTP request. The information in the DAD includes the user name (which
also specifies the schema and the privileges), the user password, and connect string parameters.

**database administrator (DBA)**
Oracle Portal user belonging to the DBA group. By default, members in the DBA group have access to all Oracle Portal product pages, and have the Manage privilege for pages, content areas, applications, and administration.

**database object**
See *object*.

**database user account**
See *schema*.

**direct access URLs**
Allows users to bypass standard Oracle Portal navigation and directly access pages, folders, categories, perspectives, and documents using a URL.

**directory**
See *portal directory*.

**display name**
An object’s external name used throughout Oracle Portal: in the Navigator, as well as on the page, folder, or component banner (unless it has been changed). When the object is published as a portlet, the display name is used as the title of the portlet in the Available Portlets list and in the portlet repository.

**Edit mode**
Mode that enables an authorized user who has logged on to a content area to manage folders and the items contained within the folders. To switch to Edit mode, the user clicks the Edit button at the top right of the folder page. If the Edit button does not appear, the user is not authorized to add items to the folder and/or to change the folder's properties.

**expiration period**
Number of days—or an exact date—on which an item expires. After an item expires, it is viewable only by the item’s owner and the content area administrator. Expired items are removed from the database during a system purge of all expired items.
export
Moves source data from an Oracle Portal schema to a target schema for later retrieval. For example, you may want to export data from your production database and import all or part of the data in that export file into your development database.

external application
Application external to Oracle Portal that is launched from the External Applications portlet. If you have registered your user name and password for an application with this portlet, the Login Server logs on to the application for you each time you launch it.

favorite
Item in the Favorites portlet that provides quick access to a frequently visited URL, either within Oracle Portal or externally. Each user who logs on to Oracle Portal has his or her own Favorites portlet.

file item
One of the item types you can add to a folder. When you add a file item, the file is uploaded to the content area and stored in the host database. When a user clicks the display name link, the file is downloaded to the user’s computer and displayed in the user’s Web browser.

folder
Repository for content within a content area. Oracle Portal supports four folder types: container, PL/SQL, URL, and search. Folders in a content area are similar to folders on a desktop computer in that they are organized hierarchically. Folders may be accessed through the Navigator and the Content Area Map.

folder link item
One of the item types you can add to a folder. A folder link provides a route to another folder within a content area. When the user clicks the display name link, the folder referenced by the item is displayed in the user’s browser.

folder owner
User responsible for managing the content (items) in a folder. May add, edit, or delete any item in the folder.

folder area
Area on the folder page where content items are displayed.
**folder path**
Chain of folder reference names separated by colons, starting at the root folder and ending at the object folder. Folder paths, which may appear on the folder page, describe the complete directory path of a folder and create URLs for use in folder links.

**folder type**
Defines the content of a folder and the information that is stored about a folder. Base folder types included with Oracle Portal are: container, PL/SQL, search, and URL. Custom folder types are folder types created by content area administrators to extend the functionality provided by base folder types, and store additional information about folders.

**form**
Component that provides an interface to one or more database tables, views, or procedures.

**frame driver**
Component consisting of a Web page divided into two frames. One frame (the driving frame) contains a SQL query that drives the contents of the second (target) frame.

**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.

End users can execute procedures or functions in a content area by clicking on the title of a PL/SQL or custom item.

**generate**
Saving a procedure containing an Oracle Portal component to a file or database in binary format so that it can be executed in run-time and batch mode.

**gist**
A generic interMedia Text gist is a summary consisting of the document paragraphs which best represent the overall subject matter. You can use the Generic Gist to skim the main content of the text, or assess your interest in the text’s subject matter.
grantee
User who is given privileges on an object by another user.

group
Collection of Oracle Portal users that typically shares 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 component) to several users at once.

group owner
User who has the privilege to add or delete members from the group, or to delete the group itself. Each group can have more than one owner.

hierarchy
Component 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
Within Oracle Portal, the page that is displayed upon logging on. The portal administrator chooses this page for public users; authorized users may choose their own.

