BEA WebLogic Portal

Portal Example Portlet Features and Functionality

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Portal Example—Portlet Features and Functionality

Part Number	Date	Software Version
N/A	July 12, 2002	WebLogic Portal 7.0

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Preface

Welcome to the Portal Example—Portlet Features and Functionality tour. In addtion to this document, we encourage you to use the following resources, as well.

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CHAPTER

1 About the Tour

Welcome to the Portal Example—Portlet Features and Functionality tour. This tour is based on a fictitious Web site called Avitek Financial Services. Avitek Financial Services is a retail financial portal that provides a single point of access to several kinds of visitors, such as guests, investors, and financial advisors. Avitek Financial Services provides various kinds of business content, applications, and services from both internal and external sources. Additionally, the content is personalized for each type of visitor.

Avitek Financial Services contains several marketing campaigns, the ability to trade stock, and the ability author and review newsletters; it contains specific portlets for investors to access company profiles, service requests, and newsletters written by their financial advisors; and it contains convenience portlets such as Dictionary, Bookmarks, Stock Quotes, and WebSearch.

The tour shows you every portlet in the Avitek Financial Services and demonstrates various possibilities in portlet design and content. This tour is *not* intended to demonstrate portal functionality. To familiarize yourself with portal functionality, please take the *Portal Example—Visitor and Administrator Features* tour at http://edocs.bea.com/wlp/docs70/ptour/index.htm.

You can take this tour in the order it is presented or simply go to the portlet your interested in and follow the instructions. **The password for all predefined visitors (visitor1–visitor10) is "password"**. This tour provides descriptions and instructions for accessing and using each Portal Example portlet and provides information about underlying processes, the location of its Java and JavaServer Pages (JSP), and other pertinent information, such as whether a portlet is part of a marketing campaign.

Starting the Tour

Before you begin the tour, make sure the following are installed:

- WebLogic Server 7.0
- WebLogic Portal 7.0, including Portal Examples

To begin the tour you need to first start the server and then launch the Portal Example.

1. Start the WebLogic Portal as follows:

   Windows: Start Menu →Programs →BEA WebLogic Platform 7.0 →WebLogic Portal 7.0 →Portal Examples →Portal Example →Launch Portal Server

   UNIX: Run `<install directory>/weblogic700/portal/samples/portal/sampleportalDomain/startSamplePortal.sh`

2. After WebLogic Portal is running, start the Portal Example as follows:

   Windows: Start Menu →Programs →BEA WebLogic Platform 7.0 →WebLogic Portal 7.0 →Portal Examples →Portal Example →Start Portal Example

