BEA WebLogic Portal™

Tour of the Stock Portal

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Tour of the Stock Portal

Part Number	Date	Software Version
N/A	January 2002	4.0, Service Pack 1

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About This Document

This document provides information about the Stock Portal. The Stock Portal demonstrates a variety of possibilities in portlet design and content.

This document covers the following topics:

- Chapter 1, "What is the Tour of the Stock Portal" provides a brief description of the tour, licensing, and how to start the tour.
- Chapter 2, "Visitor Options" is a tour of visitor customizations, such as portlet layout, and describes portlet controls.
- Chapter 3, "Portal Management" is a tour of all the portal functionality available in the WebLogic Portal Administration Tools.

What You Need to Know

This document is intended for all members of a Web-site development team. It assumes that you are familiar with features that are common to all Web sites.

e-docs Web Site

BEA product documentation is available on the BEA corporate Web site. From the BEA Home page, click on Product Documentation or go directly to the "e-docs" Product Documentation page at http://edocs.bea.com/..

How to Print the Document

You can print a copy of this document from a Web browser, one file at a time, by using the File—>Print option on your Web browser.

A PDF version of this document is available on the WebLogic Portal documentation Home page on the e-docs Web site (and also on the documentation CD). You can open the PDF in Adobe Acrobat Reader and print the entire document (or a portion of it) in book format. To access the PDFs, open the WebLogic Portal documentation Home page, click the PDF files button and select the document you want to print.

If you do not have the Adobe Acrobat Reader, you can get it for free from the Adobe Web site at http://www.adobe.com/.

Related Information

The following BEA WebLogic Portal documents contain information that is relevant to using WebLogic Portal and developing portlets.

- *Getting Started with Portals and Portlets*
- *Portal Tour*
- *Deployment Guide*
- *Guide to Developing Campaign Infrastructure*
- *Guide to Events and Behavior Tracking*
- *Guide to Building Personalized Applications*
- *Guide to Managing Presentation and Business Logic: Using Webflow and Pipeline*

Contact Us!

Your feedback on the BEA WebLogic Portal documentation is important to us. Send us e-mail at **docsupport@bea.com** if you have questions or comments. Your comments will be reviewed directly by the BEA professionals who create and update the WebLogic Portal documentation.

In your e-mail message, please indicate that you are using the documentation for the BEA WebLogic Portal 4.0, SP 1 release.

If you have any questions about this version of BEA WebLogic Portal, or if you have problems installing and running BEA Stock Portal, contact BEA Customer Support through BEA WebSupport at **www.bea.com**. You can also contact Customer Support by using the contact information provided on the Customer Support Card, which is included in the product package.

When contacting Customer Support, be prepared to provide the following information:

- Your name, e-mail address, phone number, and fax number
- Your company name and company address
- Your machine type and authorization codes
- The name and version of the product you are using
- A description of the problem and the content of pertinent error messages

Documentation Conventions

The following documentation conventions are used throughout this document.

Convention	Item
boldface text	Indicates terms defined in the glossary.
Ctrl+Tab	Indicates that you must press two or more keys simultaneously.

Convention	Item
italics	Indicates emphasis or book titles.

`monospace text`	Indicates code samples, commands and their options, data structures and their members, data types, directories, and file names and their extensions. Monospace text also indicates text that you must enter from the keyboard.
	Examples:
	`#include <iostream.h> void main ( ) the pointer psz`
	`chmod u+w *`
	`\tux\data\ap`
	`.doc`
	`tux.doc`
	`BITMAP`
	`float`

`monospace boldface text`	Identifies significant words in code. *Example*: `void` **`commit`** `( )`
`monospace italic text`	Identifies variables in code. *Example*: `String` *`expr`*
UPPERCASE TEXT	Indicates device names, environment variables, and logical operators. *Examples*: LPT1 SIGNON OR
`{ }`	Indicates a set of choices in a syntax line. The braces themselves should never be typed.

`[ ]`	Indicates optional items in a syntax line. The brackets themselves should never be typed.
	Example:
	`buildobjclient [-v] [-o name ] [-f` *`file-list`*`]...`
	`[-l` *`file-list`*`]...`

`|`	Separates mutually exclusive choices in a syntax line. The symbol itself should never be typed.

Convention	Item

. . .	Indicates one of the following in a command line:
	■ That an argument can be repeated several times in a command line
	■ That the statement omits additional optional arguments
	■ That you can enter additional parameters, values, or other information
	The ellipsis itself should never be typed.
	Example:
	`buildobjclient [-v] [-o name ] [-f file-list]...`
	`[-l file-list]...`

. . .	Indicates the omission of items from a code example or from a syntax line. The vertical ellipsis itself should never be typed.

1 What is the Tour of the Stock Portal

Welcome to the Tour of the Stock Portal. The Stock Portal is a basic portal configuration that you can use for getting acquainted with the portal features of BEA WebLogic Portal 4.0. The Stock Portal has three tabs, each containing portlets that demonstrate several possibilities in portlet design and content. The Misc. tab contains several purely generic portlets intended for developers to use for design and experimentation. The Avitek Financial Sample Portal contains a number of portlets that further demonstrate portlet design and possibility. You can get the Sample Portal at the BEA Developer Center (http://developer.bea.com/index.jsp). You can learn more about the Sample Portal in the *Tour of the Avitek Financial Portal*.

The Tour of the Stock Portal is intended to primarily demonstrate features available in WebLogic Portal. This tour consists of follow along, step-by-step instructions for changing the appearance and composition of the Stock Portal application and its portlets, plus descriptive information about various portal features. In the first part of the tour, you become acquainted with the various visitor options—you do things like create a new user; change the color scheme (skin) of the portal; and add, remove, and move portlets. In the second part of the tour you learn about portal management—you do the same kinds of things for groups that you did for visitor options, plus you learn about entitlements, administrative privileges, and delegation.

The tour includes the following sections:

- About the Product Licenses and This Tour
- Getting Started

About the Product Licenses and This Tour

Two types of product licenses are available that affect which features of the WebLogic Portal and WebLogic Personalization Server software you can use:

- The WebLogic Portal license—This license contains all product features. That is, all the services related to the development of Web-based portals, all Campaign and Commerce services, and all the features of the WebLogic Personalization Server.
- The WebLogic Personalization Server only license contains only personalization services.

During the product software installation, all components are installed. However, your license file is checked at run-time to determine which features you can use. This tour documents a sample portal application that is available only when using the full WebLogic Portal license.

The Stock Portal application shown in this tour cannot be run if you have the WebLogic Personalization Server only license. However, there is a separate tour document for WebLogic Personalization Server users; see the "Personalization Examples."

For information about how the license file is configured on your system, see the "Post-Installation Considerations" in the*Installation Guide*. For information about which product features are available with each type of product package license, see "About Licensing" the WebLogic Portal 4.0 document Home page.

Getting Started

Before you begin the Tour of the Stock Portal, make sure the following are installed:

- WebLogic Server 6.1
- WebLogic Portal Service Pack 1

Also before beginning the tour, you need to complete the following steps:

1. Start the WebLogic Portal as follows:

   Windows: Start Menu → Programs → BEA WebLogic E-Business Platform → BEA WebLogic Portal 4.0 → Start BEA WebLogic Portal

   UNIX: Run <install directory>/WebLogicPortal4.0/StartPortal.sh

2. Enter the login password that was set up during WebLogic Portal installation.

Startup is complete when the console window shows that the server is running in production mode.

Note: When you start the WebLogic Portal for the first time, the startup process can take several minutes. Subsequent startups happen more quickly.

3. Start the Stock Portal as follows:

   Windows: Start Menu → Programs → BEA WebLogic E-Business Platform → BEA WebLogic Portal 4.0 → Start Portal Example

   UNIX: Log on to the Stock Portal client. If you installed WebLogic Portal with the default settings, you can use the following URL in a browser that is invoked on the same machine as the server:

   ```
   http://localhost:7501/stockportal/index.jsp
   ```

   where localhost is the name of the server running the Sample Portal.

Note: The default port is 7501. For information on changing port numbers, see "Configure Listen Ports" in the *Deployment Guide*.

2 Visitor Options

Portal visitors can use browser-based tools to personalize the makeup and appearance of their portal. This topic details the portal features that are available to registered visitors. Step-by-step instructions tell you how to register a new user, change the look-and-feel of the portal, change which pages you can see, change the layout of each page, change which portlets are visible, and use and edit portlet controls. It includes the following sections:

- The Home Page
- Registering a New User
- Changing the Color Theme of Your Portal
- Customizing the Portal Layout
- Portlets

The Home Page

The default Stock Portal Home page is shown in Figure 2-1.

Figure 2-1 Stock Portal Home Page—Default

Notice that the default Home Page contains four portlets, three page tabs, and a login button. After visitors log in, they can change the appearance and layout of the Home and other tabs.

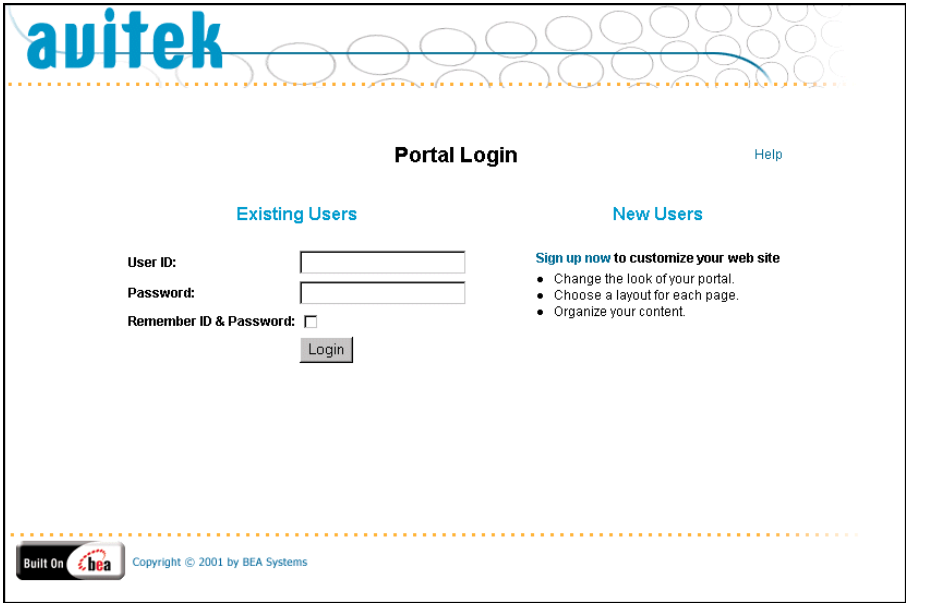
Registering a New User

Access of a visitor to a portal and that visitor's primary view of the portal is determined by the visitor's group membership. To demonstrate some of the features of the Stock Portal, you'll register as a new user.