HTML
Acronym for Hypertext Markup Language. A tag-based ASCII language used to specify the content, format, and links to other pages on Web servers on the Internet. Oracle Portal consists of a collection of PL/SQL procedures that, when executed, generate HTML.

HTTP function
See function.

image
Bitmap object that can be stored and loaded into a component or content area, and displayed using a Web browser. Oracle Portal supports images of type JPEG, GIF, or PNG.
**image/imagemap item**

One of the item types you can add to a folder. You can add a bitmap image or an imagemap item (collection of smaller images, each of which provides a link to a different URL).

**index**

Optional structure associated with a table used to locate rows of the table quickly, and (optionally) to guarantee that every row is unique.

**interest list**

Folder link(s) that an authorized user chooses to display in the Favorites portlet for quick and easy access.

**InterMedia Text**

Advanced gist, theme, and text retrieval services offered in Oracle 8i that enable search criteria to be compared against every word in every item within a content area. When InterMedia is not available, or has not been enabled, search criteria is compared to each titles, descriptions, and keywords only.

**item**

Basic unit of content (such as text, files, and folder links) placed in a content area folder. Items are stored in the content area’s host database. The item’s display name and its content (or results of execution, in the case of a link or function call) are displayed on automatically-generated Web pages by Oracle Portal. Each item must be defined as one of the base item types (or custom item types, if they have been created), so that Oracle Portal knows how to display and execute it.

**item ID**

Local database reference to the contents 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 contents of the item.

**item level security (ILS)**

Mechanism which allows controlled and granular access to specific items in a given folder. ILS authorizes item owners to grant explicit item access to user(s) and group(s) who would otherwise not be authorized.

**item type**

Define the contents of an item and the information that is stored about an item. Base item types included with Oracle Portal are: File, Folder Link, Image, Java
Application, PL/SQL, Text, URL, Application Component, and Zip File. Custom item types are item types created by content area administrators to extend the functionality provided by base item types, and store additional information about items.

**item version control**
See *version control*.

**JavaScript**
Scripting language developed by Netscape that allows generation of dynamic components in otherwise static HTML. Oracle 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.

**library**
Collection of one or more PL/SQL program units stored together in a database, and can be referenced by several applications at once.

**link**
Component that allows developers to add hypertext jumps between components.

**link text**
Text (usually displayed in color) which is "hot", or hypertext. End users click on the text to display the Web page specified in the HTML code. For example, in the HTML code `<a href="http://www.traveltheworld.com">Travel The World</a>`, 'Travel The World' is the link text displayed in color. End users click it to jump to the www.traveltheworld.com Web site.

**List of Values (LOV)**
Component that allows developers to add selectable values to entry fields in components and customization forms. An end user selects from the list one or more values for the entry field. A single List of Values can be displayed in different formats such as combo boxes, radio buttons, or check boxes.

**local node**
Instance of Oracle Portal to which a user is logged on. Each node has its own portlet repository that can provide portlets for other instances of Oracle Portal. Contrast with *remote node*.
**lock**
Setting automatically applied to a component when it is being edited. The setting prevents other users from editing the component.

**Login Server**
When set up to run with Oracle Portal, provides a Single Sign-On (SSO) mechanism that enables an Oracle Portal user to log in securely to Oracle Portal, and any partner and external applications, using a single user name and password.

**master-detail form**
Component 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.

**menu**
Component that displays a Web page containing options that end users can click to navigate to other menus, Oracle Portal components, or URLs.

**mod_plsql gateway**
Provides support for building and deploying PL/SQL-based applications on the Web, such as Oracle Portal. PL/SQL procedures stored in the database can retrieve data from database tables and generate HTTP responses containing formatted data and HTML code to display in a Web browser.

