Oracle® Personal Portfolio

Implementation and Administration Guide

Release 12

Part No. B31602-02

October 2006

Oracle Personal Portfolio Implementation and Administration Guide, Release 12

Part No. B31602-02

Primary Author: Personal Portfolio Documentation Team

Contents

4 Lookups

5 Workflows

Send Us Your Comments

Oracle Personal Portfolio Implementation and Administration Guide, Release 12

Part No. B31602-02

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Applications Release Online Documentation CD available on Oracle MetaLink and www.oracle.com. It contains the most current Documentation Library plus all documents revised or released recently.

Send your comments to us using the electronic mail address: appsdoc_us@oracle.com

Please give your name, address, electronic mail address, and telephone number (optional).

If you need assistance with Oracle software, then please contact your support representative or Oracle Support Services.

If you require training or instruction in using Oracle software, then please contact your Oracle local office and inquire about our Oracle University offerings. A list of Oracle offices is available on our Web site at www.oracle.com.

Preface

Intended Audience

Welcome to Release 12 of the *Oracle Personal Portfolio Implementation and Administration Guide.*

See Related Information Sources on page viii for more Oracle Applications product information.

TTY Access to Oracle Support Services

Oracle provides dedicated Text Telephone (TTY) access to Oracle Support Services within the United States of America 24 hours a day, seven days a week. For TTY support, call 800.446.2398.

Documentation Accessibility

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

Accessibility of Code Examples in Documentation

Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation

This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Structure

Related Information Sources

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

1

Product Overview

This chapter covers the following topics:

- Overview
- Dependencies and Integrations

Overview

Oracle Personal Portfolio is a portfolio management tool for institutions of higher education. It combines and centralizes portfolio functionality required by students, institutions, and third partiesOracle Personal Portfolio allows students to demonstrate competencies and showcase their work through portfolios accessible to external audiences.

Dependencies and Integrations

Although there are no dependencies and integrations for Oracle Personal Portfolio, it interacts with the following products:

- Oracle Workflow, page 1-1
- Oracle Trading Community Architecture, page 1-2

Oracle Workflow

Workflow functionality in Oracle Personal Portfolio allows users to automatically route information and deliver notifications to users regarding issues needing their attention or processes that have been completed.

You must install and run Oracle Workflow to use workflow functionality. For more information, see *Oracle Workflow Guide* and Chapter 2, Implementing Oracle Personal Portfolio.

Oracle Trading Community Architecture

Oracle Trading Community Architecture (TCA) is used to import person details. You can also import organization and contact detail using TCA. For more information on TCA, refer to *Oracle Trading Community Architecture Administration User Guide*.

2

Implementing Oracle Personal Portfolio

This chapter covers the following topics:

- Implementation Tasks
- Configuration Tasks

Implementation Tasks

This chapter contains information about the tasks a System Administrator must perform to implement and configure Oracle Personal Portfolio. The System Administrator must perform the following tasks to implement Oracle Personal Portfolio:

- Setting up Workflows, page 2-1
- Creating and Setting Responsibilities, page 2-2
- Setting Up Guest Accounts, page 2-2
- Setting Up Profile Options, page 2-2

Setting up Workflows

Oracle Personal Portfolio works in conjunction with Oracle Workflow to define and implement business processes. For more information, see *Oracle Workflow Guide*.

You must install Oracle Workflow to use workflow functionality in Oracle Personal Portfolio. Ensure that you have the appropriate version.

For information on Oracle Personal Portfolio seeded workflows, see Workflows, page 5-1. To query for Oracle Personal Portfolio workflows and business events, use **IGP%** as the search string.

Creating and Setting Responsibilities

Oracle Personal Portfolio includes some seeded user responsibilities. You can create additional responsibilities, modify menus and their functions, and specify which menu functions are included.

You must associate new responsibilities, with the Oracle Personal Portfolio account classifications. This ensures that they are available in the application.

User-defined responsibilities must be prefixed with **IGP**. For more information, see *Oracle Applications System Administrator's Guide*.

Setting Up Guest Accounts

Associate the Portfolio Guest Viewer responsibility to the application GUEST user.

Navigation

Security > User > Define

> **Tip:** Query for GUEST and add the Portfolio Guest Viewer responsibility.

