Oracle® Portal

Tutorial

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Oracle Portal Tutorial, Release 3.0

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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.

This preface includes the following sections:

Section	Location
"Intended Audience"	Page ix
"Prerequisites"	Page x
"Tutorial Scenario"	Page x
"Structure"	Page xi
"Related Documents"	Page xi
"Conventions"	Page xii

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 Building Advanced 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. 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:

- An user name and password to log on to Oracle Portal.

- The URL of the Oracle Portal home page.

For information about installing and configuring Oracle Portal, see the *Oracle Portal Installation and Configuration Guide*.

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 want an application that enables them 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.

Structure

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.

Chapter/Appendix	Contains	Read this if you are
Chapter 1, "Learning the Basics"	Lessons on how to start Oracle Portal and how to navigate through the product.	Any user
Chapter 2, "Designing a Portal"	Lessons on how to create a page: the front-end of a portal.	Responsible for building your company's portals (a portal administrator)
Chapter 3, "Maintaining a Content Area"	Lessons on how to set up a content area or a folder.	Responsible for maintaining a content area or a folder within a content area (a content area administrator or folder owner)
Chapter 4, "Adding Items to a Content Area"	Lessons on how to add content to a content area.	Responsible for adding content to a content area (a content contributor)
Chapter 5, "Building Application Components"	Lessons on how to build applications.	Responsible for building your company's applications (a portal developer)
Appendix A, "Setting Up the Tutorial"	Instructions on how to set up this tutorial.	Responsible for setting up users for the tutorial

Related Documents

For more information, see the following manuals:

- *Oracle Portal Installation and Configuration Guide*
- *Oracle Portal Building Advanced Portals*

The *Oracle Portal Quick Tour* (available in the online help system or at http://technet.oracle.com) provides an overview of the product.

The Oracle Technology Network (http://technet.oracle.com) also provides many additional articles and white papers.

Conventions

The following conventions are also used in this manual:

Convention	Meaning
bold text	Bold text indicates a term defined in the text, the glossary, or in both locations.
	Bold text also indicates button names, labels, links, and other user interface elements.
`monospace text`	Monospace text indicates text that you need to enter.
italic text	Italic text is used for emphasis, and to indicate a cross-reference to another manual.
< >	Angle brackets enclose user-supplied names. Substitute an appropriate value.

1

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.

This chapter includes the following sections:

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.

For a graphical introduction to Oracle Portal, visit the *Oracle Portal Quick Tour* in the online help system, or at http://technet.oracle.com.

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.

    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**.

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.

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.

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 using the Navigator. For information about using the Navigator, see Section 1.5, "Using the Navigator" on page 1-9.

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.

- 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 DBAdminister 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 provides access to the content area building tools.

Add Content Quickly and Easily

Content Areas

Create a New Content Area
Use a one-step wizard to create a new content area. Content areas hold self-published information in the form of folders and items. Use portal pages to link one or more content areas together for better organization and centralized access.

Edit Content Area
Select from a list of existing content areas, or type in the name of one you know. Go directly to the content area, or choose one of the actions that appear below.

Name [   ] 🗐 Navigate

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.

my Links

Favorites   Customize

Oracle

Oracle Portal Help

Oracle Technology Network

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 1-9.

- 🔒 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 (?) 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 [?] 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 (?) 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**.

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 *inter*Media Text is installed and enabled, and an *inter*Media 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**.

Categories
Page Tasks   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
Portal Admin   Go

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 ⊞ .

2. Click ❓ to open the field-level help topic in a new browser window.

Pages

Related topics

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, filed under the first letter of the page creator's user ID.

This page contains the following:

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

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. 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 Content Areas 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.

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

For any other information about the basics of Oracle Portal, see the *Oracle Portal online help.*

2

Designing a Portal

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 page creation 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:

Section	Location
Section 2.1, "Before You Begin"	Page 2-1
Section 2.2, "Creating a Page"	Page 2-2
Section 2.3, "Adding a Portlet to a Page"	Page 2-3
Section 2.4, "Providing Access to a Page"	Page 2-9
Section 2.5, "Lesson Summary"	Page 2-11

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.

Name	scotthealthyliving
Display Name	Scott's Healthy Living Page
Description	

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.

10. Click **Finish**.

You 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 Page**.