**navigation bar**
In a content area, the area that allows users to navigate to frequently accessed or important areas. In framed browsers, the navigation bar appears on the left side of each folder page; in unframed browsers, it appears at the top of the page. While folder owners decide which text links or images to place on the navigation bar for a given folder, the content area administrator has control over certain elements of the navigation bar, such as which image is used as the site logo, and the text of the links themselves.

**Navigator**
Mechanism for locating and interacting with Oracle Portal objects, automatically customized for each user’s authorization level. Provides a Find field for locating objects quickly.
object
1) An Oracle Portal structure used to store data in the database. Developers can create objects such as folders, components, pages, styles, and so on using wizards provided by Oracle Portal.

2) Database objects such as tables, procedures, Java objects, etc. These objects can also be created using Oracle Portal wizards or Oracle database commands.

Oracle connect string
Gateway setting that can be used to set up a TNS names alias for a remote database installed on Windows NT.

Oracle home
Environment variable that indicates the root directory of Oracle products.

package
Database object consisting of a specification and a body. The specification includes the datatypes and subprograms that can be referenced by other program units. The body includes the actual implementation of the package.

page
Object created in Oracle Portal containing portlets. Each time you display a page, it is dynamically assembled and formatted according to the portlets and layout chosen for that page.

page layout
Defines how many regions appear on a page and how they are organized.

page style
See style.

parameter entry field
Field on a customization form that allows end users to enter values that will be passed to an Oracle Portal component.

parent-child relationship
See recursive relationship.
**partner application**
Application that has delegated its authentication to the Login Server. If registered with the Login Server, users can log into a partner applications using the Single Sign-On mechanism.

**personal folder**
Area within Oracle Portal in which authorized users can store and share personal items. The portal administrator can choose to create a personal folder for a user when creating a Single Sign-On user account.

**perspective**
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'. Perspectives are optional, and more than one can be assigned to an item.

**PL/SQL item**
One of the item types you can add to a folder. A PL/SQL item contains a block of PL/SQL code. When a user clicks the item’s display name link, the block is executed. The result is returned and displayed in the user's browser.

**PL/SQL folder**
One of the four folder types supported by Oracle Portal. PL/SQL folders contain PL/SQL code which generates HTML when the folder is rendered. Contrast with container, search, and URL folders.

**PL/SQL function**
See function.

**portal**
Set of information--content areas, pages, applications, even data from outside sources--brought together in one central location and accessed through a common interface, called a page.

**portal administrator**
Outside of the DBA, users with the highest level of privileges in Oracle Portal. Portal administrators can view and modify anything in Oracle Portal, even folders, pages, and applications marked private. (The only exception is groups: although
portal administrators can modify the PORTAL_ADMINISTRATORS and PORTAL_PUBLISHERS groups, they cannot modify any other group unless they have been named group owner.

**portal directory**
Lists information about Oracle Portal users, which other users can access. The portal administrator decides whether a user is included in the directory. Each user can specify whether to include personal information, such as home contact information, in the directory.

**portlet**
Re-usable information component that summarizes or provides access to an information source. Portlets are the fundamental building blocks of an Oracle Portal page.

**portlet provider**
Product (for example, iSyndicate or Oracle Portal itself) that manages portlets and provides special services, such as stock quotes, local news, and weather. Portlet providers provide code to registered partners that, when executed, downloads content to the partner’s portal page. Partners can embed this code in their HTML to create content for an Oracle Portal portlet.

**portlet publisher**
User who can publish objects (folders, pages, components, and so on) as portlets so they can be included on pages.

**portlet repository**
Content area created by Oracle Portal containing all the portlets available on the local node and any registered remote nodes. When you register a new provider on your local node, or when you register remote nodes and perform a refresh, the providers and their portlets are automatically added to your portlet repository. In addition, as soon as an object in a content area is published to the portal, that content area (and the object) appear in the repository.