To register as a new user, complete the following steps:

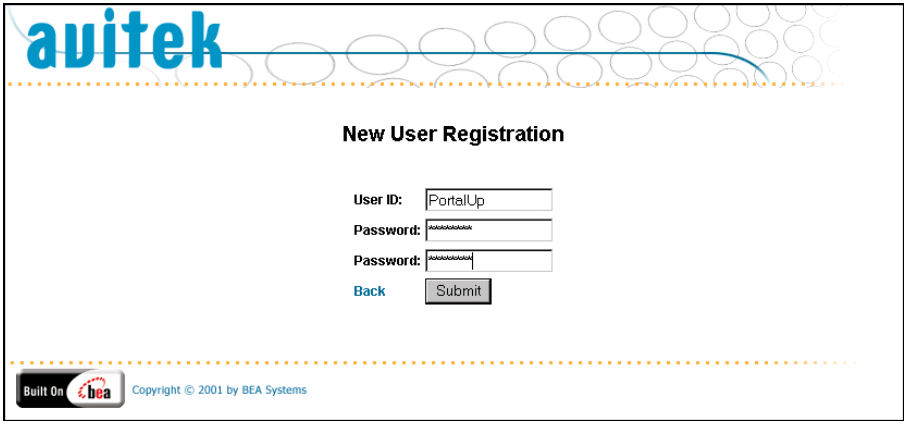
1. Click the login button. The login page appears, as shown in Figure 2-2.

Figure 2-2 Stock Portal—Login Page



2. Click Sign up now. The New User Registration Page appears, as shown in Figure 2-3.

Figure 2-3 Stock Portal—New User Registration Page



3. Create a new user ID and password. Then click the submit button. The Home page opens, as shown in Figure 2-4.

Figure 2-4 Stock Portal Home Page—User Logged In

Notice that the page now contains a Customize My Portal button and a Change Password button. Also notice that the Login button has changed to a Logout button. Now, we'll begin customizing the portal.

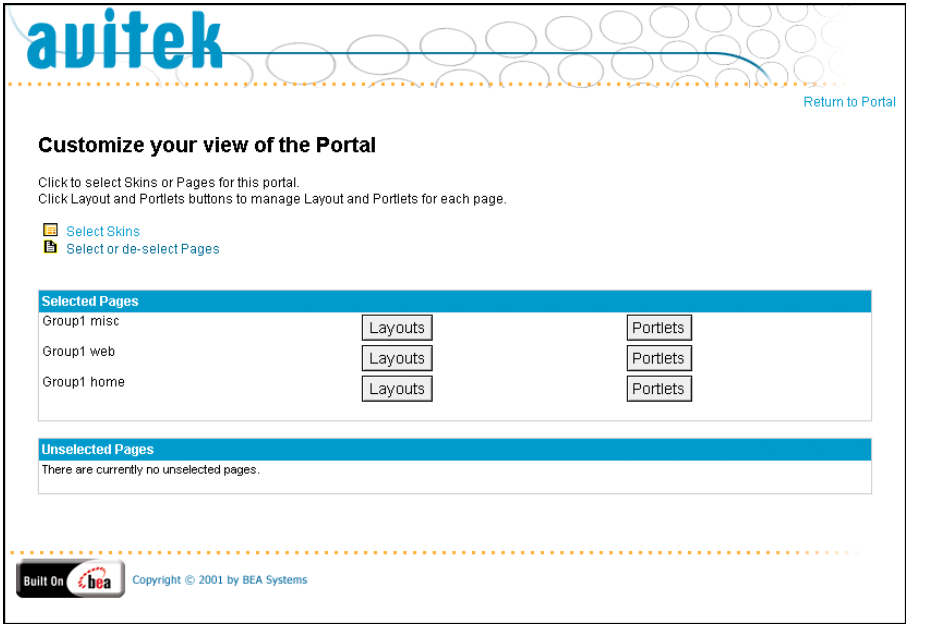
Changing the Color Theme of Your Portal

Changing the color theme of a portal means changing the skin. A skin changes the look-and-feel of the portal and controls such elements of the portal presentation as the portal logo, portlet control images (such as the minimize or edit icons), default font face and size, and color attributes. Skins consist of Cascading Style Sheet (CSS) files and directories of images. Five pre-built skins are provided; an HTML developer can create new skins by modifying the CSS files and creating new images.

To change the default skin, complete the following steps:

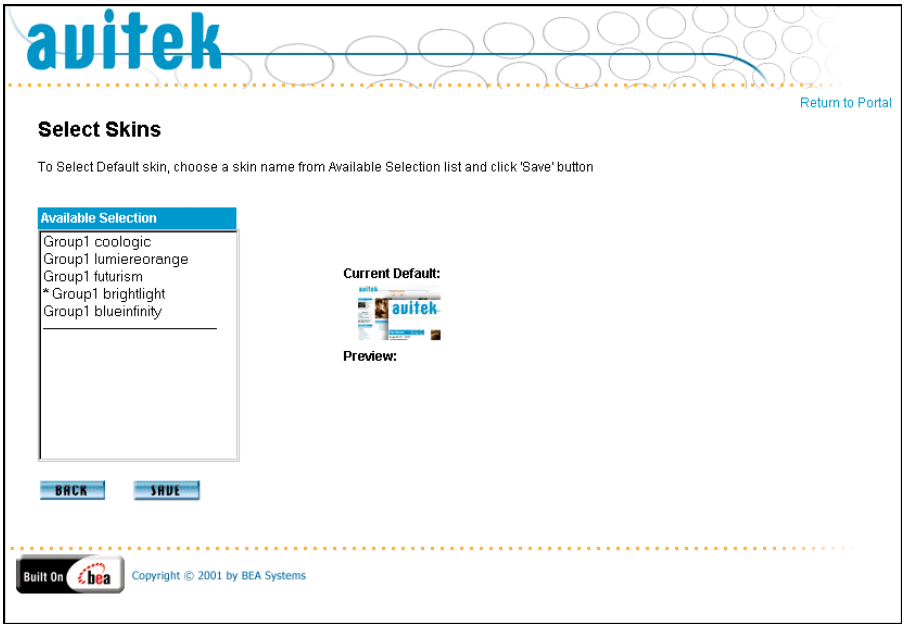
1. Click the Customize My Portal button. The Customize Your View of the Portal page appears, as shown in Figure 2-5.

Figure 2-5 Customize Your View of the Portal Page



2. Click Select Skins. The Select Skins page appears, as shown in Figure 2-6.

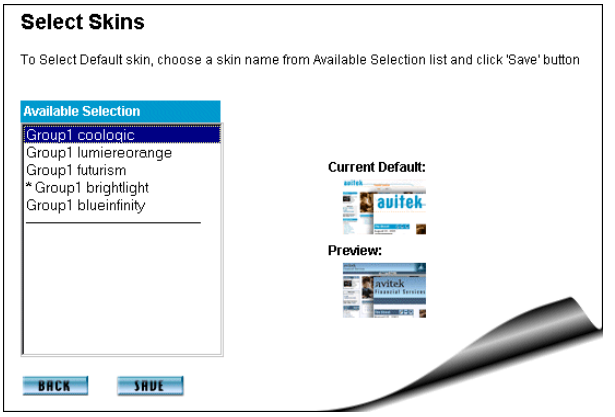
Figure 2-6 Select Skins Page



Note: The asterisk in the Available Selections list designates the current default.

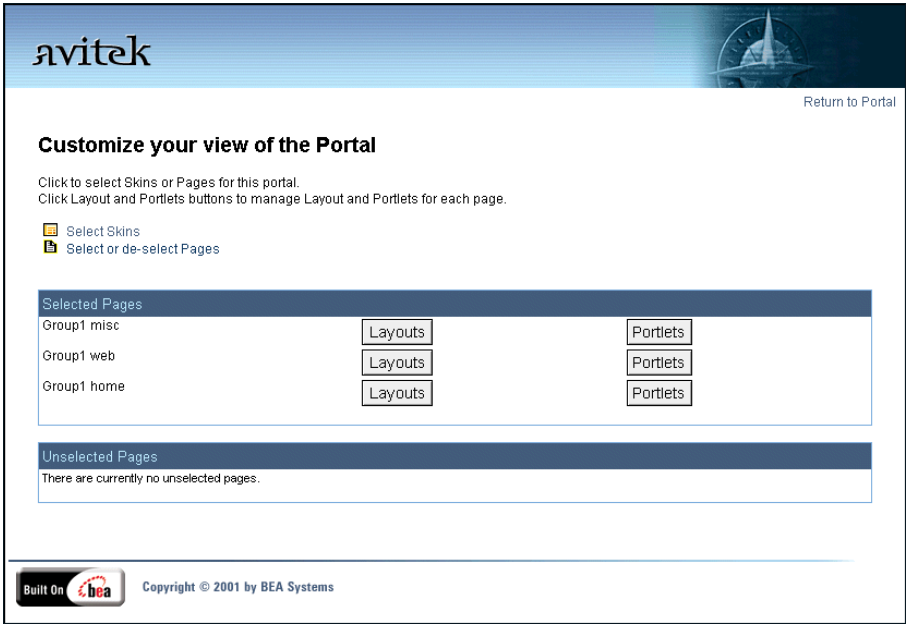
3. In the Available Selections list, select an item from the list.
4. Notice that a preview of the selection appears, as shown in Figure 2-7.

Figure 2-7 Select Skins Page—Skin Preview



5. Click the Save button. The Customize Your View of the Portal page appears with the new skin, as shown in Figure 2-8.

Figure 2-8 Customize Your View of the Portal—New Skin



Customizing the Portal Layout

Registered visitors can tailor the layout of a portal to suit their needs and preferences. They can determine which pages are visible, which page is the Home page, which portlets they can see, and how the portlets are arranged on each page.

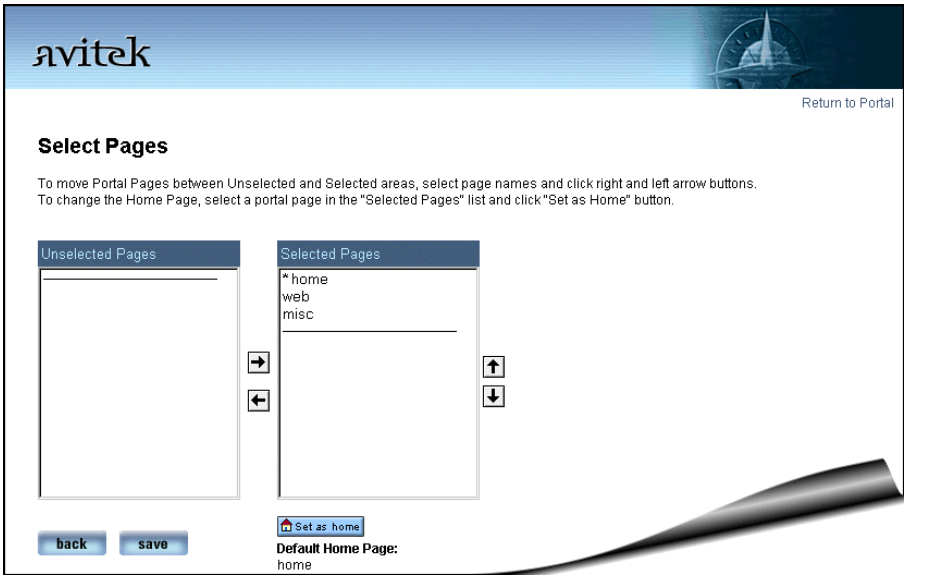
Changing Which Pages Are Visible

The main content area of the home page may contain one or more pages that are *stacked* on top of each other. A tabbed navigation bar allows visitors to quickly switch between pages. In this section, you will change which page tabs are visible on the Home page. The default Stock Portal displays three page tabs: Home, Web, and Misc.