   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 ⊞ .
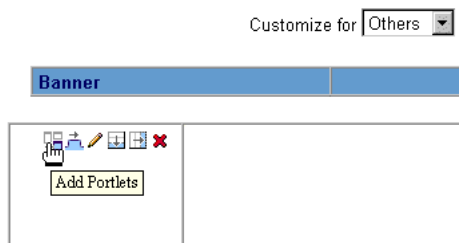
4. In the **View By** list, make sure **Provider** is chosen.

5. Under the HLW provider, click ▶ next to the **For Our Employees** folder.
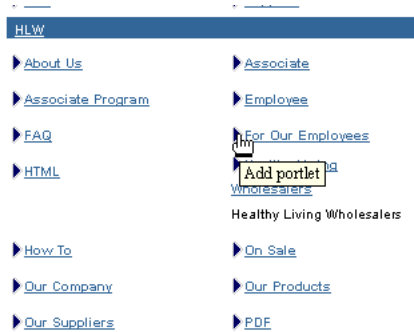
6. Click **OK**.

7. 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.

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 Page**.

2. In the **Customize for** list, make sure **Others** is chosen.

3. In the right region, click 🖳 .
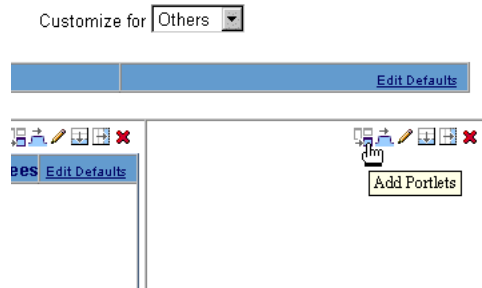
4. Under the TUTORIAL30_APPLICATION provider, click ▶ next to the **TUTORIAL_HRREPORT** (View Employees by Department) report.
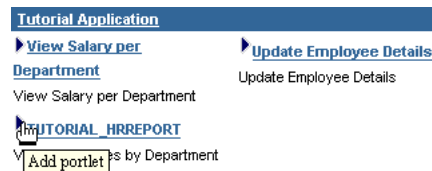
5. Click **OK**.

6. 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 Page**.

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 ▶ .

   Under the Oracle Portal provider, click **Favorites**.
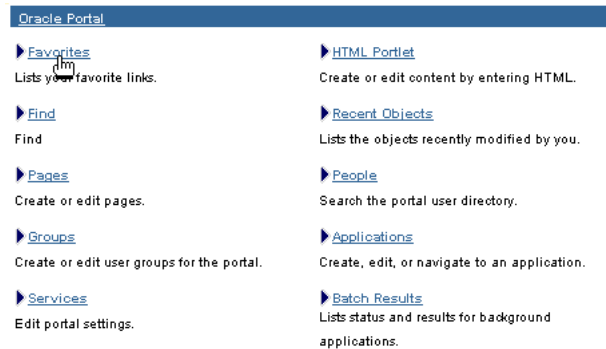
5. The portlet looks good, so click **Add Portlet**.
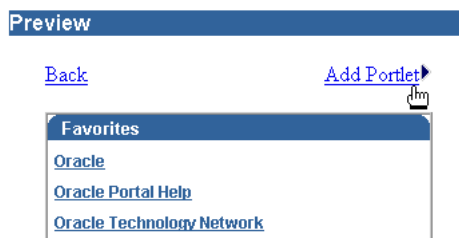
6. Click **OK**.

7. 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 Page**.

2. Click the **Access** tab.

3. Make sure the **Display Page To Public Users** check box is selected.

Expose 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 Portlets 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 [icon] to select a user, or click on [icon] to select a group, then choose the level of privileges you want to grant, then click Add.

Grantee | HLW_EMPLOYEE | [icon] [icon] | Edit Contents | ▼ | Add

3. 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.

	Grantee	Type	Privilege
✖	HLW_EMPLOYEE	USER	Edit Contents ▼
✖	SCOTT	USER	Manage ▼

Here, you can also remove users by clicking ✖ 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 full control 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)**.

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_HR   🗐 🔯   Customization(Add-only) ▼   Add

3. 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.

	Grantee	Type	Privilege
✖	HLW_EMPLOYEE	USER	Edit Contents ▼
✖	HLW_HR	GROUP	Customization(Add-only) ▼
✖	SCOTT	USER	Manage ▼

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 Building Advanced Portals* manual.