**primary key**
Column in a database table consisting of unique values that can be used to identify rows in a table.
privilege
The right to perform an action within Oracle Portal. Privileges are either global (set through the Users or Groups portlets) or specific to particular objects (usually set through the object’s Access tab). When building applications, access also can be granted to database objects, shared components, components and applications.

procedure
PL/SQL subprogram that performs a specified sequence of actions.

profile
System and Oracle database resources that are available to the user.

property sheet
Displays item attributes or folder properties without having to access the Item Manager or Folder Manager.

provider
See portlet provider.

provider record
Record returned by a portlet provider containing specified information about a portlet.

proxy server
Server that provides access to files from other servers by retrieving them either from the local cache or from the remote server.

public folder
Any folder in a content area that is viewable by public users, who do not log on. The folder owner or content area administrator must explicitly designate a folder as public.

public user
User who can access but is not logged on to Oracle Portal. When users first access Oracle Portal they do so as public users, whether or not they have the ability to log on. A public user can view any content area folder that has been marked as public, but cannot edit any content.
purge
See system purge.

query
SQL SELECT statement that specifies which data to retrieve from one or more tables or views in a database.

Query by Example (QBE) report
Component that provides an interface allowing end users to query or insert values into a database table or view. The Query by Example report contains entry fields that correspond to the columns in the database table or view on which the form is built.

recent object
Oracle Portlet object recently displayed or edited. Each user has his or her own Recent Objects portlet, which provides links to the last n objects accessed.

recursive relationship
Relationship that occurs when the values in a table column can be related to those in another column in the same table or another table; for example, between a primary key and foreign key.

reference path
Path that uniquely identifies a portlet instance on a page. A reference path can be used to target parameters to individual portlets, or groups of portlets, on a given page.

region
Area within a page. Each region has its own specifications regarding how portlets placed within it are displayed (as rows or columns), how wide the region is relative to other regions in the row, and so on.

remote database
Database running on a separate machine that can be accessed over the network through a connect string or database link.

remote node
Any instance of Oracle Portal other than the one you are currently logged on to (known as the local node).
report
Oracle Portal component that displays the results of a SQL query in a tabular format.

role
Group of Oracle database users to whom database object privileges can be granted and revoked as a unit. A Database Administrator assigns database users roles in order to grant them Oracle database object privileges associated with the role.

rollover image
Second image that is displayed whenever the cursor is moved over an image on the navigation bar in a Oracle Portal content area, or on a tab on an Oracle Portal page.

root folder
Top level of the folder hierarchy in a content area; contains all other folders in the content area. Also known as the content area’s home page.

row
Set of values in a table; for example, the values representing one employee in the SCOTT.EMP table.

schema
Collection of components and database objects under the control of a given database user.

search folder
Folder based on an Oracle Portal content area search which creates different views of the content for different audiences. For example, you can create a search folder for all items belonging to the same category. Search folders are dynamic and are updated each time the folder is rendered. Contrast to container, PL/SQL and URL folders.

sequence
Database object used to automatically generate numbers for table rows.

session
Uninterrupted connection between a browser and Oracle Portal, from initial access to log off or disconnect. A session established as a public session at initial access becomes an authenticated session upon login.
**shared components**

Building blocks used by Oracle Portal developers to create components. Shared components include JavaScripts, color, font, and image definitions. Each shared component can be used by multiple developers to create Oracle Portal components.

**shared objects**

Content area created by Oracle Portal which contains objects such as personal folders, shared perspectives, shared categories, and shared custom types (shared attributes, shared item types and shared folder types). These objects can be shared across all content areas.

**Single Sign-On**

See *Login Server*.

**site**

See *content area*.

**snapshot**

Table that contains the results of a query on one or more tables, called master tables, in a remote database.

**snapshot log**

Table associated with the master table of a snapshot tracking changes to the master table.

**status code**

See *version*.

**stored procedure**

See *procedure*.

**structured U/I template**

Shared component that controls the look and feel of Oracle Portal components. Structured U/I templates display the same image and text in the same location on every component that uses the template.