To change which page tabs you see, complete the following steps:

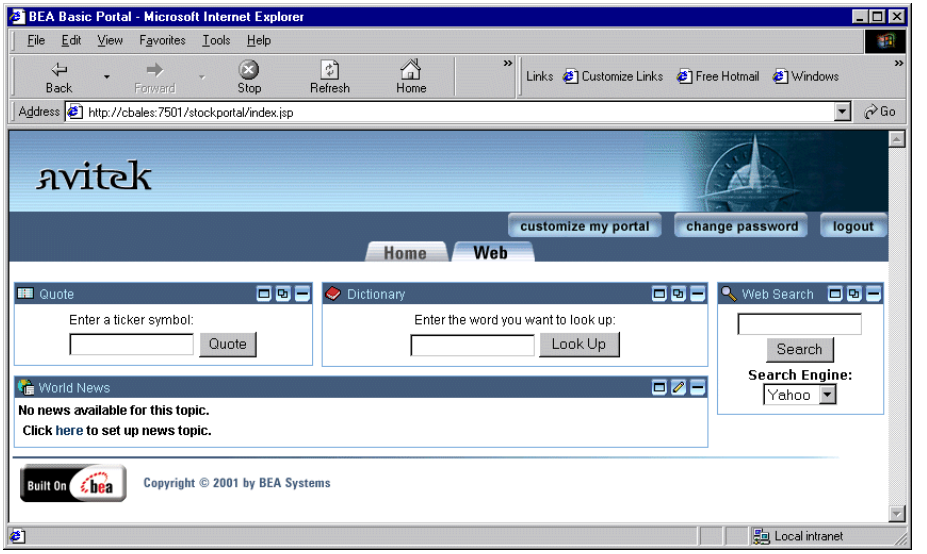
1. Click Select or De-select Pages. The Select Pages page appears, as shown in Figure 2-9.

Figure 2-9 Select Pages



2. Move misc from Selected Pages to Unselected Pages.
3. Select web, and then click the Set As Home button.
4. To implement your changes, click the Save button.
5. To see your changes, click Return to Portal. The new Home page appears showing the changes you just made, as shown in Figure 2-10.

Figure 2-10 Stock Portal Home Page—Two Visible Tabs



Changing the Layout of a Page

The layout of a page defines how portlets are arranged on a page. Essentially, a layout is a *wireframe* that uses an HTML table containing certain JSP tags. WebLogic Portal provides five pre-built layouts. This structure provides for a wide range of possible layouts so HTML developers can easily create new layouts.

In this part of the tour, you will change the layout of a page.

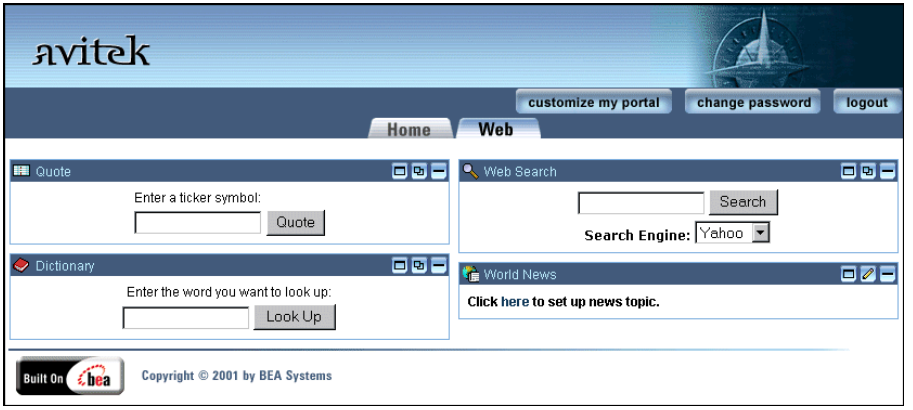
To change a page's layout, complete the following steps:

1. From the Home Page, click the Customize My Portal button. The Customize Your View of the Portal page appears.
2. In the Selected Pages section, click the Layouts button for the Web page. The Select Current Layout page appears, as shown in Figure 2-11.

Figure 2-11 Select Current Layout Page

3. Click twocolumn in the Available Layouts list. A preview of the layout appears next to the list.
4. To implement your change, click the Save button.
5. To see your changes, on the Customize Your View of the Portal page, click Return to Portal. The new Web page appears showing the changes you just made, as shown in Figure 2-12. Figure 2-10 shows what the page looked like before you changed its layout.

Figure 2-12 Stock Portal Home Page—New Layout



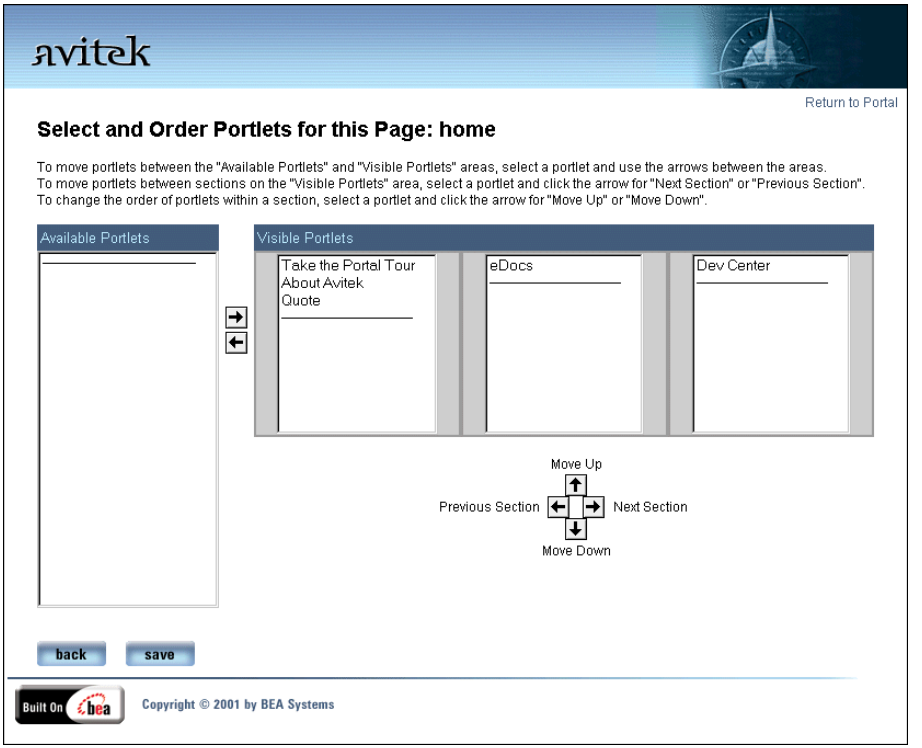
Changing Which Portlets You Can See

Beside changing the layout of a page, you can also change which portlets are visible, which column they are in, and their position with a column.

To change the visible portlets, complete the following steps:

1. From the Home Page, click the Customize My Portal button. The Customize Your View of the Portal page appears.
2. In the Selected Pages section, click the Portlets button for the Home page. The Select and Order Portlets page appears, as shown in Figure 2-13.

Figure 2-13 Select and Order Portlets for this Page: home



3. Using the arrow button, configure the Home Page to your liking.
   - To add or remove a portlet from view, select the portlet, and then use the arrows buttons between the Available Portlets and Visible Portlets sections.
   - To move a portlet between sections, select the portlet, and then use the Next Section and Previous Section arrows.
   - To change the order of portlets within a section, select a portlet, and then use the Move Up and Move down arrows.
4. To implement your changes, click the Save button.
5. To see your changes, click Return to Home Page, and click the Home tab. Figure 2-14 shows one possible change. Figure 2-1 shows what the Home tab looked like before the changes.

Figure 2-14 Stock Portal Home Tab—New Portlet Arrangement

Portlets

A portlet is a specialized content area that occupies a small window on a portal page. Portlets can be stand-alone, web-based applications or display legacy or third-party applications. They may have more than one view. For example, a portlet may be maximized, minimized, or detached from the portal. Portlet views are implemented using JavaServer Pages (JSP). They range in complexity from containing simple static HTML content, to employing JSP tag libraries or JSP scriptlets that access EJB components or other application functionality within the application server. The appearance of portlets can change based on the selected skin.

The controls for portlets in the Stock Portal are listed in Table 2-1.

Table 2-1 Portlet Controls

Button	Description
	Opens a Help window.
	Maximizes the portlet to the full size of the browser window.
	Returns a maximized portlet to its original size.
	Opens the portlet for editing. For more information, see "Portlet Editing" on page 2-15.
	Closes the portlet from editing. For more information, see "Portlet Editing" on page 2-15.
	Opens the portlet in a separate browser window.
	Minimizes the portlet so that only the Title displays.
	Returns the minimized portlet to its original size.

Portlet Editing

This section describes how to configure the World News portlet. This portlet links to various news agencies on the internet and displays the new stories they publish.

To edit the World News portlet, complete the following steps:

1. From the Home page, click the Web tab. Figure 2-15 shows the World News Portlet before it has been configured.

   Note: If you do not see the controls in the title bar of the World News portlet, you must login.

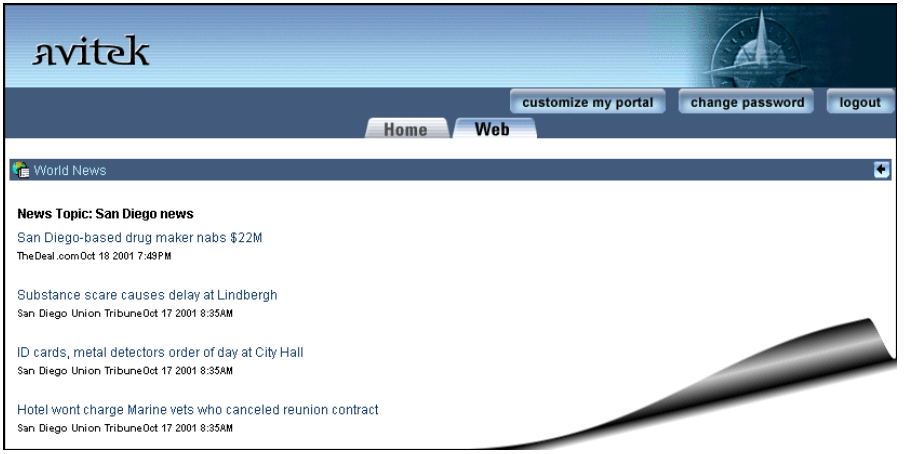
Figure 2-15 World News Portlet—Not Configured

2. Click the Edit button in the titlebar. The portlet maximizes and is now editable, as shown in Figure 2-16.

Figure 2-16 World News Portlet—Editable

3. Select a Topic and a Template from their respective drop-down lists, and then click the Save button. The portlet now shows the topics from the selected news source, as shown in Figure 2-17.

Figure 2-17 World News Portlet—Configured



4. To view a news story, click a link. The story is displayed in a new browser page.
5. To return the portlet to its default size, click the finish button.

This concludes the Visitor part of the Stock Portal tour.

3 Portal Management

WebLogic Portal 4.0 provides specific sets of tools for the development, deployment, and administration of an enterprise's sites. Theses tools are contained in the BEA E-Business Control Center and the WebLogic Portal Administration Tools. This topic includes the following:

- Overview of Portal Management
- About This Part of the Tour
- Access WebLogic Portal Administration Tools from UNIX
- Access WebLogic Portal Administration Tools from Windows
- Portal Management Home
- What's Next

Overview of Portal Management

The E-Business Control Center provides a Java-based GUI interface for the corporate developer. It contains tools for managing tasks that require change management. The rich graphical interfaces of the E-Business Control Center simplify complex tasks such as rule definition, Webflow editing, and portal creation and management.