   UNIX: Log on to the Portal Example 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/sampleportal/index.jsp
   ```

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

You are now ready to begin touring Avitek Financial Services.

2 Overview of the Portlets

This topic provides an overview of the Avitek Financial Services portlets, outlines the different visitor types, briefly discusses each portlet, and provides a description of portlet controls. It contains information on the following subjects:

- Portlet Overview
- Group Portals, Roles, Visitors, and Passwords
- Portlet Controls

Portlet Overview

As previously mentioned, the Avitek Financial Services portal contains a wide variety of portlets. Table 2-1 provides a short description of each portlet.

Table 2-1 Overview of the Avitek Financial Services Portlets

Portlet	Description	Available To	Page
QuickLinks	Provides useful links and information such as login and logout, group and role membership, and update profile.	Everyone	Home

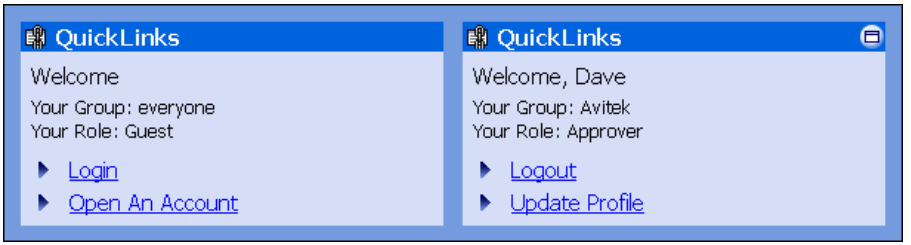
Portlet	Description	Available To	Page
WhatsHot	Displays the number of times each each campaign ad and company in the CompanyProfiles portlet is clicked. You can also display this portal's content in an Excel spreadsheet.	Visitors 1–10	Home
CompanyProfiles	Displays links to HTML documents that show company information.	Visitors 1–10	Home
MyToDo	Provides a To Do list for personal activities.	Visitors 1–10	Home
GroupToDo	Provides a To Do list for a group.	Visitors 1–10	Home
Portfolio	Displays the visitor's stock symbols, number of shares, and value. Also provides the ability to trade stock.	Visitors 1–10	Home
Newsletters	Displays newsletters to an investor visitor. The particular newsletters a visitor sees matches that visitor's user profile. The newsletters are written by the visitor's assigned financial advisor.	Visitors 4–7	Home
MyNewsletters	Displays newsletters authored by the current visitor and their approval status. You can also author newsletters in this portlet.	Visitors 2– 3	Home
ReviewNewsletters	Displays the newsletters written by the financial advisors that are waiting for approval, rejection, or removal.	Visitor 1	Home

Portlet	Description	Available To	Page
CustomerService	Provides a means for entering a customer service request. This portlet demonstrates integration with the JCA sample database adaptor provided with WebLogic Server 7.0.	Visitors 1–10	Home
CustomerService (Service Representative View)	Displays all service requests to the Customer Service Representative.	Visitor 5	Home
Email	Displays the subject lines for each message in visitor's e-mail inbox.	Visitors 1–10	Home
WorldNews	Connects to external sites that provide RSS (Rich Site Summary) information, retrieves news topics based on visitor preference, and displays them as clickable links.	Visitors 1–10	Web
Dictionary	Looks up the definition of a word by connecting to the Merriam-Webster Web site.	Everyone	Web
Quote	Provides a stock information from Yahoo! Finance.	Everyone	Web
WebSearch	Web search through Yahoo!, Excite, or Google.	Everyone	Web
Bookmarks	Provides the ability to create and maintain a list of Web site links.	Visitors 1–10	Web

Group Portals, Roles, Visitors, and Passwords

Group Portals The Avitek Financial Services portal has two group portals: the Avitek group portal and the default group portal. (The default group portal was automatically generated when the Avitek Financial Services portal was created.) Group portals are different configurations of a portal. Each group portal has a specified user group and allows delegation of privileges among administrators. For most of this tour and within the application, the group portals are usually referred to by their user group name, as shown in the QuickLinks portlet (Figure 2-1).

Figure 2-1 Group and Roles



Visitors and roles The Avitek Financial Services portal has ten predefined visitors (visitor1, visitor2 ... visitor10). Every visitor belongs to a group and a role. The portlets displayed to a particular visitor depend on that visitor's group membership and role. Each group and role has different capabilities and privileges. To see the functionality of the various portlets, you need to switch visitor types.