Setting Up Profile Options

Profile options allow you to configure and customize the application to suit your requirements. You must set up the profile options described in the following table.

Profile Options

Profile Option Name	Description
IGP: Approver of Template to Publish	Specify the FND user responsible for approving templates who is set as the default user for the template approval workflow.
IGP: Approver of Portfolio Account Creation	Specify the FND user responsible for approving accounts who is set as the default user for the account approval workflow.

Configuration Tasks

After implementing Oracle Personal Portfolio, the System Administrator can create accounts and configure workflows.

Creating Accounts

Users can obtain user and portfolio accounts.

Navigation

Security > User > Define

Security > Responsibility > Define

Creating User Accounts

For users to obtain a user account, a record must exist in TCA. If a record does not exit, you must create one.

Create records in the Users window. You can associate responsibilities with a user during user definition.

Use the Responsibilities window to define or edit responsibilities.

Creating Portfolio Accounts

For users to obtain a portfolio account, a record must exist in the back-office application. To grant portfolio access to an existing user, associate an Oracle Personal Portfolio responsibility with the user in the Users window. You can also create portfolio accounts by using the self-service application. For more information, refer to Creating Accounts.

Configuring Workflows

The System Administrator can construct appropriate workflow events and sequences to accommodate account, portfolio, and template approval requirements.

The workflow can be customized to reflect your Oracle Personal Portfolio processes.

All workflow actions and events are recorded and can be viewed by the System Administrator.

3

Administering Oracle Personal Portfolio

This chapter covers the following topics:

Overview

Administering Oracle Personal Portfolio includes:

- Mapping Account Types, page 3-3
- Managing Accounts, page 3-4
- Managing Templates, page 3-5
- Uploading Public Artifacts, page 3-6
- Managing Portfolios, page 3-7

The following table describes the administrative functions available to the Portfolio Administrator and Career Administrator responsibilities.

Oracle Personal Portfolio Implementation Tasks

Task	Performed By
Mapping Responsibilities	Portfolio Administrator
Managing Accounts	Portfolio Administrator Career Administrator
Managing Templates	Portfolio Administrator Career Administrator
Uploading Public Artifacts	Portfolio Administrator Career Administrator

The Administration User Interface

The Notifications page is the home page for Oracle Personal Portfolio administrative users. On this page, you view notifications and access account- and portfolio-related functions.

Oracle Personal Portfolio Responsibilities

Oracle Personal Portfolio combines portfolio functionality required by students, schools, and other parties, including counselors and recruiters. Multiple seeded responsibilities accommodate the various user types. You assign responsibilities based on an individual's role. The role to responsibility mapping determines the rights and privileges available.

Oracle Personal Portfolio includes the following seeded responsibilities:

- Portfolio Administrator
- Portfolio Career Administrator
- Portfolio User
- Portfolio Registered Viewer
- Portfolio Guest Viewer

If required, you can add additional responsibilities. For more information, see Creating and Setting Responsibilities.

Portfolio Administrator

The Portfolio Administrator defines how responsibilities are mapped to roles, manages accounts and templates, uploads and manages artifacts, and assigns portfolio access to users.

Use the existing System Administrator functionality to create additional user responsibilities with Oracle Personal Portfolio menus and functions.

Portfolio Career Administrator

The Career Administrator acts as Career Counselor or Coordinator and assigns portfolio access privileges to reviewers.

With the exception of mapping responsibilities, the Career Administrator performs all the functions of the Portfolio Administrator.

Portfolio User

The Portfolio User responsibility is assigned to students allowing them to create, organize, and present portfolios to an audience.

Users create and edit files using the included HTML editor. They can also upload existing HTML files. Portfolios are shared by granting viewing permission to internal and external viewers.

Portfolio Registered Viewer

The Portfolio Registered Viewer responsibility is assigned to reviewers.

Registered viewers have a home page for notifications. They receive a login and associated responsibility and can view and comment on the accessible portfolios.

Portfolio Guest Viewer

Portfolio Guest Viewer responsibility is assigned to non-registered portfolio viewers. They receive an access link or URL and a PIN through e-mail. The PIN is unique and allows access to a specific portfolio.

Mapping Account Types

Oracle Personal Portfolio seeded system account types are Faculty, Staff, Student and External.