The browser-based WebLogic Portal Administration Tools can be easily accessed by and delegated to authorized users. Tasks performed through these tools typically take effect immediately on the running portal instance, and do not undergo a change management process. The user interface of the WebLogic Portal Administration Tools is implemented using JSPs.

This section of the Tour of the Stock Portal focuses on the WebLogic Portal Administration Tools. E-Business Control Center tools are not part of this tour.

In this part of the tour, you will be accessing the WebLogic Portal Administration Tools as a System Administrator. As such you will have access to all administrative functionality.

WebLogic Portal has delegated administrative capabilities, which is sometimes called decentralized administration. Delegating authority takes the load off the central administrator and enables other users to perform tasks related to their responsibilities. Delegated administrators have limited access based on their delegated administrative settings. For example, an R&D manager would have control of an engineering portal while a QA manager would have control of the QA portal. For more information about delegated administration, see "Overview of Portal Administration" in *Getting Started with Portals and Portlets*.

About This Part of the Tour

This part of the tour is an overview of the portal management features. Although numbered steps are provided, it is not a strict step-by-step set of instructions as are the steps in the Visitor Options section. Feel free to explore and make changes not specified in this tour.

Access WebLogic Portal Administration Tools from UNIX

To access the WebLogic Portal Administration Tools from UNIX, do the following:

1. If WebLogic Portal is not already running, enter the following command from a WebLogic Personalization Server host:

   ```
   PORTAL_HOME/StartPortal.sh
   ```

2. From your workstation, open a Web browser, and then enter the following URL:

```
http://Portal-host:7501/portalTools/index.jsp
```

For example, if the WebLogic Portal host is a workstation named niwot, enter the following URL in your Web browser:

```
http://niwot:7501/portalTools/index.jsp
```

Note: By default, the WebLogic Portal host name is sufficient for the Portal-host:7501 parameter of the URL. However, if your system administrator changes the server configuration to require fully qualified domain names, you must supply one. In this case, the URL in step 2 would change to `http://Portal-host.domain-name:7501/portalTools/index.jsp`. For example, if the WebLogic Portal host is a workstation named niwot and the domain name is mallory.com, enter the following URL in your Web browser:

```
http://niwot.mallory.com:7501/portalTools/index.jsp
```

3. In the Enter Network Password dialog box, enter the following:

   Username: administrator

   Password: password

   The WebLogic Portal Administration Tools page appears, as shown in Figure 3-1.

Access WebLogic Portal Administration Tools from Windows

To access the Home page from Windows, do the following:

1. If WebLogic Portal is not already running, on a WebLogic Portal host, do one of the following:
   - Click Start → Programs → BEA WebLogic E-Business Platform → BEA WebLogic Portal 4.0 → Start BEA WebLogic Portal.
   - Click the desktop icon titled Start BEA WebLogic Portal.

- From a command prompt, enter the following command:

  ```
  PORTAL_HOME\StartPortal.bat
  ```

2. From your computer, open a Web browser and enter the following URL:

   ```
   http://Portal-host:7501/portalTools/index.jsp
   ```

   For example, if the WebLogic Portal host is a workstation named niwot, enter the following URL in your Web browser:

   ```
   http://niwot:7501/portaltools
   ```

Note: By default, the WebLogic Portal host name is sufficient for the Portal-host:7501 parameter of the URL. However, if your system administrator changes the configuration to require fully qualified domain names, you must supply one. In this case, the URL in step 2 would change to `http://Portal-host.domain-name:7501/portalTools`. For example, if the WebLogic Portal host is a workstation named niwot and the domain name is mallory.com, enter the following URL in your Web browser:

```
http://niwot.mallory.com:7501/portalTools/index.jsp
```

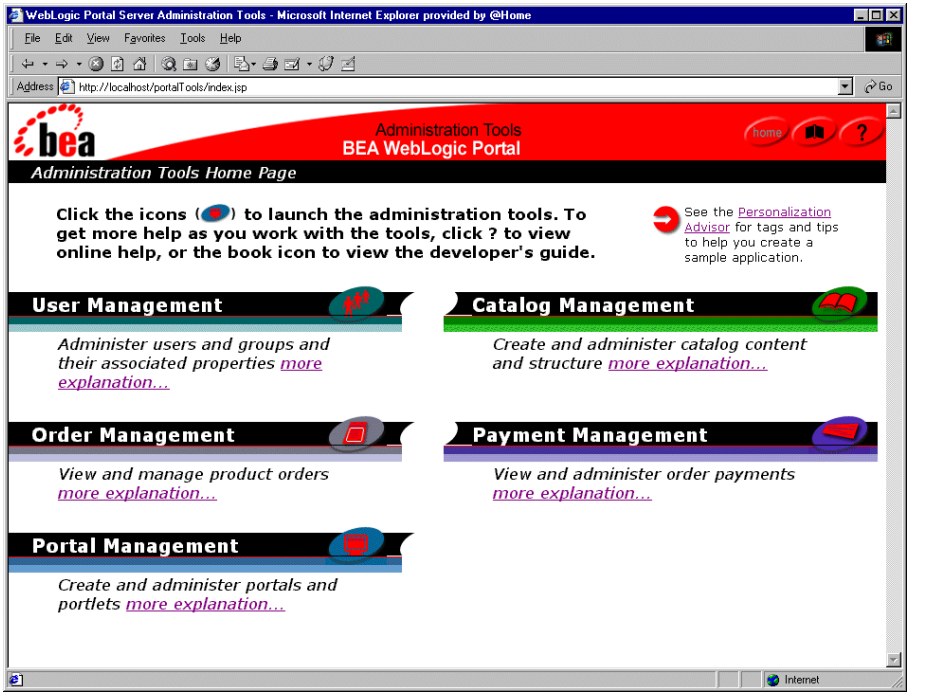
3. In the Enter Network Password dialog box, enter the following:

   Username: administrator

   Password: password

   The WebLogic Portal Administration Tools page appears, as shown in Figure 3-1.

Figure 3-1 WebLogic Portal Administration Tools



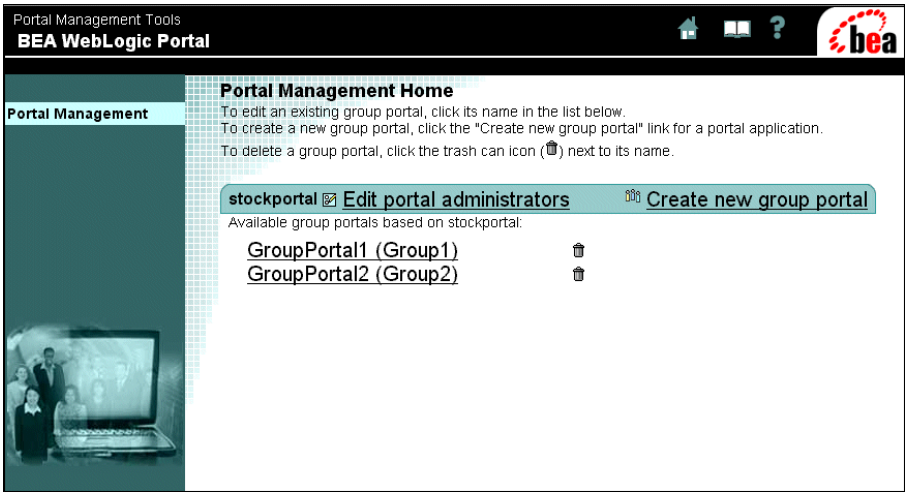
Portal Management Home

The Portal Management Home page allows you to edit existing group portals, create new group portals, delete group portals, and delegate portal administrators. Groups are a set of permissions and attributes that define what users see on a portal and what they can change. For example, an employee might see a portal with a Home page that contains portlets such as Employee Newsletter, Human Resources, and the Company Store, while a manager might see portlets such as Corporate Meetings, Administration, and Expense Reporting. Each Home page could contain different page tabs and skins. Groups allow you to configure different portals for different users and delegate privileges to other administrators.

Two groups are provided with the Stock Portal. These two groups highlight some of the features available with groups, such as different skins and different content.

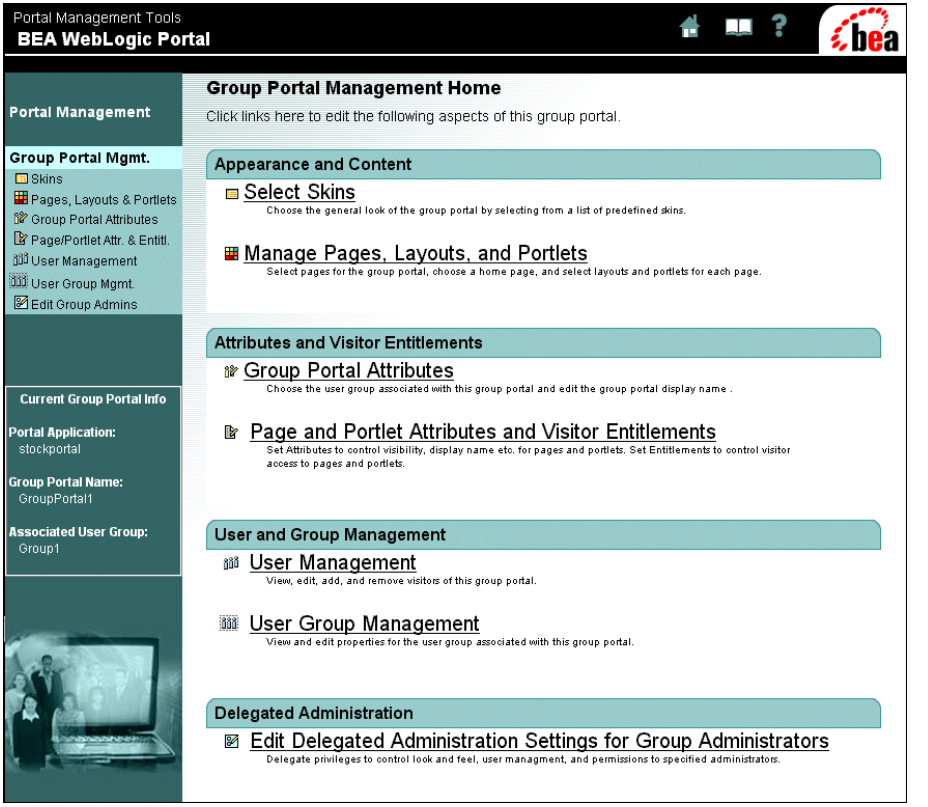
1. To access the Portal Management Home page, click the Portal Management icon on the WebLogic Portal Administration Tools page. The Portal Management Home page appears, as shown in Figure 3-2.

Figure 3-2 Portal Management Home—Initial



2. In the right column of the Portal Management Home page, click GroupPortal1 (Group1). The Portal Management Home page, as shown in Figure 3-3.

Figure 3-3 Portal Management Home—GroupPortal1



As you can see from Figure 3-3, the Portal Management Home page provides a number of portal group functions. The left menu column provides direct access to each of the Portal Management Home capabilities. These links access the same pages as those listed under each category in the right column.

The right column on this page is essentially a Table of Contents that provides a brief description of each aspect of portal capability. Generally, the right column contains the controls for defining the various group-related tasks. As a system administrator, you can see all available tasks. Delegated administrators will see a subset of these tasks based on their delegated privileges. A description of each category is presented in the sections that follow.