For any other information about building pages, see the *Oracle Portal online help.*

3

Maintaining a Content Area

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:

Section	Location
Section 3.1, "Before You Begin"	Page 3-2
Section 3.2, "Creating a Folder"	Page 3-3
Section 3.3, "Creating a Category (Content Area Administrators Only)"	Page 3-5
Section 3.4, "Creating a Perspective (Content Area Administrators Only)"	Page 3-6
Section 3.5, "Creating a Style and Applying it to a Content Area"	Page 3-7
Section 3.6, "Creating a Navigation Bar and Applying it to a Content Area"	Page 3-12
Section 3.7, "Controlling Access to Your Content Area"	Page 3-16
Section 3.8, "Lesson Summary"	Page 3-20

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

3.2 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   .

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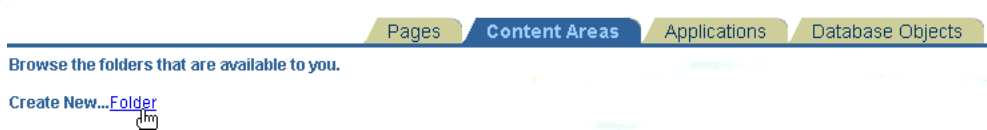
> **Note:** If you cannot see the **Folder** link, you are probably not a content area administrator of the Healthy Living Tutorial content area. Ask your portal administrator to assign you as a content area administrator. Instructions for doing this are provided in Section A.4, "Assigning a User as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

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

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.

Folder Properties

Enter a name for the folder which is used internally and a display name which
appears on the Navigator and throughout the product. The name should not contain
spaces or special characters. Choose a category for this folder.

Parent folder	Healthy Living Tutorial
Name	scottassociate
Display Name	Scott's Associate Program
Category	General

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`.

Category Properties

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

Parent Category	\<None\>
Name	scottfaq
Display Name	Scott'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 the 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.

Parent Perspective   <None>

Name   scottassociate

Display Name   Scott's Associate

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 Content Area

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**.

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**.

| Pages | Content Areas | Applications | Database Objects |

Browse the styles that you have created, as well as those you are authorized to use for your folders.

Create New... Style
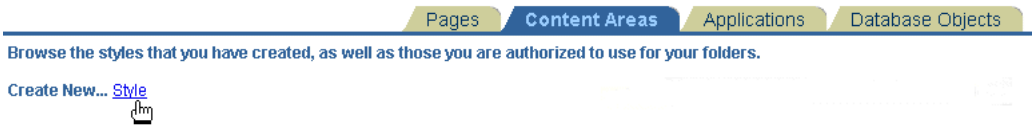
3. In the **Name** field, enter `<YourName>hlwstyle`.

4. In the **Display Name** field, enter `<YourName>`'s HLW Style.

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

Style Properties

Enter a name and display name. The name is use internally only, and should not containt spaces or special characters. The display name is displayed to the users. You can copy an existing style and use it as a basis for your new style. Choose whether to make this style available only to you or all authorized users.

Name	scotthlwstyle
Display Name	Scott's HLW Style
Copy From	Main Site Style
	☐ Make Public

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 were designing a style from scratch, you could choose a color from the color palette with your cursor.

   ## Style Element

   | Main Banner Color | ▼ |
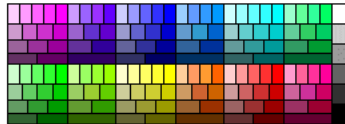
   Color #000066

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.

Style Element	Color
Sub Banner	#000066
Sub Banner Color	#6699CC
Sub Banner Link	#000066
Region Banner	#000066
Region Banner Color	#6699CC
Group By Banner	#000066
Group By Banner Color	#6699CC
Group By Banner Link	#000066
Item Display Name Link/Navigation Bar Link	#000066
Item Display Name Text/Navigation Bar Label	#000066

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:
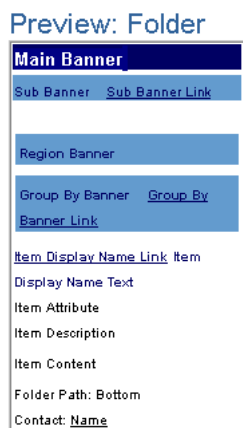
6. Click **OK**.