**style**

Set of values and parameters that controls the appearance of Oracle Portal folders and pages. Styles applied to folders can control the look and feel of all the folders in
a content area, or they can be applied to a single folder. Page styles are always applied on a page-by-page basis. Styles created by the Style Manager in the content area can be applied to folders, banners, and navigation bars; page styles are applied only to pages.

**style administrator**
User who has special privileges to maintain and enforce display settings in a given page or folder style.

**subfolder**
A nested folder. All folders in a content area are subfolders of the content area’s home page, also known as the root folder.

**substitution tag**
Tag used to create unstructured U/I templates. When the HTML code that creates the template executes, substitution tags dynamically embed components, titles, headings, and other elements into the template.

**synonym**
Name assigned to a table or view that can thereafter be used to refer to it.

**system purge**
Deletes all items in a content area marked as deleted or expired from the database. System purges are performed by the content area or portal administrator.

**table**
Basic storage structure in a relational database.

**tablespace**
Allocation of space in the database that can contain objects.

**temporary tablespace**
Allocation of space in the database used for the creation of temporary table segments for operations such as sorting table rows.

**text item**
One of the item types you can add to a folder. When you create a text item, you enter text (up to 32KB) in the Item Wizard. The text block is then stored in the content area’s host database. When a user clicks the display name link, the text is displayed in the user’s Web browser.
theme
An interMedia text theme is a snapshot that describes what the document is about. Rather than searching for documents that contain specific words or phrases, users can search for documents that are about a certain subject, even if that subject is not mentioned explicitly in the document. Theme queries return a list of documents that are about the requested subject, along with a score that indicates how strongly each document refers to the subject in question.

title
See display name.

translation
Content area rendered in another language. When a content area administrator creates a translation, content contributors can add content in that language. Content area users can also view the content by setting their browser language appropriately.

trigger
Database object associated with a table. It executes before or after one or more specified events.

unstructured U/I template
Shared component that controls the look and feel of Oracle Portal components. Unstructured U/I templates are based on HTML code that, when executed, dynamically embeds components, titles, headings, and other elements.

URL folder
Folder providing a route to another Web page, either inside or outside this content area. When a user clicks the folder link, the Web page referenced by the link is displayed. Contrast to container, PL/SQL, and search folders.

URL item
One of the item types you can add to a folder. URL items provides a route to another Web page, either inside or outside this content area. When a user clicks the item’s display name link, the Web page referenced by the link is displayed.

user interface (U/I) template
Shared component that controls the look and feel of Oracle Portal components. Selecting a U/I template when building a component automatically selects a title on
the page where the component is displayed, a title background, links to other web
pages, and background colors and images.

**version**
Indicates the status of a stored procedure that contains a Oracle Portal component.
For example, ARCHIVE indicates an old version of the component that is being
saved in the database. PRODUCTION with VALID PACKAGE indicates the most
recent version of the component, which will run without errors. PRODUCTION
with INVALID PACKAGE indicates that the most recent version of the component
contains errors. There can be multiple versions of the same component.

**version control**
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.

**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**
Usual mode of viewing and interacting with an Oracle Portal content area. Contrast
to *Edit mode*, which is used to perform folder and item management tasks.

**visited link**
Link which is displayed in a different color than unvisited links to signify that the
user has clicked it at least once during the browser session.

**Web server**
Program that delivers Web pages.

**wildcard**
In Oracle Portal, the percent (%) character, which is used to mean any single
character or a contiguous set of characters within a word or phase.

**wizard**
Graphical interface that guides a user step by step through a process. In Oracle
Portal, there are wizards for creating applications, components, database objects
pages, content areas, folders, and items within folders.
Zip file item

Method for uploading many files in one operation. May be used to replicate a file system or Web site. A folder is created for each directory and an item is created for each file. The items are contained in a target folder in the chosen content area.
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