Note: In the WebLogic Portal Administration Tools, page tabs are just called pages. This terminology is used from this point on in the tour.

Appearance and Content

In this category you can do the following:

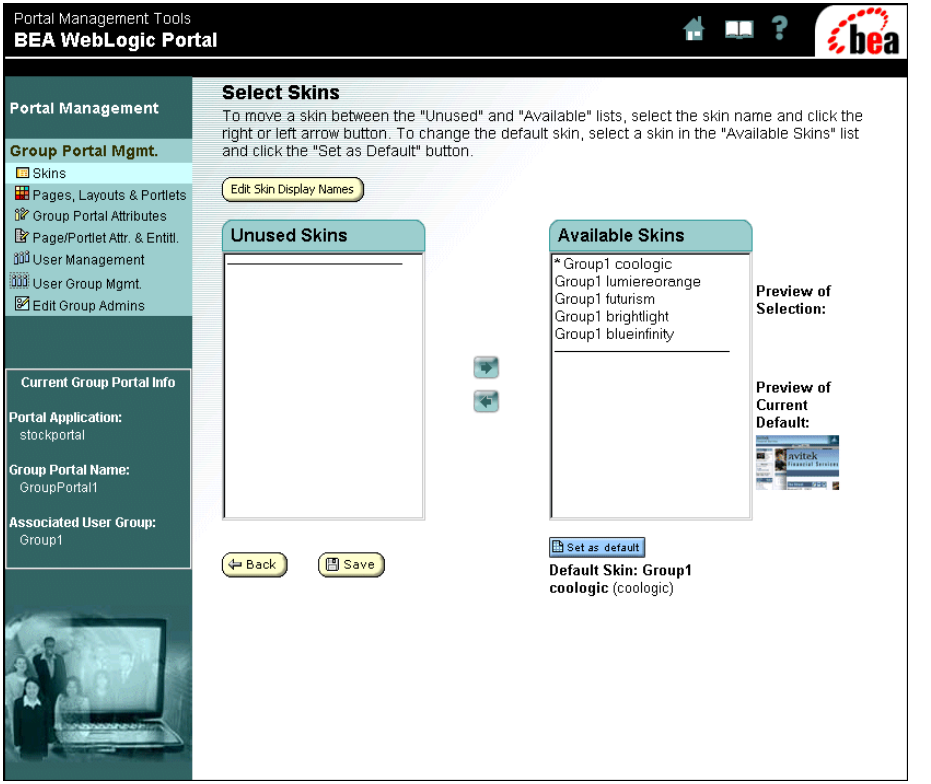
- Select skins.
- Define which skins are available.
- Select which pages are visible.
- Select which pages are available for the group.
- Select the default layout of the portlets for each page.
- Select which portlets are visible.
- Select which portlets are available to the group.
- Access the Entitlements and Attributes section. This section is described in "Attributes and Visitor Entitlements" on page 3-14.

Select Skins

To learn about the group skins functionality, do the following:

1. On the Group Portal Management Home page, click Select Skins in the right column. Alternately, you can click Skins in the left menu column. The Select Skins page appears as shown in Figure 3-4.

Figure 3-4 Portal Management Home—Select Skins



On this page, you can define which skins are available to the group and which skin is the default skin. You can also change the names of the skins. Unused skins are not visible to the group. Notice that the left menu column displays the current group portal parameters. Selecting skins in Portal Management works just like it does in the Visitors Options section "Changing the Color Theme of Your Portal" on page 2-5.

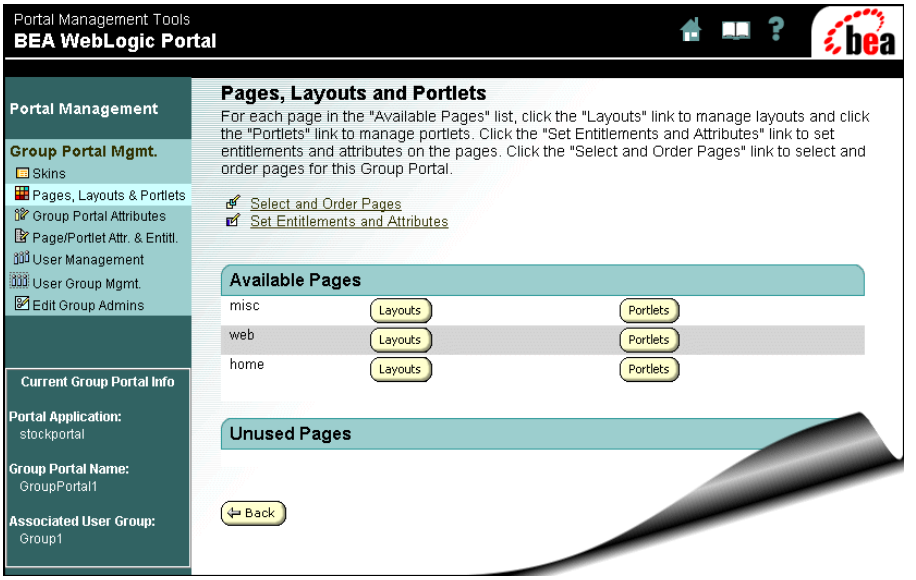
2. Return to the Group Portal Management Home by clicking the Group Portal Mgmt. link near the top of the left menu column.

Manage Pages, Layouts, and Portlets

To learn about managing pages, layouts, and portlets, do the following:

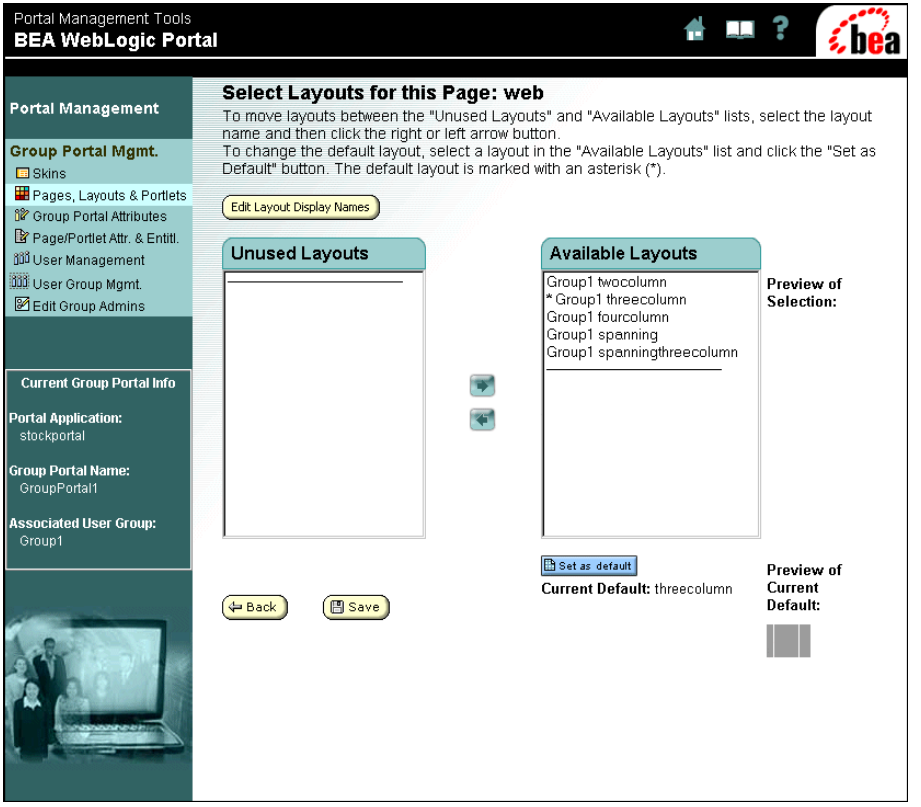
1. On the Group Portal Management Home page, click Manage Pages, Layout and Portlets in the right column. Layouts and Portlets page appears as shown in Figure 3-5.

Figure 3-5 Portal Management Home—Pages, Layouts and Portlets



2. To view the layout for a page, click one of the Layouts buttons. Select Layouts for this Page appears, as shown in Figure 3-6.

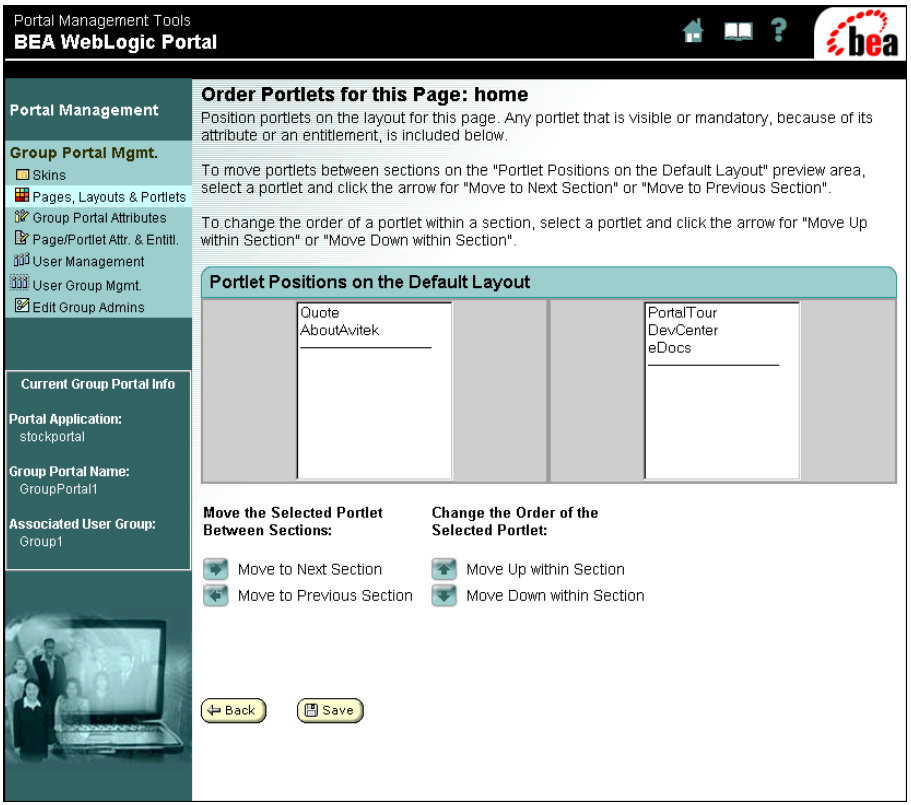
Figure 3-6 Portal Management Home—Select Layouts for this Page: web



Layouts on this page work just like they do in the Visitor Options section "Changing the Layout of a Page" on page 2-10. Notice the Edit Layout Display Names button. Clicking this button allows you to change the names of the layouts.

3. To return to the Pages, Layouts and Portlets page, click the Back button.
4. View the portlets for the *home* page by clicking its Portlets button. Order Portlets for this Page: home appears, as shown in Figure 3-7.