   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 content area

To associate the new style with all the folders in your content area, you need to apply it to the content area's root folder.

1. In the **Path**, click **Content Areas**.

2. In the Healthy Living Tutorial row, click **Edit Root Folder**.

3. Click the **Style** tab.

4. 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.

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.
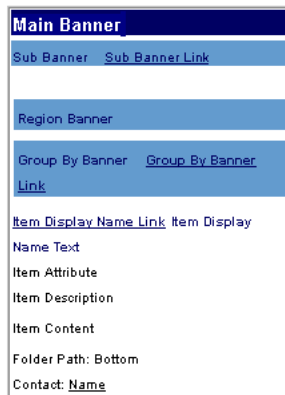
5. Click **Apply**.

6. Click **OK**.

7. Click **Healthy Living Tutorial**.

   Because you applied the new style to the root folder, it is applied to every folder in the content area, unless you explicitly apply a different style to a particular folder.

   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.

8. For the purposes of this tutorial, you need to set the style back to the default.

   a. Click your browser's Back button.

   b. In the Healthy Living Tutorial row, click **Edit Root Folder**.

   c. Click **Style**.

   d. In the **Select Style** list, choose **Healthy Living Tutorial**.

   e. Click **OK**.

3.6 Creating a Navigation Bar and Applying it to a Content Area

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 Healthy Living Tutorial row, click **Contents**.

2. Click **Navigation Bars**.

You can see the default navigation bar that already exists for your content area.

3. Click **Navigation Bar**.
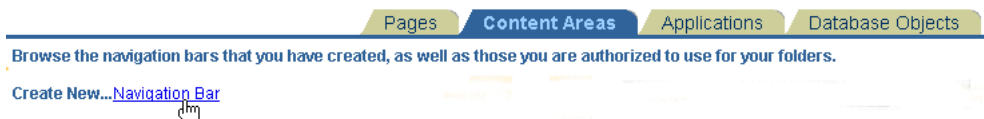
4. In the **Name** field, enter `<YourName>hlwnavbar`.

5. In the **Display Name** field, enter `<YourName>'s HLW Navigation Bar`.

6. In the **Style** list, choose **Healthy Living Tutorial Navbar Style**.

Navigation Bar Properties

Enter a name, which is used internally, and a display name, which appears on the Navigator and throughout the product. Choose a style to define the look of your navigation bar (e.g., background color and text color). Choose an alignment setting to position the elements of the navigation bar. In Copy From, you can optionally choose another navigation bar to use as the basis for your own bar. After you create your navigation bar, you can edit it by clicking the link that appears at the top of the page.

Name	scotthlwnavbar
Display Name	Scott's HLW Navigation Bar
Style	Healthy Living Tutorial Navbar Style
Alignment	Left
Copy From	<None>

7. Click **Create**.

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

Choose the kind of element that you would like to add to your navigation bar.

Element Type | Basic Elements ▼ |

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.

Selected

| Basic Search |
| Content Area Map |
| Log On/Log Off Link |
| Administration Link |
| Portal Home |
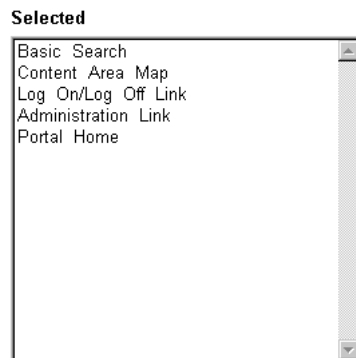
9. Click **Finish**.

   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 content area

To associate the new navigation bar with all the folders in your content area, you need to apply it to the content area's root folder.

1. In the **Path** click **Content Areas**.

2. In the Healthy Living Tutorial row, click **Edit Root Folder**.

3. Click the **Nav Bar** tab.

4. Select the **Select A Navigation Bar** radio button.

5. In the list of navigation bars, chose **<YourName>'s HLW Navigation Bar**.

6. Click **Apply**.

    The page refreshes. Here, you can edit the navigation bar.

7. Click **OK**.

8. Click **Healthy Living Tutorial**.

    Because you applied the new navigation bar to the root folder, it is applied to every folder in the content area, unless you explicitly apply a different navigation bar to a particular folder.