The Portfolio Administrator maps account types to Oracle Personal Portfolio responsibilities. This allows workflow processes to identify the responsibilities associated with each user. You can associate multiple responsibilities with a single account type. If required, you can edit the mapping.

Navigation

Account Management > Setup > Portfolio Responsibility Mapping

Managing Accounts

The seeded account types are **Internal** (faculty, staff, or student) or **External** (users associated with third-party organizations or external agencies, such as recruiters). Managing accounts includes:

- Creating Accounts, page 3-4
- Updating Accounts, page 3-5
- Deactivating Accounts, page 3-5

Creating Accounts

You can create accounts for internal and external viewers.

Creating Internal Accounts

You can create internal accounts only for users with FND records. For information, see Creating Accounts.

Navigation

Account Management > Accounts

Notes

- **Select check box:** Disabled if the person already has access or if the account has expired.
- **Expiration Date:** This is the expiration date for the responsibility associated with the selected account type. This field is disabled if the person already has an account or is awaiting account approval.

Creating External Accounts

Create external accounts for individuals associated with third-party organizations that coordinate with your institution for accrediting, employment, or recruitment. Creating external accounts includes creating organizations and contacts.

Creating Organizations

The organization with which the individual is associated must exist in the application.

Navigation

Account Management > Accounts

Notes

- **Identifying Address check box:** Indicates the primary address.

Creating Contacts

You can define contacts for existing organizations only.

Navigation

Account Management > Accounts

Updating Accounts

You can update both external and internal accounts.

Navigation

Account Management > Accounts

Deactivating Accounts

You can deactivate internal accounts.

You cannot deactivate organizations. You can only deactivate contact accounts.

Navigation

Account Management > Accounts

Notes

- **Multiple Responsibilities:** If multiple responsibilities are associated with the External account type, you must update the account type mapping. For more information, see Mapping Account Types.

Managing Templates

The Portfolio or Career Administrator can create and upload templates that, once approved, are made available to users.

The administrator also updates and manages existing templates. Once created, templates cannot be deleted. To make a template unavailable to users, specify an expiration date.

Managing Templates consists of the following tasks:

Creating Templates

Create a new template or one based on an existing format.

Navigation

Portfolio Management > Templates

Previewing Templates

Before editing or publishing, you can preview existing templates.

Navigation

Portfolio Management > Templates

Modifying Templates

Modify an existing template.

Navigation

Portfolio Management > Templates

Uploading Templates

Upload existing templates to make them available to users.

Navigation

Portfolio Management > Templates

Publishing Templates

You publish templates to make them available to users. When you initiate the template publication process, a workflow is launched and the template is routed to the appropriate person for approval. Once approved, the template is made available to users.

Navigation

Portfolio Management > Templates

Uploading Public Artifacts

Artifacts are non-HTML files, such as images and text files, used to create portfolios. Public artifacts are files made available to all users by the Portfolio or Career Administrator.

Navigation

Portfolio Management > Public Artifacts

Managing Portfolios

The Portfolio or Career Administrator performs the following portfolio management tasks:

- Viewing Portfolio Assignments, page 3-7
- Assigning Portfolios, page 3-7
- Viewing Portfolio Access Activities, page 3-7

Use the Portfolio Type field to filter the data displayed on the Portfolio Assignment page. Only portfolios published to career services by students are available to display.

> **Note:** In the Portfolio Type field, the choice of Unassigned Portfolios lists portfolios for which the administrator has not assigned viewers. Student assignment of viewers is not relevant.

Viewing Portfolio Assignments

The Portfolio or Career Administrator can view portfolio assignments by portfolio or viewer details.

Navigation

Portfolio Management > Portfolio Assignments

Assigning Portfolios

The author publishes a portfolio to the Career Center to make it available to viewers. The Portfolio or Career Administrator assigns viewers to the preassigned or unassigned portfolios.

Navigation

Portfolio Management > Portfolio Assignments

Viewing Portfolio Access Activities

The Portfolio or Career Administrator can view activities for any portfolio published to the Career Center by portfolio author, name, organization, or viewer.

Navigation

Portfolio Management > Portfolio Activity

4

Lookups

Managing Lookup Codes

This section contains the following information:

- Overview
- Configuring Lookups
- Oracle Personal Portfolio User Lookups
- Oracle Personal Portfolio System Lookups

Overview

A lookup type is a category of information, such as account type, also referred to as a List of Values. Each lookup type has a limited list of valid values. A lookup code is the allowable value for a lookup type.