Figure 3-7 Portal Management Home—Order Portlets for this Page: home

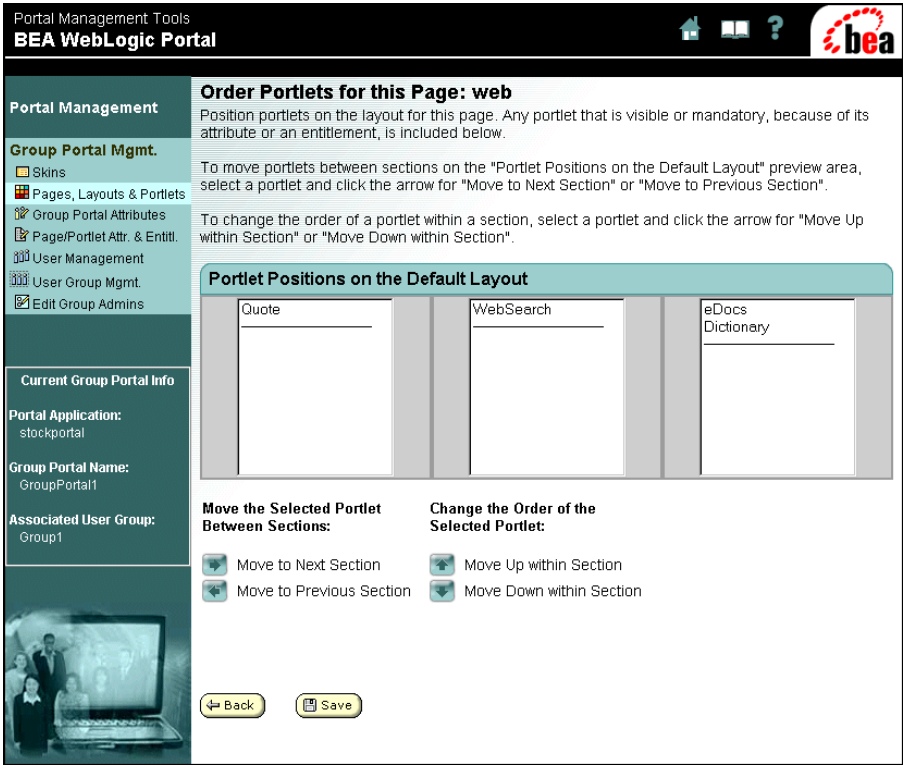


Notice that the Portlets Placed on Layout section contains two groups of portlets. This reflects the two column layout for the page, which is its current default.

5. Click the Back button, and then click the Portlets button for the *web* page. Order Portlets for this Page: web appears, as shown in Figure 3-7.

   Note: If you receive a message about portlet positions, click OK.

Figure 3-8 Portal Management Home—Order Portlets for this Page: web



Notice that Portlets Positions on the Default Layout section now contains three groups of portlets. This reflects the default three column layout for the *web* page. (If you have changed the layout for this page, it will reflect the layout that you selected.)

Note: Unplaced Portlets are automatically placed when the page is rendered.

This page works the same way as changing the visible portlets and their arrangement in the Visitor Options section "Changing Which Portlets You Can See" on page 2-12.

6. Click the back button. The Pages, Layouts and Portlets page appears.

Two more options are available on this page. The Select and Order Pages link opens a page where you can choose which pages are available to the group and the groups default home page. The selection process is the same as it was in "Changing Which Pages Are Visible" on page 2-8.

The Set Entitlements and Attributes option is discussed in "Attributes and Visitor Entitlements" on page 3-14.

7. Return to the Group Portal Management Home by clicking the Group Portal Mgmt. link near the top of the left menu column.

Attributes and Visitor Entitlements

In this category, you can do the following:

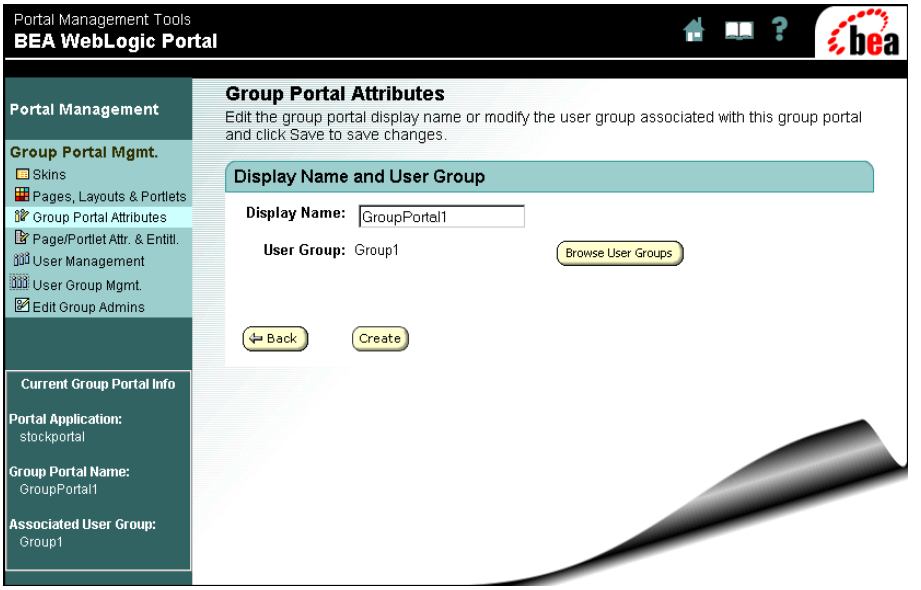
- Change the name of the group, which is the name that is displayed in the title bar of a Web browser.
- Associate a user group with the portal.
- Set page attributes. This includes which pages are available; which pages are visible; and which pages must be displayed, regardless of visitor preferences.
- Set portlet attributes. This includes which portlets are available; which portlets are visible; and which portlets must be displayed, regardless of visitor preferences.

Group Portal Attributes

To learn about the Group Portal Attributes, do the following:

1. On the Group Portal Management Home page, click the Group Portal Attributes link in either column. The page opens, as shown in Figure 3-9.

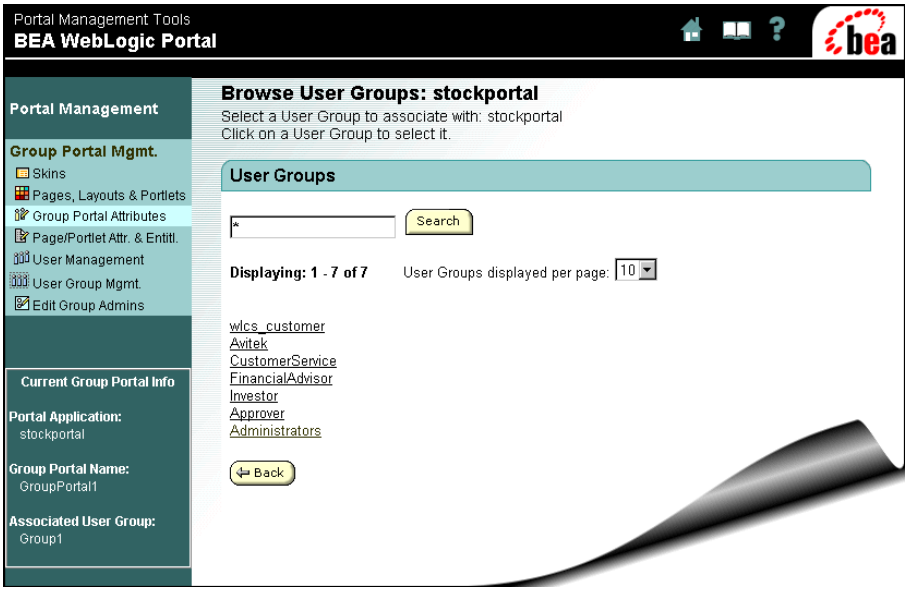
Figure 3-9 Portal Management Home—Group Portal Attributes



On this page, you can change the name that is displayed for the group.

2. Click the Browse User Groups button. The Browse User Groups page opens, as shown in Figure 3-10.

Figure 3-10 Portal Management Home—Browse User Groups: stockportal



On this page, you can assign a user group to a portal group. A user group is a list of users that have been defined in the User Management Administration Tools. For more information, see "Creating and Managing Users" in the *Guide to Building Personalized Applications*.

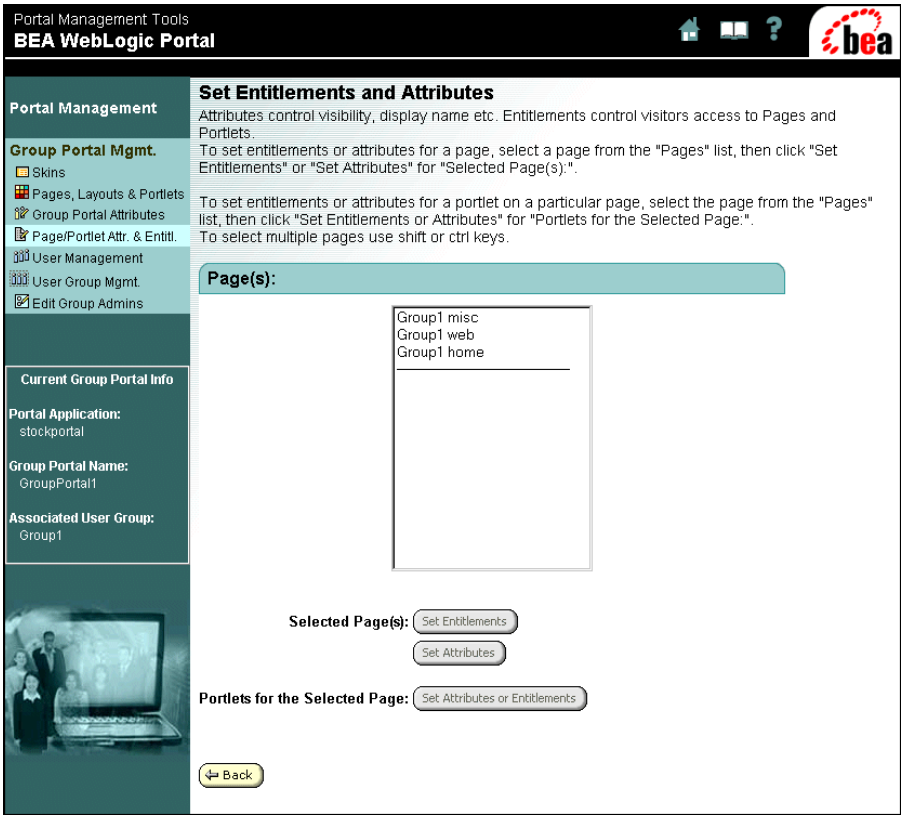
3. Return to the Group Portal Management Home by clicking the Group Portal Mgmt. link near the top of the left menu column.

Page and Portlet Attributes and Visitor Entitlements

To learn about setting entitlements and attributes, do the following:

1. On the Group Portal Management Home page, click the Page and Portlet Attributes and Visitor Entitlements in the right column. The Set Entitlements and Attributes page appears, as shown in Figure 3-11.