9. For the purposes of this tutorial, you need to set the navigation bar back to the default.

    a. Click your browser's Back button.

    b. In the Healthy Living Tutorial row, click **Edit Root Folder**.

    c. Click **Navbar**.

    d. Select the **Use Default (Healthy Living Tutorial)** radio button.

    e. Click **OK**.

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 only in public folders. 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:

With the following privileges:	Users can:
Own Folder	Perform all folder tasks, including granting folder privileges to other users.
	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.
	The content area administrator automatically has Own Folder privileges on every folder in the content area.
View Content	View any item in the folder.
Edit Style	Make changes to the folder's style.

With the following privileges:	Users can:
Manage Items	Add, edit, and delete items in the folder.
	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.
Create With Approval	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.

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 Healthy Living Tutorial row, click **Contents**.

2. Click **Folders**.

3. In the <YourName>'s Associate Program row, click **Edit**.

4. Click the **Access** tab.

5. Select the **Make Public** check box.

Access Settings
Select Make Public to display this folder to all users, even those who are not loggged 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

6. Click **Apply**.

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

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. Click next to the **Name** field.

2. In the Search window, click **HLW_EMPLOYEE (USER)**.

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.

Name HLW_EMPLOYEE (USER)   Add To Access List

3. Click **Add To Access List**.

4. Select the **Manage Items** 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.

Grantee Name	Grantee Type	Own Folder	View Content	Edit Style	Manage Items	Create With Approval
✖ HLW_EMPLOYEE	USER	☐	☑	☐	☑	☐
SCOTT	USER	☑	☑	☑	☑	☐

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

5. 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 items before they become available to other users.

1. Click ![icon] next to the **Name** field.

2. In the Search window, click **HLW_HR (GROUP)**.

Grant Access

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

Name	HLW_HR (GROUP)	![icon] ![icon]	Add To Access List

3. Click **Add to Access List**.

4. 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.

	Grantee Name	Grantee Type	Own Folder	View Content	Edit Style	Manage Items	Create With Approval
✖	HLW_EMPLOYEE	USER	☐	☑	☐	☑	☐
✖	HLW_HR	GROUP	☐	☑	☐	☐	☑
	SCOTT	USER	☑	☑	☑	☑	☐

5. Click **Apply**.

6. 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 has approved 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

- 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.*

4

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 though 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:

Section	Location
Section 4.1, "Before You Begin"	Page 4-1
Section 4.2, "Adding Items to a Folder"	Page 4-2
Section 4.3, "Editing an Item"	Page 4-11
Section 4.4, "Lesson Summary"	Page 4-12

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:

To:	Add an item of the following type:
Upload a file (for example, a document or an image).	File
Link to another folder.	Folder Link
Display an image that can also contain links to different URLs.	Image
Upload a Java Server Page (JSP) application as a JAR file.	Java Application
Execute a PL/SQL procedure.	PL/SQL
Display plain text.	Text
Link to another Web page or site.	URL
Display a Oracle Portal component (for example, a form or report).	Oracle Portal Component
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.	Zip File

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 ![icon] .

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**.

Folder: For Our Employees ◁ **View folder**
🗐 **Add item** | 🕸 **Administration**
📁 **For Our Employees** ▌ ?
(Last Updated: 10-OCT-2000) 💬
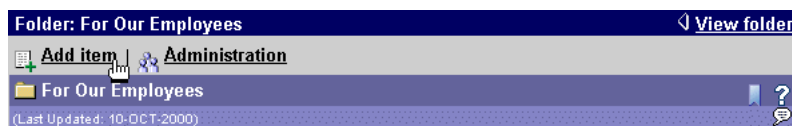
8. In the **Item Type** list, choose **URL**.

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

Item Type | 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.

11. In the **URL** field, enter `http://www.cnn.com/`.

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**.

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

Enter the URL to be displayed 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.

URL	http://www.cnn.com/
Display Name	Scott's News from CNN
Category	General ▼

14. Click **Finish**.

Folder: For Our Employees ◁ **View folder**
🗐 **Add item** | 🛠 **Administration**
📁 **For Our Employees** 🔖 **?**
(Last Updated: 13-OCT-2000) 💬

➕🖉🗑✖➕📰 Scott's News from CNN

Healthy Living Tutorial : For Our Employees

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 Type   Text

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 `<Name> Sign up for the Corporate Picnic!`.