Note: Roles also determine which Entitlement Segments a visitor belongs to. For example, a visitor whose role is *Investor* is placed in the Investor Entitlement Segment. Entitlement Segments and their default values are defined in the E-Business Control Center. The values (properties) for a particular visitor is set in the WebLogic Portal Administration Tools. For more information about Group Portals and Entitlement Segments, see "Portal Management" in the *Portal Example—Visitor and Administrator Features* tour at http://edocs.bea.com/wlp/docs70/ptour/portmgm.htm# and the E-Business Control Center online help.

Passwords All predefined visitors use the same password, which is "password" and is case sensitive.

The following list describes the effect of each group and role on portlet availability:

- Everyone Group, Guest Role—These portlets are displayed to everyone regardless of group membership and role.
- Avitek Group—These portlets are displayed to visitors that belong to the Avitek group. Visitor 1–10 all belong the Avitek group. This group has the following roles:
  - Approver Role—Provides the ability to reject, approve, or delete newsletters written by financial advisors.
  - Financial Advisor Role—Provides the ability to write newsletters.
  - Investor Role—Provides the ability to read newsletters written by a particular financial advisor.
  - Guest Role—Provides the ability to view and use all portlets except the Newsletter portlets.

Table 2-2 Visitor, Group, and Role Associations

Visitor	Group	Role	Password (case sensitive)
Everyone	Everyone	Guest	None
Visitor 1	Avitek	Approver	password
Visitor 2	Avitek	Financial Advisor	password
Visitor 3	Avitek	Financial Advisor	password
Visitor 4	Avitek	Investor	password
Visitor 5	Avitek	Investor CustomerServiceRep	password
Visitor 6	Avitek	Investor	password
Visitor 7	Avitek	Investor	password
Visitor 8	Avitek	Guest	password
Visitor 9	Avitek	Guest	password
Visitor 10	Avitek	Guest	password

Portlet Controls

Portlet controls allow you to use portlets. For example, a portlet may have more than one view; it 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 Enterprise JavaBeans (EJB) components or other application functionality within the application server. The controls for portlets in the Avitek Financial Services portal are listed in Table 2-3.

Table 2-3 Portlet Controls

Button	Name	Description
	Help	Opens a Help window.
	Maximize	Maximizes the portlet to the full width of the browser window.
	Unmaximize	Returns a maximized portlet to its original size.
	Edit	Opens the portlet for editing.
	Finished	Closes the portlet from editing.
	Float	Opens the portlet in a separate browser window.
	Minimize	Minimizes the portlet so that only the Title is displayed.
	Restore	Returns the minimized portlet to its original size.

3 Avitek Financial Services Pages

The Avitek Financial Services portal has two pages: the Home page and the Web page. These portal pages contain all the portlets in Avitek Financial Services and are described in detail in the following sections:

- Home Page
  - Home Page—Visitor Not Logged In
  - Home Page—Visitor Logged In
- Web Page
  - Web Page—Visitor Not Logged In
  - Web Page—Visitor Logged In

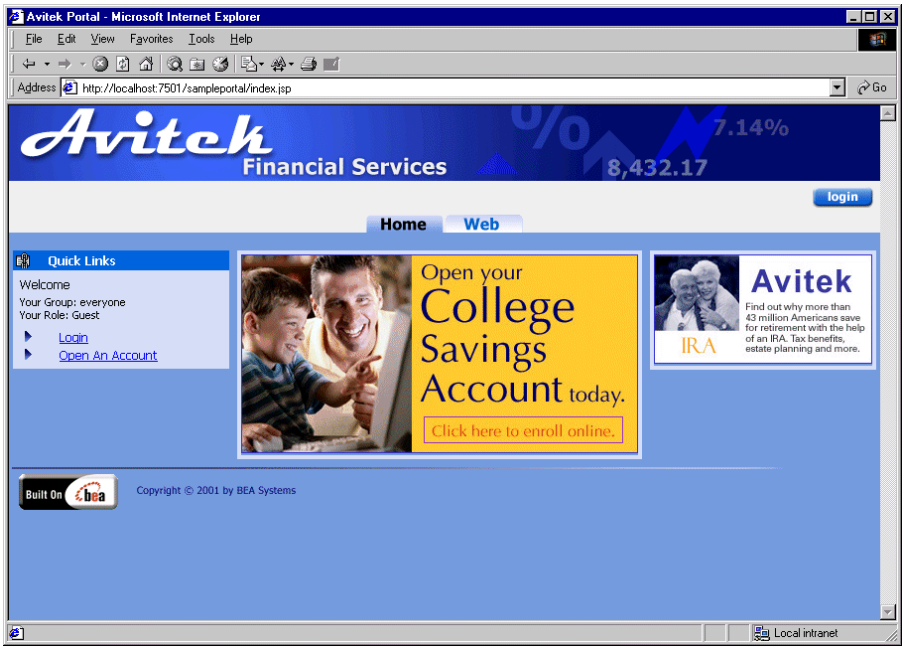
Home Page

The contents of the Home page depend on whether a visitor is logged in and on the visitor's group membership and role. The following sections illustrate these differences.

Home Page—Visitor Not Logged In

The default Home page, shown in Figure 3-1, appears before a visitor logs in. The default Home page contains three portlets. The College Savings Account and Avitek IRA advertisements occupy placeholders inside portlets (the PrimaryCampaign and SecondaryCampaign portlets, respectively). The content of these placeholders changes depending on which campaign is invoked. For a full discussion about the campaigns in the Portal Example, see Chapter 5, "Campaigns and Portlets."

Figure 3-1 Avitek Financial Services Home Page—Default



Home Page—Visitor Logged In

As previously mentioned, the portlets displayed on the Home page change when a visitor logs in. To see some of the other portlets displayed after login, complete these steps:

1. Click the **Login** button.
2. In the User ID field, enter “visitor10”.
3. In the Password field, enter “password”.

Note: The password for Visitors 1–10 is “password”.

4. Click the **Login** button. The Home page opens, as shown in Figure 3-2.

Figure 3-2 Avitek Financial Services Home Page—Logged In (Visitor 10)

5. Notice that Visitor 10's Home page contains eight portlets. Visitor 10 belongs to the Avitek group and the guest role. Group managers determine which portlets their members can access. For a tour about group management see "Portal Management" in *Portal Example—Visitor and Administrator Features* at http://edocs.bea.com/wlp/docs70/ptour/portmgm.htm.