Lookups provide lists of valid values for certain items of information. This has two key advantages:

- Ensures all users use the same terminology, which makes it easier to query on and report the information
- Speeds up data entry because users can enter just enough to identify the value, and Oracle Personal Portfolio completes the entry

You can define your own lookups, lookup types, and lookup codes as well as add values to some predefined lookup types. Lookup types can only be updated if the access level is **User** or **Extensible**.

Although you can make lookup types inactive, you cannot delete a record from a lookup type, regardless of its access level.

To remove an obsolete lookup, disable the lookup code, enter an end date, or change the meaning and description to match a replacement code.

Seeded lookups **cannot** be deleted.

Configuring Lookups

Currently, Oracle Personal Portfolio users cannot view and edit lookups and lookup codes from the application. To access lookups, the Portfolio Administrator must configure the application:

1. Define a Form function referencing the *Define Lookups* form (FNDLVMLU) with the following Parameter string:

VIEW_APPLICATION=IGS

1. Create a menu entry in a menu attached to a responsibility available from the application.

2. Reference the created function in the menu entry.

Oracle Personal Portfolio User Lookups

The following table describes the Oracle Personal Portfolio user lookups.

Oracle Personal Portfolio User Lookups

Lookup Type	Lookup Type Meaning	Lookup Code	Lookup Code Meaning
IGP_WZ_FONT_COLOR	Font color for creating HTML pages	#000000	Black
IGP_WZ_FONT_COLOR	Font color for creating HTML pages	#0000C0	Blue
IGP_WZ_FONT_COLOR	Font color for creating HTML pages	#008000	Green
IGP_WZ_FONT_COLOR	Font color for creating HTML pages	#BDB76B	Khaki
IGP_WZ_FONT_COLOR	Font color for creating HTML pages	#C0C0C0	Gray

Lookup Type	Lookup Type Meaning	Lookup Code	Lookup Code Meaning
IGP_WZ_FONT_COLOR	Font color for creating HTML pages	#FF0000	Red
IGP_WZ_FONT_COLOR	Font color for creating HTML pages	#FF00FF	Pink
IGP_WZ_FONT_COLOR	Font color for creating HTML pages	#FFA500	Orange
IGP_WZ_FONT_NAME	Font for creating HTML pages	ARIAL	Arial
IGP_WZ_FONT_NAME	Font for creating HTML pages	ARIAL_BLACK	Arial Black
IGP_WZ_FONT_NAME	Font for creating HTML pages	ARIAL_NARROW	Arial Narrow
IGP_WZ_FONT_NAME	Font for creating HTML pages	COMIC_SANS_MS	Comic Sans MS
IGP_WZ_FONT_NAME	Font for creating HTML pages	COURIER	Courier
IGP_WZ_FONT_NAME	Font for creating HTML pages	FONT	Font
IGP_WZ_FONT_NAME	Font for creating HTML pages	TAHOMA	Tahoma
IGP_WZ_FONT_NAME	Font for creating HTML pages	TIMES_NEW_ROMAN	Times New Roman
IGP_WZ_FONT_NAME	Font for creating HTML pages	VERDANA	Verdana
IGP_WZ_FONT_SIZE	Font size for creating HTML pages	6	1
IGP_WZ_FONT_SIZE	Font size for creating HTML pages	7	2

Lookup Type	Lookup Type Meaning	Lookup Code	Lookup Code Meaning
IGP_WZ_FONT_SIZE	Font size for creating HTML pages	8	3
IGP_WZ_FONT_SIZE	Font size for creating HTML pages	9	4
IGP_WZ_FONT_SIZE	Font size for creating HTML pages	10	5
IGP_WZ_FONT_SIZE	Font size for creating HTML pages	11	6
IGP_WZ_FONT_SIZE	Font size for creating HTML pages	12	7
IGP_WZ_FONT_SIZE	Font size for creating HTML pages	13	8
IGP_WZ_FONT_SIZE	Font size for creating HTML pages	14	9
IGP_WZ_IMAGE_TYPES	File type for managing graphics	IMAGE/GIF	GIF
IGP_WZ_IMAGE_TYPES	File type for managing graphics	IMAGE/PJPEG	JPEG