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

Enter the text to be displayed 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.

Text

```
This week, sign up for the annual
corporate picnic in the lobby. This
year's picnic promises 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!
```

Display Name `Scott Sign up for the Corporate Picnic!`

Category `General`

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 `7` Days
- ○ Expires On `            ` (DD-MON-YYYY)

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.

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.

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.

                          Item Type | Application Component ▼ |

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.

Application Component | TUTORIAL30_APPLICATION: TUTORIAL_HRREPORT ▼ |

Display Name | Scott View Employees by Department |

Category | General ▼ |

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**.

11. Click **Finish**.

4.3 Editing an Item

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

Scott's News from CNN

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 **<YourName> News from CNN**.

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 **Secondary**.

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.

Basic Search Keywords [event]

8. Click **OK**.

9. Let's test this keyword.

    In the navigation bar **Search** field, enter `event`.

    Search
    [event]   Go

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

For more information about adding items, see the *Oracle Portal online help.*

5

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 though 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:

Section	Location
Section 5.1, "Before You Begin"	Page 5-1
Section 5.2, "Creating an Application Component"	Page 5-2
Section 5.3, "Controlling Access to an Application Component"	Page 5-21
Section 5.4, "Lesson Summary"	Page 5-23

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:

Component	Description
Forms	Provide an interface to one or more database tables, views, or procedures.
Reports	Display the results of a SQL query in tabular format.
Charts	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.
Calendars	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.
Dynamic Pages	Display dynamic database data based on SQL or PL/SQL which is executed every time the page is requested.
Hierarchies	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.
Menus	Display Web pages containing options that users can click to navigate to other components, URLs, or other menus.
Frame Drivers	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).
Links	Provide hypertext links that enable users to navigate between components.
Lists of Values	Provide selectable parameters for fields in components. Lists of Values can be displayed in formats such as combo boxes or radio buttons.

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.

    ■ **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.

Name	scotthrform
Display Name	Scott Update Employee Details
Application	TUTORIAL30_APPLICATION

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 or View	HLWPORTAL_DEMO.HLW_STAFF

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. Click **Run**.

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. In 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:

- INSERT_TOP

- DELETE_TOP

- INSERT_BOTTOM

- DELETE_BOTTOM

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:

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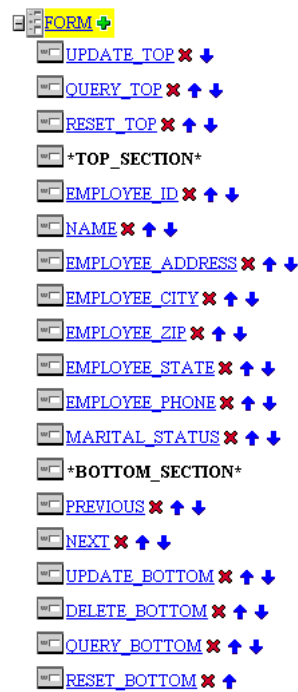
21. The wizard has defaulted the field labels based on the column names. In most cases we want to change these labels to something more meaningful, or format them to include spaces.

In the left frame, click **EMPLOYEE_ID**.

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

23. Change the rest of the field labels as follows:

Old field label	New field label
Name	Full Name
Employeeaddress	Address
Employeecity	City
Employeezip	Zip Code
Employeestate	State
Employeephone	Phone No
Maritalstatus	Marital Status

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 ♦ 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**.

26. Clear the **Begin On New Line** check box.

Layout Options

☐ Begin On New Line

Row Span   1

Col Span   1

You can also change other field properties. For example, you might want to change the **Input Width** of the Address field to 20 to allow users more space to enter the address.

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**.

Form Level Options

Box Background Color   Blue, Light

Box Background Image

Box Border   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.
```

Form Text

Enter descriptive text that you want to appear on the top or bottom of the form. You can add a form title and help text for the form. You can also choose a template that controls the look and feel of the page on which the form appears.

Template   PUBLIC.FINANCE_TEMPLATE1   Preview Template

Display Name   Scott Update Employee Details

Header Text
```
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. In 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. Click **Report**.

2. You can build the following types of reports:

- **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**.

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

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

5. 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.

Name	scotthrreport
Display Name	Scott View Employee by Department
Application	TUTORIAL30_APPLICATION

6. Click **Next**.

7. 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`.