6. To log out, click the **Logout** button. The Home page returns to its default configuration.

To further explore how the user role affects which portlets are displayed on the Home page, log in as other visitors—try visitor1 for the Approver role, visitor3 for the Advisor role, and visitor4 for the Investor role.

Web Page

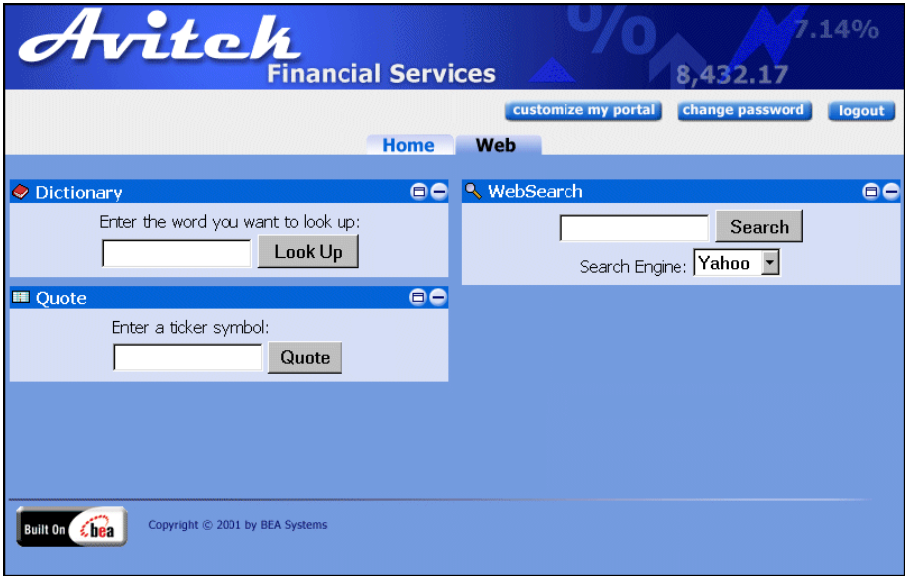
Like the Home page, the contents of the Web page also depend on whether a visitor is logged in or not. The following sections illustrate these differences.

Web Page—Visitor Not Logged In

To view the default Web page, click the **Web** tab.

The default Web page contains three portlets: Dictionary, WebSearch, and Quote. Figure 3-3 shows the Web page when a visitor has not logged in.

Figure 3-3 Avitek Financial Services Web Page—Default



Web Page—Visitor Logged In

To view the Web page when a visitor has logged in, complete the following steps:

1. Click the **Login** button.
2. In the User ID field, enter “visitor10”.
3. In the Password field, enter “password”.

Note: The password for visitor1–10 is “password”.

4. Click the **Login** button. The Home page opens.
5. Click the **Web** tab.

The Web page for Visitors 1–10 contains five portlets: WorldNews, Dictionary, WebSearch, Bookmarks, and Quote. Figure 3-4 shows the Web page for these visitors.

Figure 3-4 Avitek Financial Services Web Page—Logged In (Visitor 10)

6. To log out, click the **Logout** button. The portal displays the Home page in its default configuration.

4 The Web Page Portlets

You can use the Web page portlets to look up various kinds of information. This topic contains information about the following portlets:

- Dictionary Portlet
- Quote Portlet
- WebSearch Portlet
- WorldNews Portlet
- Bookmarks Portlet

Dictionary Portlet

The Dictionary portlet allows you to look up the definition of a word by connecting to the Merriam-Webster Web site. It is a simple JavaServer Page (JSP) application.

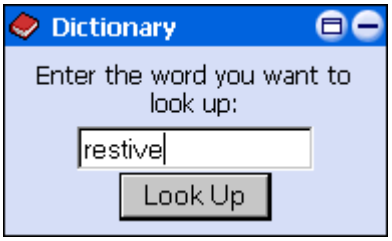
Java source: none

JSP source:
`<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/portlets/dictionary`

Note: You do not need to log in to use this portlet.

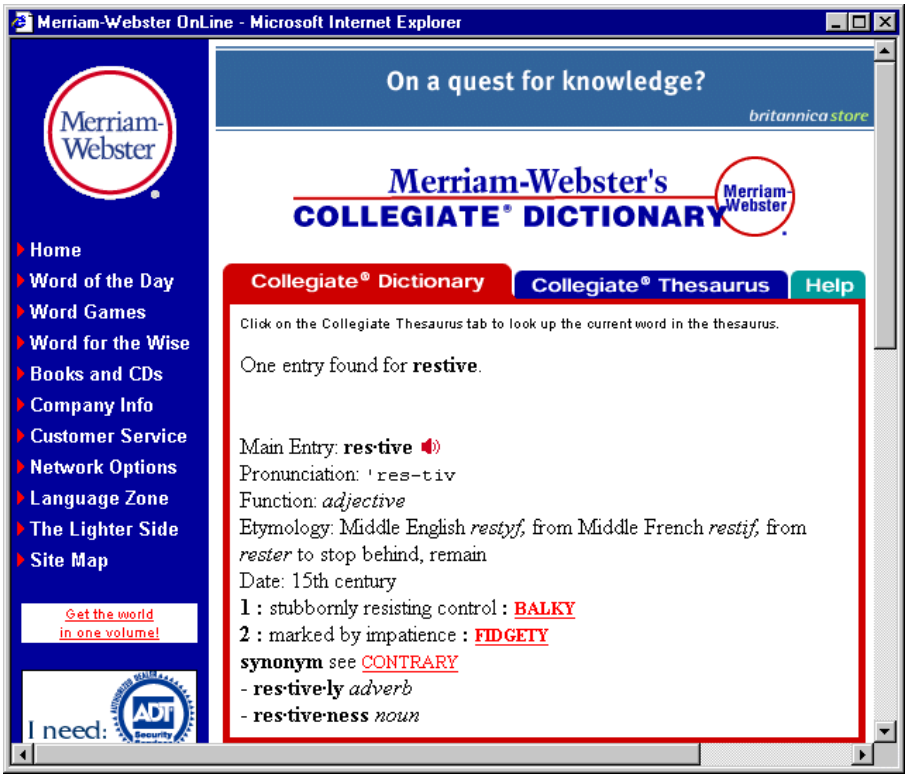
1. From the Home page, click the **Web** tab.
2. As shown in Figure 4-1, enter a word in the word field, and then click the **Look Up** button.

Figure 4-1 Dictionary Portlet



A new window opens that displays the word definition, as shown in Figure 4-2.

Figure 4-2 Dictionary Window



3. After you are done looking at the window, close it.

Quote Portlet

The Quote portlet allows you to look up a stock information from the Yahoo! Finance Web site. It a simple JSP application.

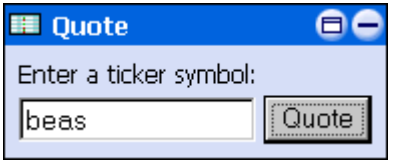
Java source: none

JSP source:
`<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/portlets/quote`

Note: You do not need to log in to use this portlet.

1. From the Home page, click the **Web** tab.
2. As shown in Figure 4-3, enter a symbol in the ticker symbol field, and then click the **Quote** button.

Figure 4-3 Quote Portlet



A new window opens that shows the selected quote information, as shown in Figure 4-4.

Figure 4-4 Quote Window

3. After you are done looking at the window, close it.

WebSearch Portlet

The WebSearch portlet allows you to search the Web through Yahoo!, Excite, or Google. It is a simple JSP application.

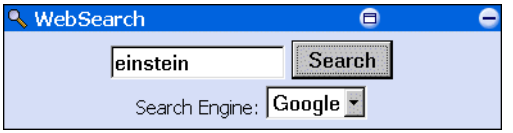
Java source: none

JSP source:
`<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/portlets/search`

Note: You do not need to log in to use this portlet.

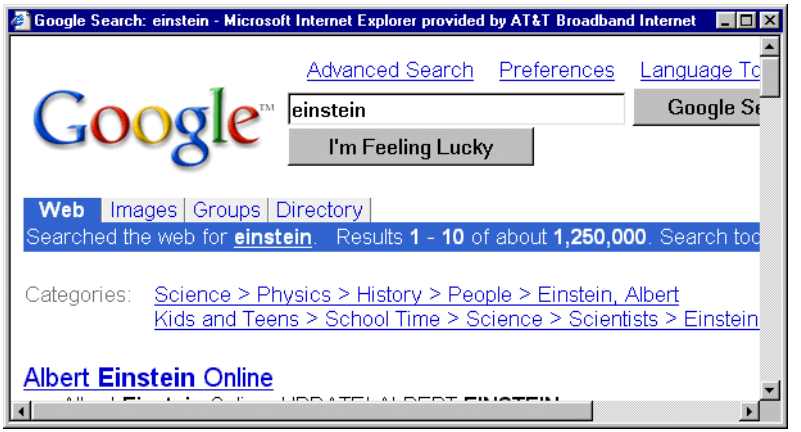
1. From the Home page, click the **Web** tab.
2. As shown in Figure 4-5, enter a search term in the field, and then click the **Search** button.

Figure 4-5 WebSearch Portlet



A new window opens showing the search results in the selected search engine, as shown in Figure 4-6.

Figure 4-6 WebSearch Window



3. After you are done looking at the window, close it.

WorldNews Portlet

The WorldNews portlet links to various news agencies on the internet and displays the new stories they publish. It retrieves news stories based on user preference and displays them as links. This portlet demonstrates the use of the WebLogic Server Extensible Markup Language (XML) and Extensible Stylesheet Language (XSL) JSP tags.

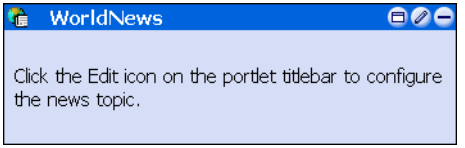
Java Source:
`<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/src/examples/sampleportal/worldnews`

JSP Source:
`<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/portlets/worldnews`

To learn how to configure the WorldNews portlet, complete the following steps:

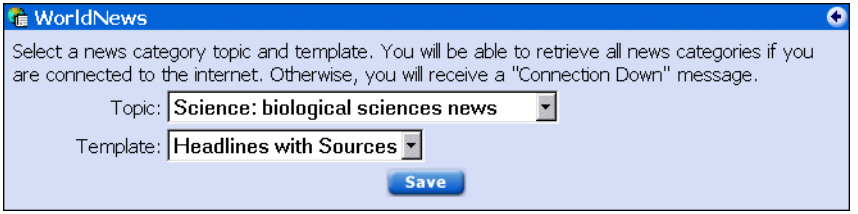
1. Log in as any visitor.
2. From the Home page, click the **Web** tab. Figure 4-7 shows the WorldNews Portlet before it has been configured.

Figure 4-7 WorldNews Portlet—Not Configured



3. Click the **Edit** button in the titlebar. The portlet maximizes and is now editable, as shown in Figure 4-8.

Figure 4-8 WorldNews Portlet—Editable

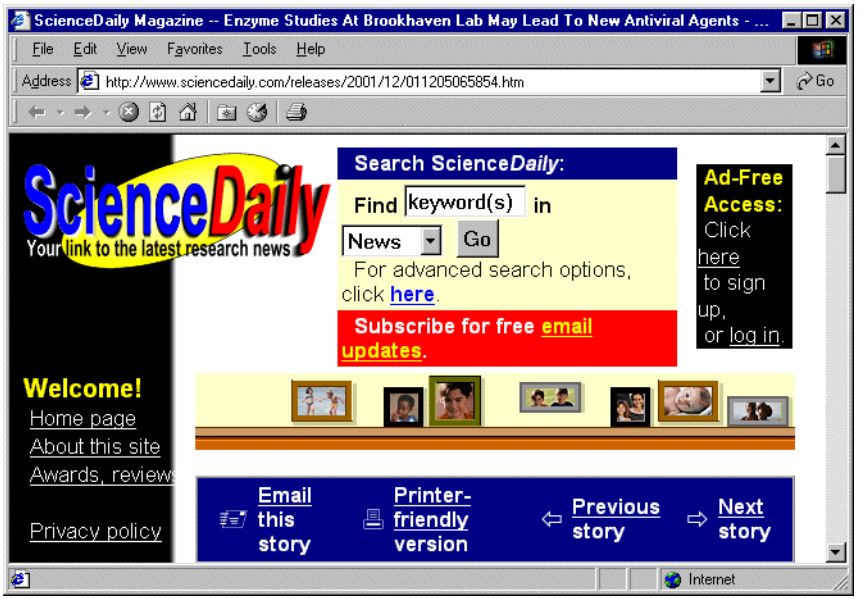


4. Select a Topic and a Template from the drop-down lists, click the **Save** button, and then click the **Finished** button. The portlet now shows the topics from the selected news source, as shown in Figure 4-9.

Figure 4-9 WorldNews Portlet—Configured

5. To view a news story, click one of the links. The story is displayed in a new browser page, as shown in Figure 4-10.

Figure 4-10 WorldNews Story Window



6. After you are done looking at the window, close it.

Bookmarks Portlet

The Bookmarks portlet provides a way for you to store the names and URLs of Web sites. After a bookmark is created, clicking the link opens the site in a new browser window. This portlet is implemented through Enterprise JavaBeans (EJB) 2.0 entity beans.

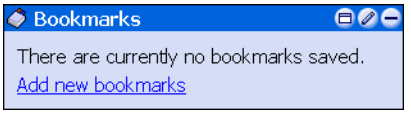
Java Source:
`<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/src/examples/sampleportal/bookmark`

JSP Source:
`<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/portlets/bookmark`

In this section, you will learn how to configure the Bookmarks portlet.

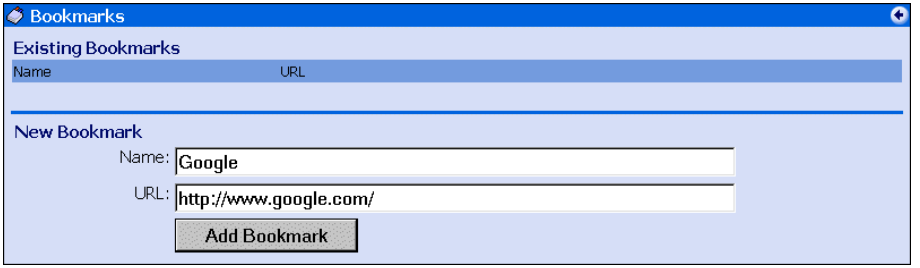
1. Log in as any visitor.
2. After the Home page appears, click the **Web** tab. The Bookmarks portlet appears, as shown in Figure 4-11.

Figure 4-11 Bookmarks Portlet—No Saved Bookmarks



3. Click **Add Bookmarks**. The portlet expands, as shown in Figure 4-12.

Figure 4-12 Bookmarks Portlet—Adding a Bookmark



4. Enter the name and URL of a Web site you frequently visit, and then click the **Add Bookmark** button. The portlet shows the added bookmark, as shown in Figure 4-13.

Figure 4-13 Bookmarks Portlet—Bookmarks Added

5. Add another bookmark, and then click the **Finished** button. The portlet returns to its original size and displays the new bookmarks, as shown in Figure 4-14.

Figure 4-14 Bookmarks Portlet—Saved Bookmarks

6. Click one of the bookmark links. The Web site opens in a new window, as shown in Figure 4-15.

Figure 4-15 Bookmarks Window

7. After you are done looking at the window, close it.

5 Campaigns and Portlets

The Avitek Financial Services portal contains five marketing campaigns, which are listed below:

- College Fund Campaign—Default campaign. It displays an advertisement in an placeholder within the PrimaryCampaign portlet on the Home page.
- Avitek IRA Campaign—Default campaign. It displays an advertisement in an placeholder within the SecondaryCampaign portlet on the Home page.
- Welcome Campaign—Sends an email when a new account is opened.
- Personal Investment Advisor Campaign—Displays an ad for the Personal Investment Advisor when investors have increased their Risk Tolerance to a value of 5.0 or greater. It replaces the ad for the College Fund Campaign.
- Avitek Credit Card Campaign—Displays an ad for the Avitek Credit Card when an investor has purchased at least $25,000 in stock and the Risk Tolerance has reached a value of 5.0 or greater. It replaces the ad for the Avitek IRA Campaign.

The portlets used in the campaigns are located on the Home page. They are discussed in the following sections:

- QuickLinks Portlet
- Portfolio Portlet
- CompanyProfiles Portlet

QuickLinks Portlet

The QuickLinks portlet provides various kinds of information and useful links, such as group membership and user role, login and logout, and risk rating. It invokes the security Webflow and sets the portfolio portlet into edit mode. For more information about Webflow and security, see "Setting Up Portal Navigation" at http://edocs.bea.com/wlp/docs70/dev/navigate.htm and "Adding Security to a Portal at http://edocs.bea.com/wlp/docs70/dev/securty.htm in the *Development Guide*.

Java Source:

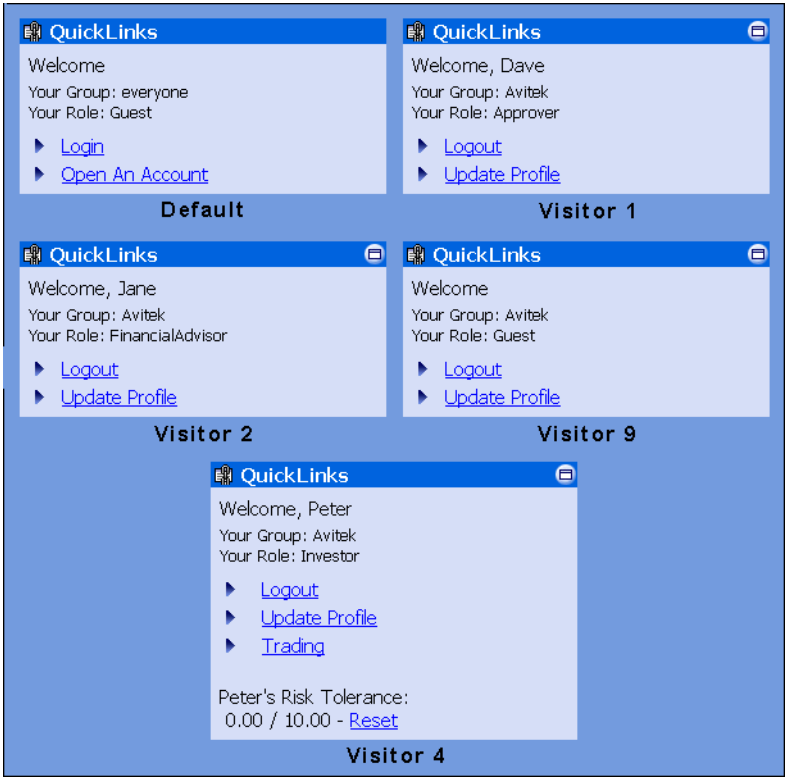
```
<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/
sampleportal/sampleportal/WEB-INF/src/examples/sampleportal/navig
ation/ip
```

JSP Source:

```
<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/
sampleportal/portlets/navigation
```

The contents of the portlet depend on the visitor's group membership. Figure 5-1 shows an example of the QuickLinks portlet for different visitors.

Figure 5-1 QuickLinks Portlet—Group Membership Differences

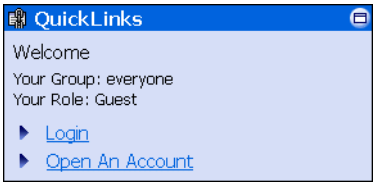


The QuickLinks portlet is part of the Welcome campaign. This campaign sends an email message welcoming new users.

To see how the Welcome campaign works, complete the following instructions:

1. If you are logged in, log out.
2. In the default QuickLinks portlet, click **Open An Account**, as shown in Figure 5-2.

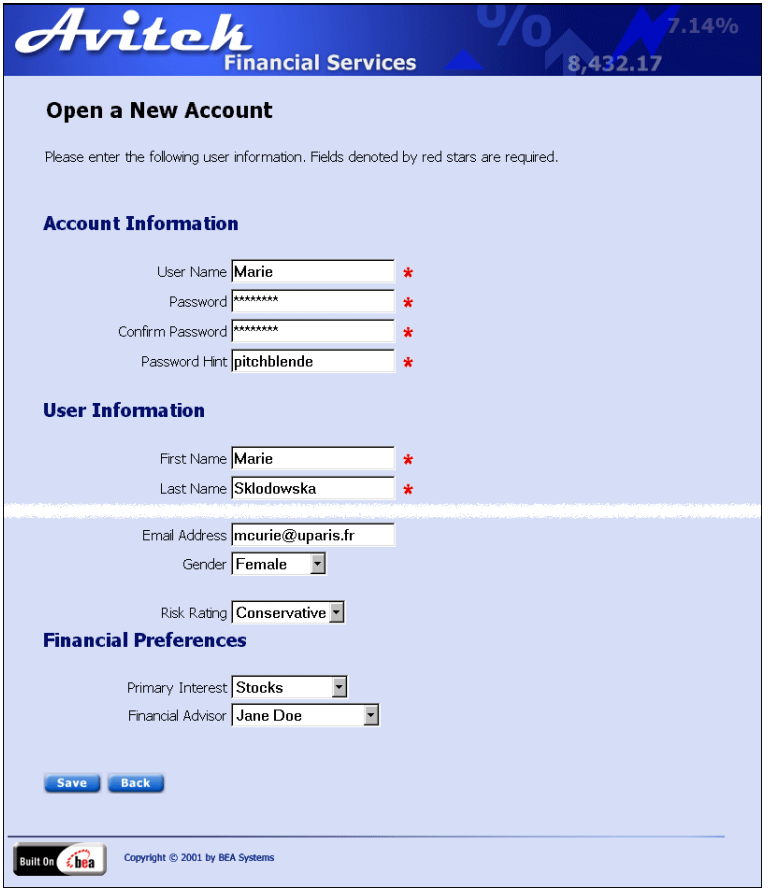
Figure 5-2 QuickLinks Portlet—Default



3. After the Open a New Account page appears, fill in the required fields and the Email Address field. Figure 5-3 shows an example.

Caution: Be sure to enter a valid email address; otherwise you will not receive the Welcome email.

Figure 5-3 Open a New Account Page

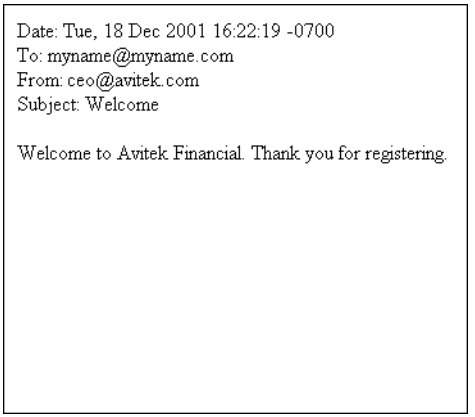


4. Click the **Save** button. The Home page returns. You are automatically logged on and the QuickLinks portlet welcomes you, as shown in Figure 5-4.

Figure 5-4 QuickLinks Portlet—New User

5. Go to your email client and view the Welcome Message from the ceo@avitek.com. Figure 5-5 shows the message.

Figure 5-5 Welcome Email Message



Note: For more information about email campaigns, see "Setting Up Campaign Services" in the *Development Guide* at http://edocs.bea.com/wlp/docs70/dev/cmpaign.htm.

6. To log out, click the **Logout** button.

Portfolio Portlet

The Portfolio portlet displays selected stock symbols, number of shares, and share value. Changes in this portlet help fulfill one of the conditions necessary to invoke the Avitek Credit Card campaign: the purchase of $25,000 in stock. The Portfolio portlet is an EJB 2.0 implementation that uses Pipelines. The information in this sample portlet is stored in a database, which can be extended to retrieve information from a real-time service. For more information about Pipelines, see "Setting Up Portal Navigation" in the *Development Guide* at http://edocs.bea.com/wlp/docs70/dev/navigate.htm.

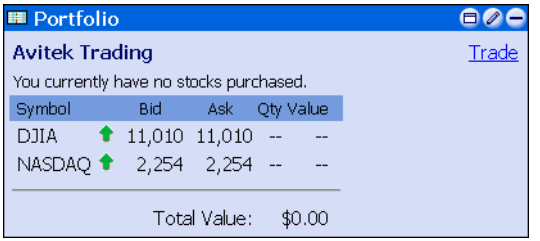
Java Source:
`<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/sampleportal/WEB-INF/src/examples/sampleportal/portfolio/ip`

JSP Source:
`<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/portlets/portfolio`

To learn about this portlet and fulfill one of the requirements of the Avitek Credit Card campaign, complete the following instructions:

1. Log in as "visitor7".
2. In the Portfolio portlet, click the **Trade** link, as shown in Figure 5-6.

Figure 5-6 Portfolio Portlet—Original (Visitor 4)



The portlet expands, as shown in Figure 5-7.

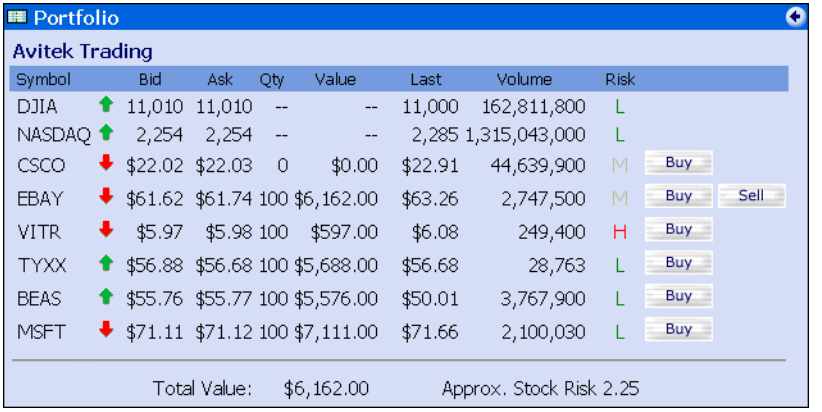
Figure 5-7 Portfolio Portlet—Expanded (Visitor 4)

3. Click any **Buy** button. A new window opens where you can buy 100 shares of the selected stock, as shown in Figure 5-8.

Figure 5-8 Portfolio Portlet—Confirm Stock Purchase Window (Visitor 4)

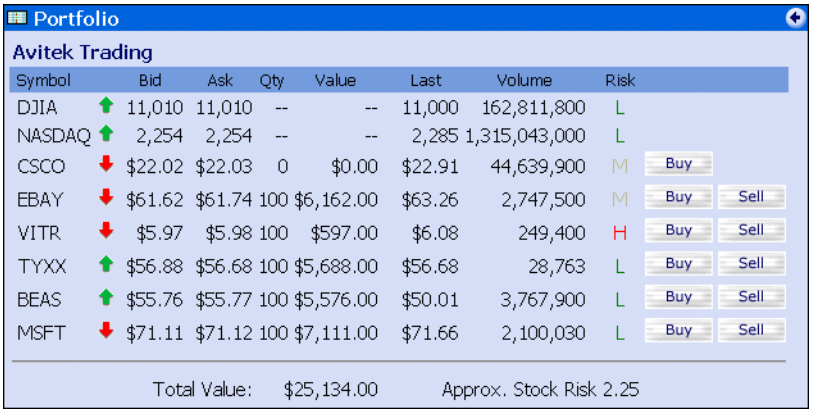
4. Click the **OK** button. The window closes and the Portfolio portlet shows the purchase, as shown in Figure 5-9.

Figure 5-9 Portfolio Portlet—One Stock Purchased (Visitor 4)



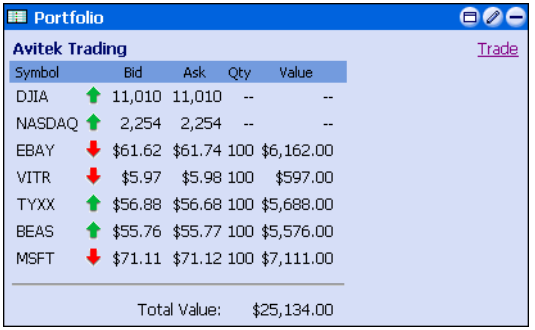
5. Continue to purchase stock until you have accumulated a total value greater than $25,000, as shown in Figure 5-10.

Figure 5-10 Portfolio Portlet—$25,000 Stocks Purchased (Visitor 4)



6. Click the **Finished** button. The portlet returns to its original size, as shown in Figure 5-11.

Figure 5-11 Portfolio Portlet—Original Size (Visitor 4)



You have now fulfilled the one of the requirement for invoking the Avitek Credit Card campaign.

CompanyProfiles Portlet

The CompanyProfiles portlet displays profiles for specific companies. This portlet is involved in two different campaigns: the Personal Investment Advisor campaign and the Avitek Credit Card campaign. These campaigns are invoked when a visitor's risk tolerance increases to 5.0 or greater. Everyone starts off as a conservative investor with a low-risk tolerance. When you click on the high-risk companies in this portlet (Juniper Networks and Micron Technology), your risk tolerance increases. The increase in risk tolerance triggers the Personal Investment Advisor campaign. The Avitek Credit Card campaign is triggered when the increased risk tolerance is 5.0 or greater and the visitor purchases at least $25,000 in stock.