Figure 3-11 Portal Management Home—Set Entitlements and Attributes

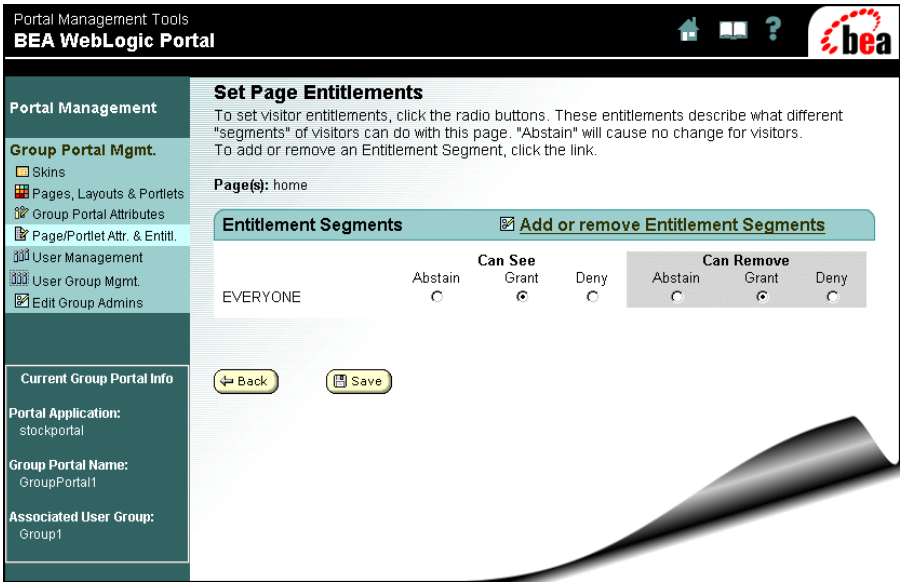


Attributes control which pages and portlets a user can see and which pages they can remove.

Entitlements control visitor access to pages and portlets. Additionally, they define what a visitor can and cannot change. When you specify entitlements, you are specifying a set of privileges for a visitor group. This type of visitor group is called an entitlement segment. Entitlements use a rules framework that match groups (based on common characteristics) with content. For more information about rules, see "Introducing the Rules Framework" in the *Guide to Building Personalized Applications*.

2. Select one of the pages from the Page(s) list, and then click the Set Entitlements button next to Selected Page(s). The Set Page Entitlements page appears, as shown in Figure 3-12.

Figure 3-12 Portal Management Home—Set Page Entitlements



The right column of this page shows one group (Everyone) under Entitlement Segments and its corresponding row of radio buttons, which define the entitlements for the group. Entitlement segments are based on a set of conditions and defined in the E-Business Control Center. For more information, see "Entitlement Segments" in *Getting Started with Portals and Portlets*.

Two types of entitlement capabilities are shown in Figure 3-12. They determine which pages the members of the group can see and which pages they can remove.

Note: Another entitlement type is available for portlets; this type allows editing of a portlet.

The following list defines the meaning of each radio button:

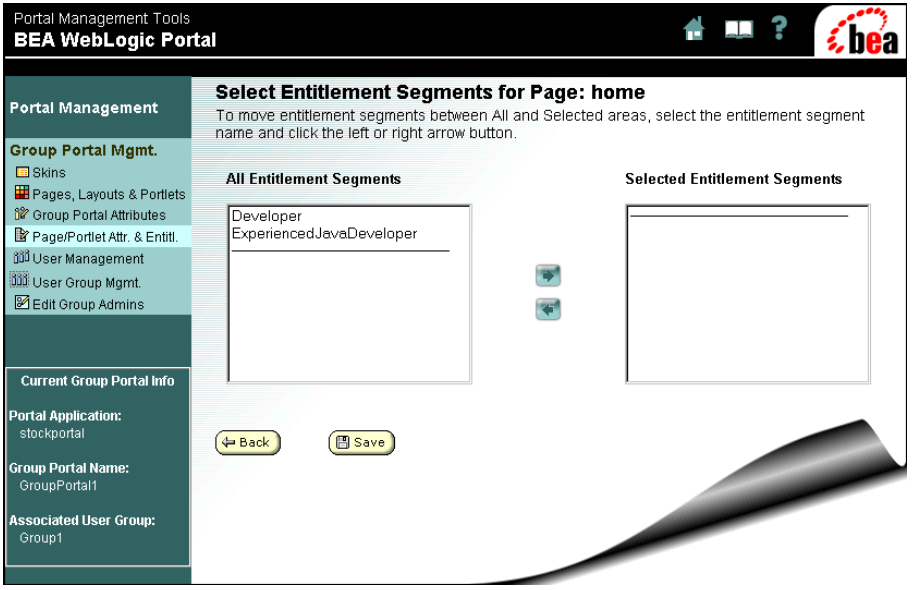
- Abstain – This means you can choose *not* to grant or deny an entitlement.

  Note: Entitlements are defined in the E-Business Control Center. Subsequently, if you select Abstain, the visibility, the editing capabilities, and the ability to remove pages will be determined by the default entitlement resource type property set in the E-Business Control Center and not by portal management.

- Grant – This means that you can allow group members to see, edit, or remove a page.
- Deny – This means that you can keep group members from seeing, editing, or removing a page.

3. Click Add or Remove Entitlement Segments. Select Entitlement Segments for Page appears, as shown in Figure 3-13.

Figure 3-13 Portal Management Home—Select Entitlement Segments for Page: home

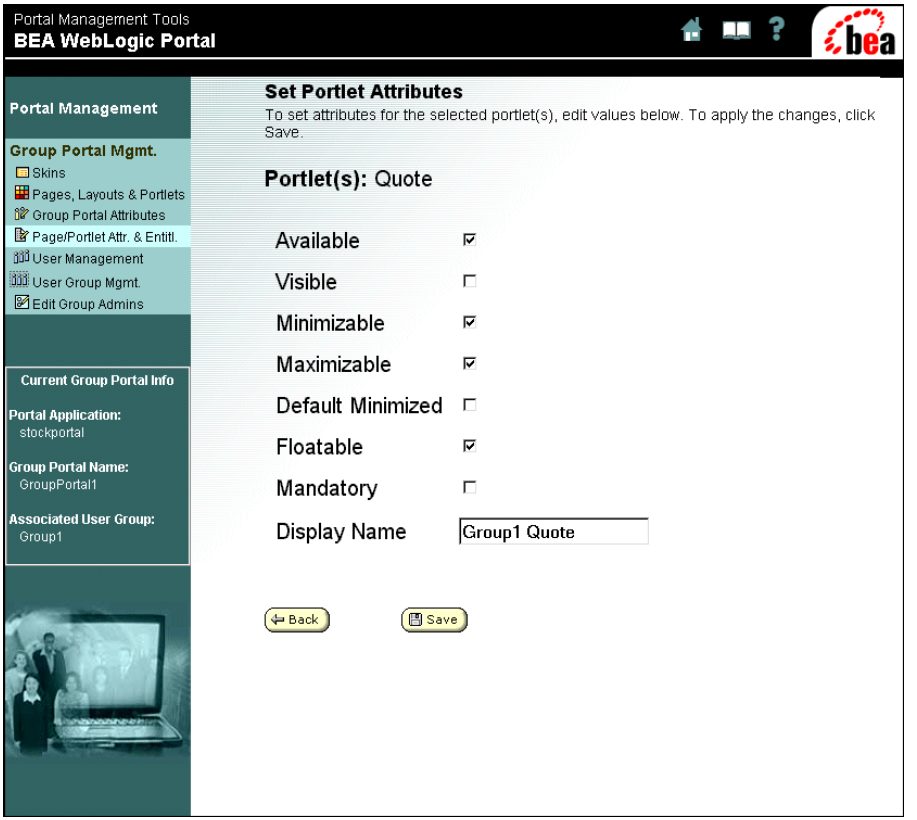


This page allows you to specify the entitlement segments for a page. The All Entitlement Segments list box contains any segments that are available for selection. The Selected Entitlement Segments list box contains any selected segments.

4. Click the Back button until you return to the Set Attributes and Entitlements page.
5. On the Set Attributes and Entitlements page, select one of the pages from the Page(s) list, and then click the Set Attributes or Entitlements button next to Portlets for the Selected Page.

6. On the Set Entitlements and Attributes for Portlets of Page, select one of the portlets from the Portlets of Page list, and then click the Select Attributes button. The Set Portlet Attributes page appears, as shown in Figure 3-14.

Figure 3-14 Set Portlet Attributes



The following list defines the meaning of each checkbox:

- Available – Select to make the portlet available for viewing.
- Visible – Select to make the portlet visible to the visitor.
- Minimizable – The portlet can be minimized.
- Maximizable – The portlet can be maximized.
- Default Minimized – The portlet is initially rendered minimized.

- Floatable – The portlet can be viewed in its own window.
- Mandatory – Overrides all customized settings such as visible.
- Display Name – You can change the name of the portlet in this field.

7. Return to the Group Portal Management Home by clicking the Group Portal Mgmt. link near the top of the left menu column.

User and Group Management

In this category, you can do the following:

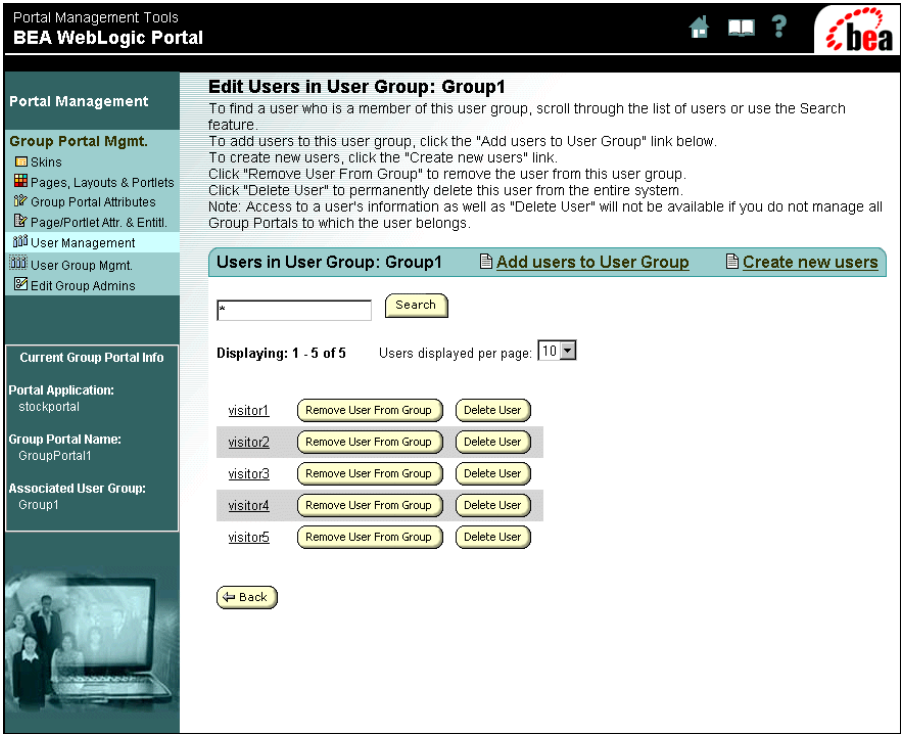
- View, edit, remove, and create visitors in a group.
- View and edit properties for the user group associated with the portal group.

User Management

To learn about user management, do the following:

1. On the Group Portal Management Home page, click the User Management link in the right column. The Edit Users in User Group page appears, as shown in Figure 3-15.