8. Click **Add**.

9. 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`.

10. Click **Add**.

Tables and Views

Choose one or more tables or views on which to base your report, then click **Add**. The tables and views that you can choose in this step are accessible from the application you selected in the previous step.

Tables or Views `HLWPORTAL_DEMO.HLW_STAFF` 📋 Add

Selected Tables/Views

✖ HLWPORTAL_DEMO.HLW_DEPARTMENTS
✖ HLWPORTAL_DEMO.HLW_STAFF

11. 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**.

12. 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**.

13. 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.

Column	Joins to	Column
HLW_STAFF.DEPARTMENT_NO	=	HLW_DEPARTMENTS.DEPARTMENT_NO

14. Click **Next**.

15. 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.

Columns	Selected Columns
HLW_STAFF.EMPLOYEE_GENDER HLW_STAFF.EMAIL_ID HLW_STAFF.USER_ID HLW_STAFF.HIRE_DATE HLW_STAFF.ANNUAL_SALARY HLW_STAFF.COMMISSION HLW_STAFF.MANAGER_ID HLW_STAFF.REGION_ID HLW_STAFF.BUDGET HLW_STAFF.VACATION_DAYS HLW_STAFF.EMPLOYEE_ADDRESS HLW_STAFF.EMPLOYEE_CITY HLW_STAFF.EMPLOYEE_ZIP HLW_STAFF.EMPLOYEE_STATE	HLW_STAFF.EMPLOYEE_ID HLW_STAFF.NAME HLW_STAFF.JOB HLW_STAFF.DEPARTMENT_NO HLW_DEPARTMENTS.NAME

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

17. Click **Run**.

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.

18. Close the browser window that contains the report.

19. In the Manage Component page, click **Edit**.

20. 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.

21. Use the ▲ and ▼ buttons to reorder the columns as follows:

Selected Columns

```
HLW_STAFF.DEPARTMENT_NO
HLW_DEPARTMENTS.NAME
HLW_STAFF.EMPLOYEE_ID
HLW_STAFF.NAME
HLW_STAFF.JOB
```

22. To remove duplication of repeating values, you need to specify **break options** for the report.

Click the ⬛ (**Display Options**) tab.

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

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

Break Options

Choose whether to break the report on values in one, two or three column vlaues.

Break Style	Left Break
First Break Column	HLW_STAFF.DEPARTMENT_NO
Second Break Column	HLW_DEPARTMENTS.NAME
Third Break Column	%

25. 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**.

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

27. To make it easier to find an employee within a department, let's also order the report by employee ID.
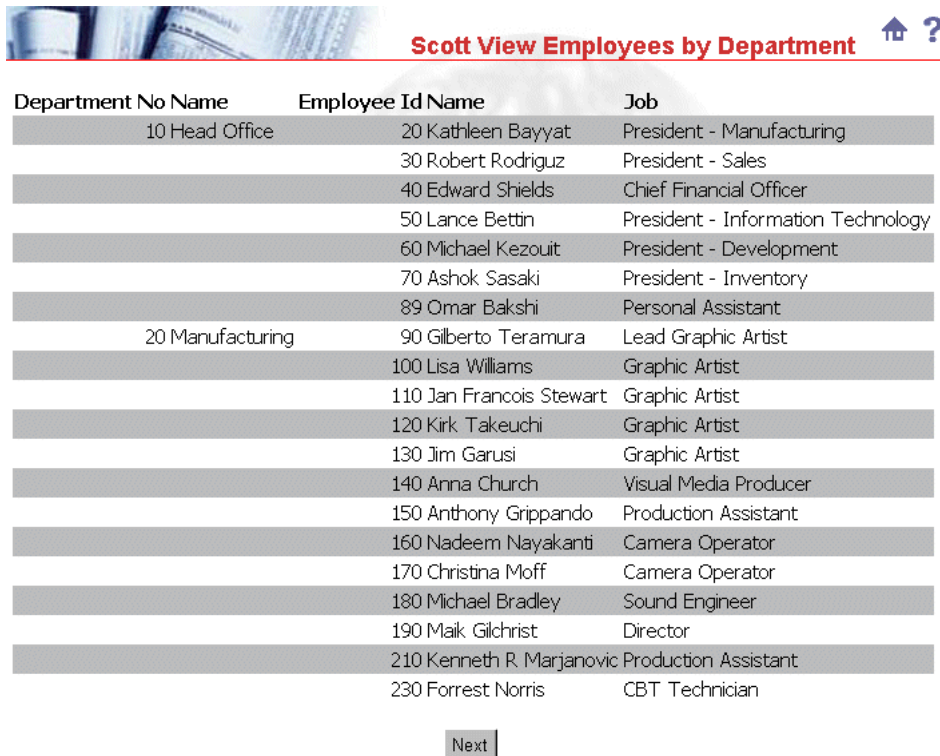
In the second **then by** list, choose **HLW_STAFF.EMPLOYEE_ID**.