Oracle Personal Portfolio System Lookups

The Oracle Personal Portfolio seeded system lookups are listed below:

- IGP_AD_ACCOUNT_TYPES
- IGP_AD_ACC_CLASSES
- IGP_AD_ACC_CLASS_TYPES
- IGP_AD_EXT_ACC_SRCH_CRIT
- IGP_AD_INT_ACC_SRCH_CRIT
- IGP_US_COPY_PAGE_ACT

- IGP_US_FILE_SIZE
- IGP_US_FILE_TYPE
- IGP_US_MOVE_PAGE_ACT
- IGP_US_PORTFOLIO_TYPES
- IGP_US_UPLD_ARTIFACT_ACT
- IGP_VW_ACCESS_TYPE
- IGP_VW_INFO
- IGP_VW_OPEN_SEARCH
- IGP_VW_PUB_SEARCH
- IGP_VW_SEARCH_PORTFOLIO
- IGP_VW_VIEW
- IGP_WZ_PAGE_CRT_METHOD
- IGP_WZ_SRCH_ART_CRIT
- IGP_WZ_TEMP_CRT_METHOD
- IGP_WZ_TEMP_STATUS
- IGP_WZ_TEMP_TYPE
- IGP_WZ_SRCH_PG_CRIT

5

Workflows

Overview

Oracle Personal Portfolio includes the following seeded workflows:

- Portfolio Account Approval Workflow
- Template Approval Workflow
- Portfolio Deactivation Workflow
- Inform Author About Portfolio Assignment
- Notify Viewers of Portfolio Assignment
- Assignment Removal Notification Workflows
- Add Non-registered Viewers Workflow

Portfolio Account Approval Workflow

This workflow is triggered when a request for a portfolio account is made. This workflow is triggered in order to:

- Approve the creation of an account
- Create an FND user (for external accounts)
- Add responsibilities for a new or existing user
- Add account records

The recipient of the approval workflow receives the following information:

- Account classification: Identifies the type of account as External, Faculty, Staff, or Student
- Account information: Based on the account classification, information is provided to the approver. The following table lists the information provided to the approver for each account type.

Account Information

Account Type	information Provided
External	• User Name • Expiration Date
Staff Faculty	• Name • Person Number • Expiration Date
Student	• Student Name • Student Number • Expiration Date

When an account is approved, a notification is sent to the account requester. The workflow may be user-defined, such as e-mail, notification, or both. External accounts are not informed of account approval or generation if the workflow is set to **Notifications**.

Upon approval of an internal account, a concurrent request is run to generate:

- A party in TCA, if applicable
  - An FND user account
  - An Oracle Personal Portfolio account
  - Associated responsibilities

Template Approval Workflow

This workflow is triggered when a request for a template publication is made. This workflow is triggered in order to approve and publish the template.

Template approval can be set up in either of the following ways:

- An approval hierarchy can be set up through a standard workflow capability
- A profile value can be set to assign a single approver

Portfolio Deactivation Workflow

The deactivation workflow is triggered when a portfolio account is dedicative. It generates and sends a notification to the Portfolio Super User or the user who issued the deactivation request.

Inform Author About Portfolio Assignment

This workflow is triggered when a viewer is assigned to a portfolio. It generates a notification containing the viewer details, which is sent to the portfolio author.

Notify Viewers of Portfolio Assignment

This workflow is triggered when a viewer is assigned to a portfolio. It generates a notification containing the portfolio details, which is sent to the viewers.

Assignment Removal Notification Workflows

Each viewer has an access list that displays the portfolios the view has access to. A workflow is triggered when a viewer removes a portfolio from the access list. The workflow triggered depends on who assigned the portfolio to the viewer. If the portfolio was assigned by the portfolio author, the A*ssignment Removal Notification: Author* workflow is triggered. Alternatively, if the portfolio was assigned by the career administrator, the A*ssignment Removal Notification: Career Center* workflow is triggered.

Each workflow generates a notification containing the viewer and portfolio details. Depending on the workflow triggered, the notification is sent to the portfolio author or career administrator.

Add Non-registered Viewers Workflow

This workflow is triggered when a non-registered viewer is assigned to a portfolio.