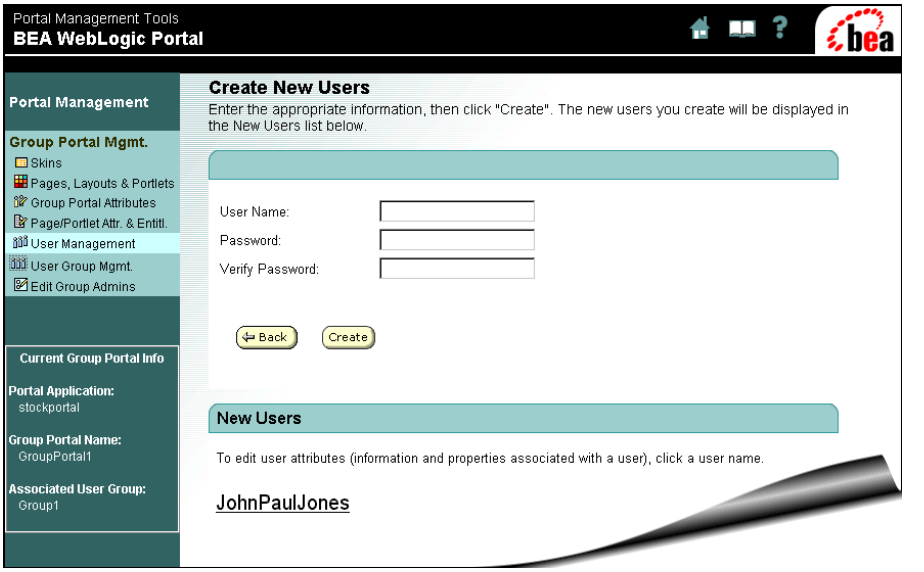
Figure 3-15 Portal Management Home—Edit Users in User Group: Group1



On this page, you can add and remove users from a group, create new users, and delete users from a user group. The buttons and links on this page have the following functions:

- Remove User From Group button – Removes the corresponding user from the group.
- Delete User button – Permanently removes the user from the entire system.
- Add Users to User Group link – Opens a page where you can select users from a list.
- Create New Users link – Opens a page where you add new users to the group and specify their passwords, as shown in Figure 3-16.

Figure 3-16 Portal Management Home—Create New Users



After the name and password for a new user is created, the name of the user appears under the New Users section.

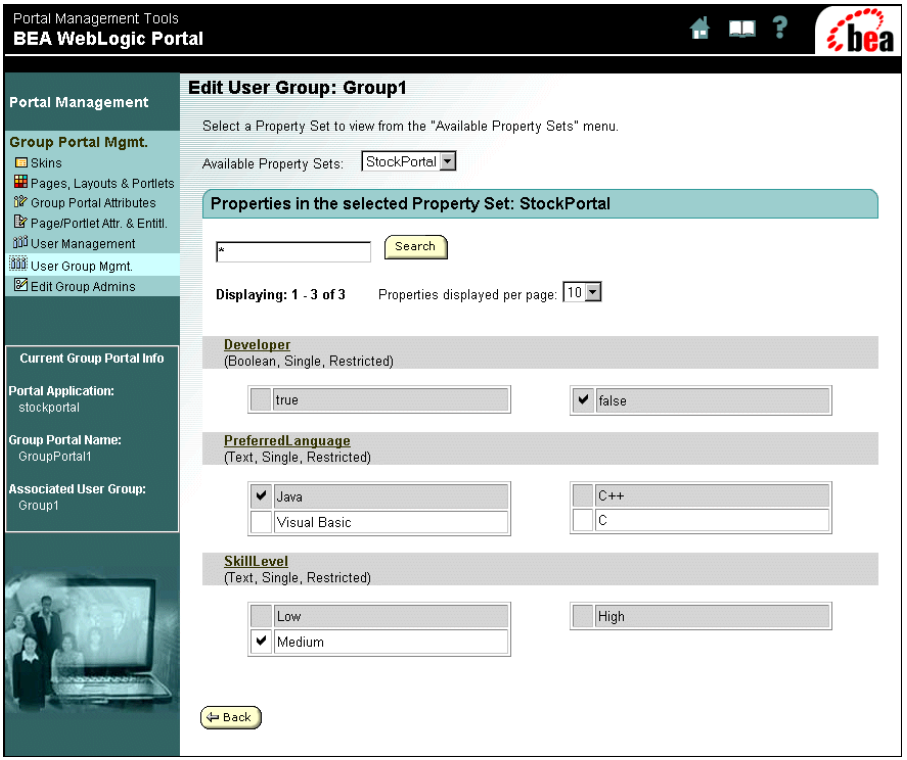
2. Return to the Group Portal Management Home by clicking the Group Portal Mgmt. link near the top of the left menu column.

User Group Management

To learn about user management, do the following:

1. On the Group Portal Management Home page, click User Group Management in the right column. The Edit User Group page appears, as shown in Figure 3-17.

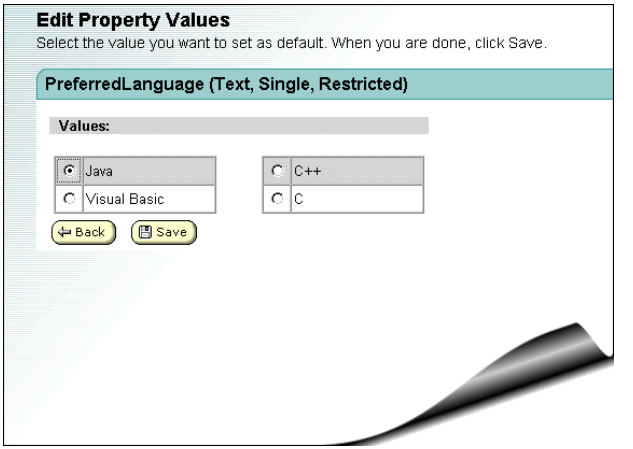
Figure 3-17 Portal Management Home—Edit User Group: Group1



This page shows the properties for a user group, where you can enter the values for the properties. These properties themselves are defined in the E-Business Control Center. For more information, see "Creating and Managing Property Sets" in the *Guide to Building Personalized Applications*.

2. To set a property value, click one of the links in the right column. The Edit Property Values page opens, as shown in Figure 3-18.

Figure 3-18 Portal Management Home—Edit Property Values



3. Return to the Group Portal Management Home by clicking the Group Portal Mgmt. link near the top of the left menu column.

Delegated Administration

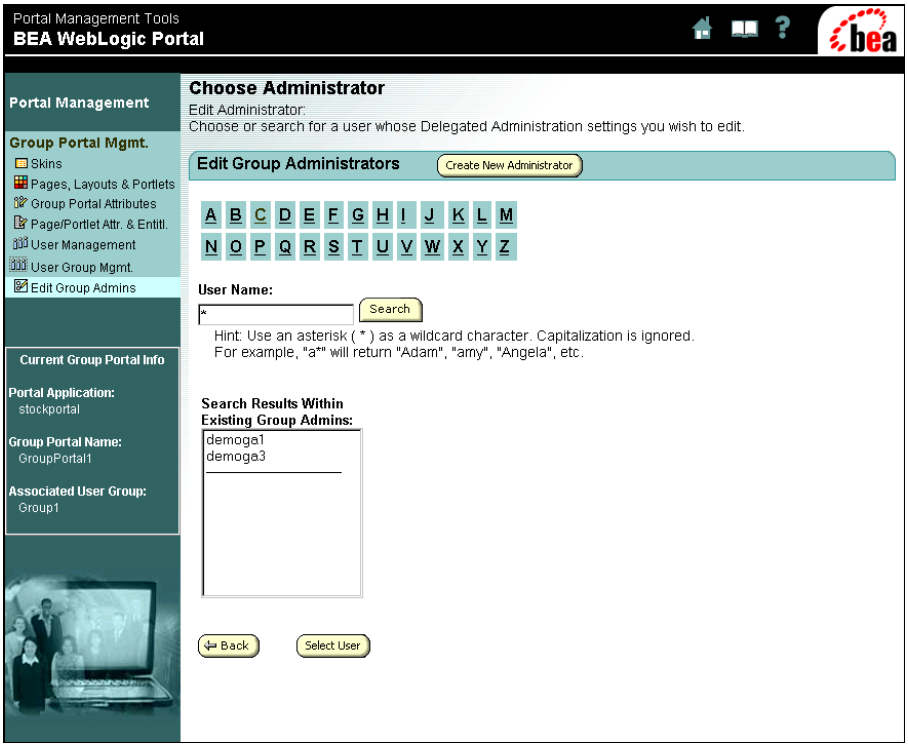
In this category, you can do the following:

- Delegate privileges to other administrators so they can determine the look-and-feel of their portal pages, control their portlets, manage their users, and set entitlements for their users and administrators.
- Add a new administrator.

To learn about delegated administration, do the following:

1. On the Group Portal Management Home page, click Edit Delegated Administration Settings for Group Administrators in the right column. The Choose Administrator page opens, as shown in Figure 3-19.

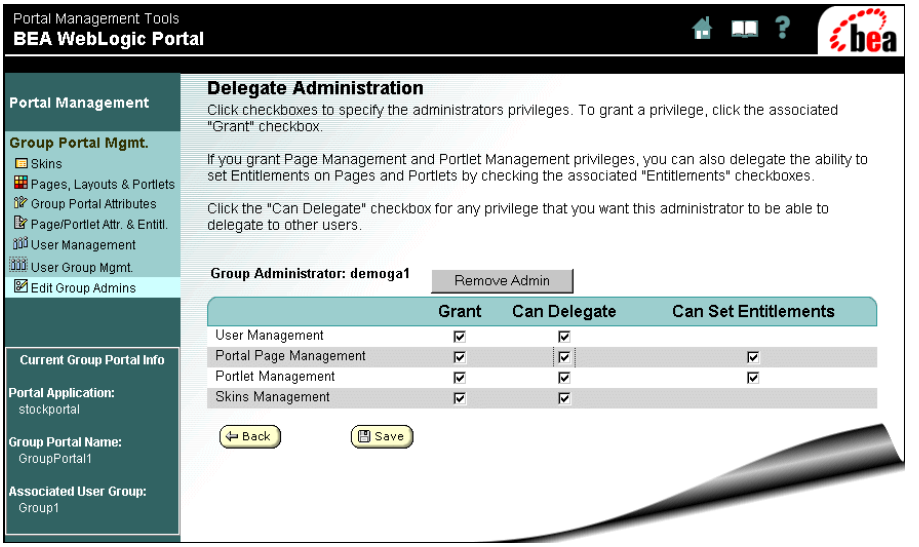
Figure 3-19 Portal Management Home—Choose Administrator



This page allows you to create a new administrator and choose the administrator whose delegation setting you want to change. You can use the alphabetical buttons to quickly display the list of users names that begin with the selected letter.

2. In the Search Results Within Existing Group Admins list, select a name, and then click the Select User button. The Delegate Administration page opens, as shown in Figure 3-20.

Figure 3-20 Portal Management Home—Delegate Administration



On this page, you can select checkboxes to specify administrators privileges. If you grant privileges for Page Management or Portlet Management, you can also delegate the ability to set entitlements on pages and portlets by selecting the associated Entitlements checkboxes.

3. Click the back button to return to the Choose Administrator window.

The Create New Administrator button opens a window just like displayed in Figure 3-19, where you can choose from a list of existing administrators. If the person you want to set administrative privileges for is not on the list, you must first designate them as an administrator. For more information on designating a user as an administrator, see "Portal Administration Tools" in *Getting Started with Portals and Portlets*.

4. Return to the Group Portal Management Home by clicking the Group Portal Mgmt. link near the top of the left menu column.

What's Next

This concludes the Tour of the Stock Portal. To learn more about the portal features of WebLogic Portal, see the other chapters in the *Getting Started with Portals and Portlets*.

To learn more about WebLogic Portal documentation in general, start with the "Documentation Roadmap for WebLogic Portal" in *Strategies for Developing E-Business Web Sites*.

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