Row Order Options

Choose the columns whose values will be used to sort rows in the report.

Order by	HLW_STAFF.DEPARTMENT_NO	Ascending
then by	HLW_DEPARTMENTS.NAME	Ascending
then by	HLW_STAFF.EMPLOYEE_ID	Ascending
then by	%	Ascending
then by	%	Ascending
then by	%	Ascending

28. 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**.

29. In the Manage Component page, click **Run** to view the changes you made.

30. 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**.

31. 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. Click **Chart**.

2. 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**.

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

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

5. 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.

Name	scotthrchart
Display Name	Scott View Salary per Department
Application	TUTORIAL30_APPLICATION

6. Click **Next**.

7. 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

8. Click **Next**.

9. 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.

10. 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.

11. 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 ✎ to set link parameters.

Label	DEPARTMENT_NO ▼
Link	% ▼ ✎
Value	ANNUAL_SALARY ▼
Group Function	SUM ▼

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

13. Click **Run**.

Scott View Salary per Department

70	118,580
10	642,350
20	711,500
60	1,276,600
30	1,938,800
50	3,100,200
40	3,378,000
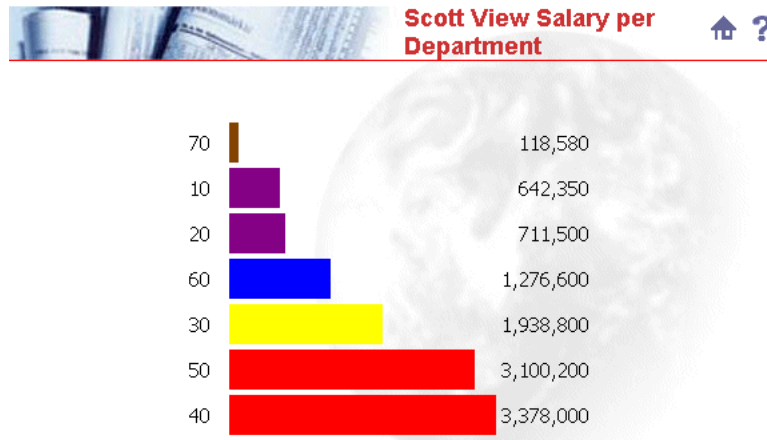
14. Close the browser window that contains the chart.

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**.

15. 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. In the row for **<YOURNAME>HRCHART**, click the **Grant Access** action.

2. Clear the **Inherit Privileges from Application** check box.

Privilege Mode

Check Inherit Privileges from Application to have the component inherit privileges from the application. Clear Inherit Privileges from Application to define component-specific privileges independent of the application.

☐ Inherit Privileges from Application

3. Click **Apply**.

4. Let's give the HLW_HR group privileges to run the chart.

   In the **Grantee** field, enter HLW_HR.

5. 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.

Grantee HLW_HR   🔲 🔲 Execute ▼   Add

6. 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.

	Grantee	Type	Privilege
✖	HLW_HR	GROUP	Execute ▼
✖	SCOTT	USER	Manage ▼

7. 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 Building Advanced Portals* manual.

For any other information about building application components, see the *Oracle Portal Online Help.*

A

Setting Up the Tutorial

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. To install these samples, follow the instructions in the Read Me file located in the same directory on http://technet.oracle.com 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**.

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 .

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**.

Glossary

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 *inter*Media 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.

***inter*Media Text**

Advanced gist, theme, and text retrieval services offered in Oracle 8*i* that enable search criteria to be compared against every word in every item within a content area. When *inter*Media 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 Travel The World,' 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 tor 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 *inter*Media 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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