The CompanyProfiles Portlet demonstrates Content Query tags.

Java source: none

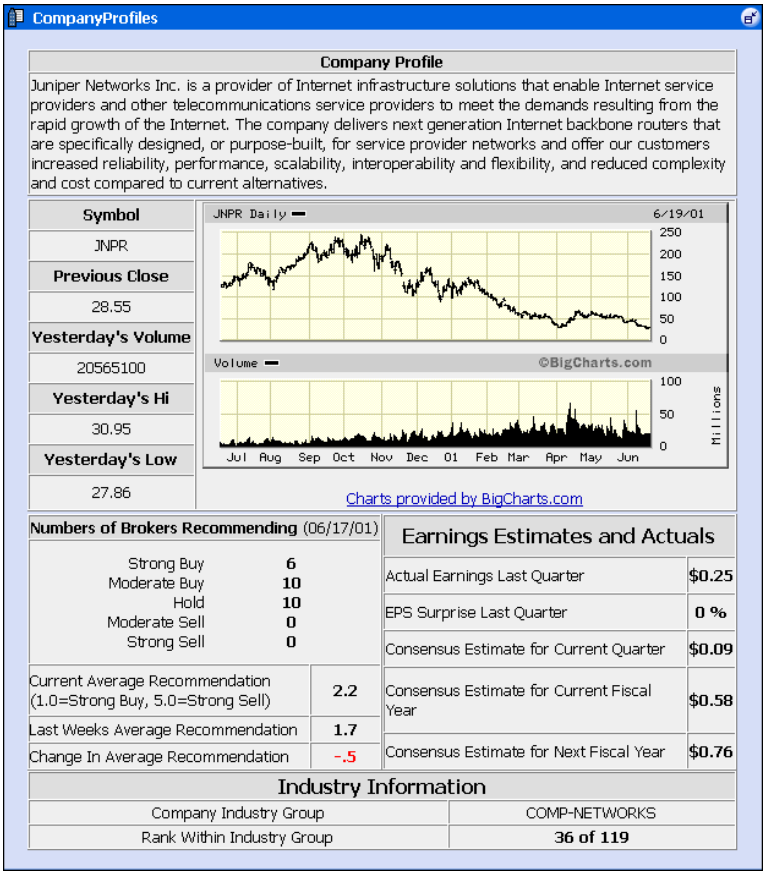
JSP source:
`<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/portlets/profile`

1. If you are not already logged in as Visitor 4, log in under that name.
2. In the CompanyProfiles portlet, click **Juniper Networks**, as shown in Figure 5-12.

Figure 5-12 CompanyProfiles Portlet (Visitor 4)

The portlets expands, as shown in Figure 5-13.

Figure 5-13 CompanyProfiles Portlet—Juniper Networks (Visitor 4)



3. Click the **Unmaximize** button. The portlet returns to its original size. Additionally, the Personal Investment Advisor and Avitek Credit Card ads have replaced the College Fund and IRA ads in the ad placeholders on the Home page, as shown in Figure 5-14.

   Note: If you have not purchased $25,000 in stock, you will not see the Avitek Credit Card ad.

Figure 5-14 Personal Investment Advisor and Avitek Credit Card Campaigns

4. Compare Figure 5-14 with Figure 5-15. Notice that the QuickLinks portlet shows that Peter's risk tolerance has increased from 3.52/10.00 to 6.40/10.00.

Figure 5-15 College Fund and Avitek IRA Campaigns

5. Log out as Visitor 4.

6 Newsletter Portlets

The Newsletter portlets show an example of collaborative Content Management. The particular Newsletter portlet displayed depends on the visitor's group membership and role. These portlets provide the ability for financial advisors to create newsletters that can then be approved and delivered by a manager (Approver) to the appropriate visitor based on personalization. The Newsletter portlets use the BEA Content Management reference implementation and native Content Management capabilities. For more information, see "Portal Content Management" in the *Development Guide* at http://edocs.bea.com/wlp/docs70/dev/conmgmt.htm.

The three types of Newsletter portlets are listed below:

- Newsletters Portlet (for Investors)—Investors can read the newsletters written by their own Financial Advisor.
- MyNewsletters Portlet (for Financial Advisors)—Financial advisors can author newsletters and submit them for approval.
- ReviewNewsletters Portlet (for Approvers)—Approvers can approve, reject, or remove the newsletters written by the financial advisors. Approved newsletters are automatically delivered to the designated investor.

Newsletters Portlet (for Investors)

Visitors 4–7 belong to the Avitek group as investors. The Newsletter portlet for investors contains a list of newsletters created by the particular visitor's financial advisor. This portlet demonstrates providing customized content through Service Provider Interface (SPI) implementation and Content Selectors. For more information about Content Selectors, see "Personalization and Interaction Management" in the *Administration Guide* at http://edocs.bea.com/wlp/docs70/admin/p13n.htm.

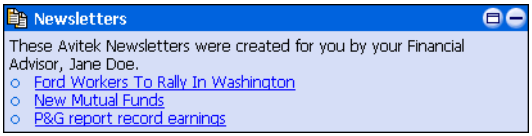
Java source:
`<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/src/examples/sampleportal/newsletter`

JSP source:
`<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/portlets/newsletter`

To learn more about the Newsletters portlet, complete the following steps:

1. Log in as "visitor7".
2. Click one of the newsletters, as shown in Figure 6-1.

Figure 6-1 Newsletters Portlet (Investor, Visitor 7)



The portlet expands to show the content of the select newsletter, as shown in Figure 6-2.

Figure 6-2 Newsletters Portlet—Review Newsletter (Investor, Visitor 7)

3. To return the portlet to its original size, click the **Unmaximize** button.
4. Log out as Visitor 7.

Note: Different investors receive access to different newsletters based on their assigned financial advisor. If you wish to see this, log in as "visitor4" and view the Newsletters portlet.

MyNewsletters Portlet (for Financial Advisors)

The MyNewsletters portlet is available to Visitors 2 and 3. This portlet contains a list of newsletters created by a financial advisor. It demonstrates providing customized content through SPI implementation and Content Management tags.

Java source:

```
<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/
sampleportal/src/examples/sampleportal/newsletter
```

JSP source:

```
<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/
sampleportal/portlets/newsletter
```

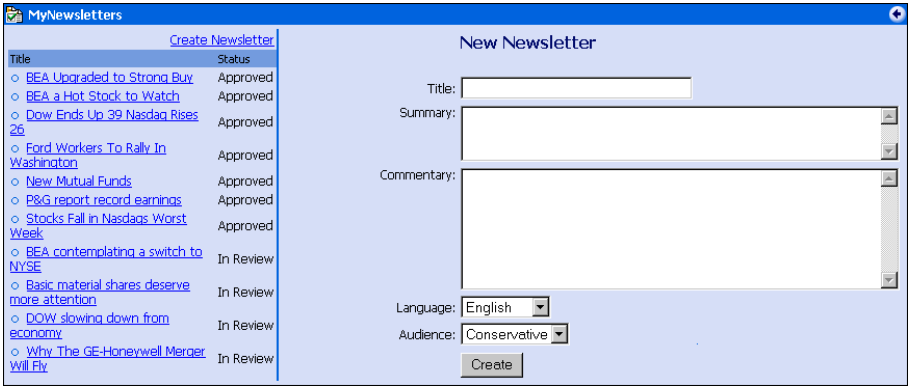
To learn about the MyNewsletters portlet, take the following steps:

1. Log in as "visitor2". The MyNewsletters portlet contains a list of newsletters created by Visitor 2, as shown in Figure 6-3.

Figure 6-3 MyNewsletters Portlet (Financial Advisor, Visitor 2)

2. Click the **Create Newsletter** link. The portlet expands so that you can create a new newsletter, as shown in Figure 6-4.

Figure 6-4 MyNewsletters—New Newsletter (Financial Advisor, Visitor 2)



3. Enter text in the Title, Summary, and Commentary fields; select the language and audience from the corresponding drop lists; and then click the **Create** button. The newsletter is added to the list, as shown in Figure 6-5.

Figure 6-5 MyNewsletters—New Newsletter Created (Financial Advisor, Visitor 2)

The new newsletter is now ready to be reviewed by the approver.

4. To return the portlet to its original size, click the **Finished** button.

ReviewNewsletters Portlet (for Approvers)

The ReviewNewsletters portlet is only available to Visitor 1. This portlet contains a list of newsletters created by the financial advisors. With this portlet, you can approve, reject, or remove newsletters. This portlet demonstrates providing customized content through SPI implementation and Content Selectors.

Java source:
`<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/src/examples/sampleportal/newsletter`

JSP source:
`<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/portlets/newsletter`

To learn more about the ReviewNewsletters portlet, complete the following steps:

1. Log in as "visitor1". The ReviewNewsletters portlet for the approver contains a list of newsletters created by the financial advisors, as shown in Figure 6-6

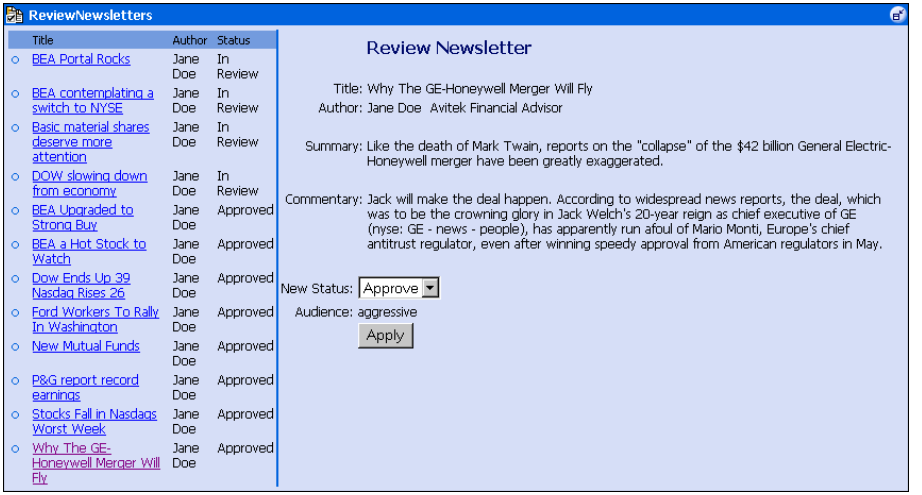
Figure 6-6 ReviewNewsletters Portlet (Approver, Visitor 1)

2. Click a newsletter link with an *In Review* status. The portlet expands so that you can read the newsletter and change its status, as shown in Figure 6-7.

Figure 6-7 ReviewNewsletters Portlet—Edit (Approver, Visitor 1)

3. Change the status of the newsletter to approved, and then click the **Apply** button. The list on the left side of the portlet updates, as shown in Figure 6-8

Figure 6-8 ReviewNewsletters Portlet—Edited (Approver, Visitor 1)



4. To return the portlet to its original size, click the **Unmaximize** button.

5. Log out as Visitor 1.

6. To see the result, log in as “visitor2” and view the MyNewsletters portlet. Figure 6-9 shows the change.

Figure 6-9 MyNewsletters—New Newsletter (Investor, Visitor 2)

7. Log out as Visitor 2.

7 Miscellaneous Portlets

This topic discusses portlets that have a variety of functionality. The following portlets are described:

- Email Portlet
- WhatsHot Portlet
- MyToDo and GroupToDo Portlets
- CustomerService Portlet

Email Portlet

The Email portlet demonstrates the use of the Java Mail API. The Email portlet displays a list of messages in an email inbox. Although you can see which messages are there, you cannot read them. This section describes how to set up the Email portlet.

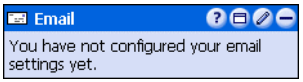
Java source:
`<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/src/examples/sampleportal/email`

JSP source:
`<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/portlets/email`

To configure the Email portlet, complete the following directions:

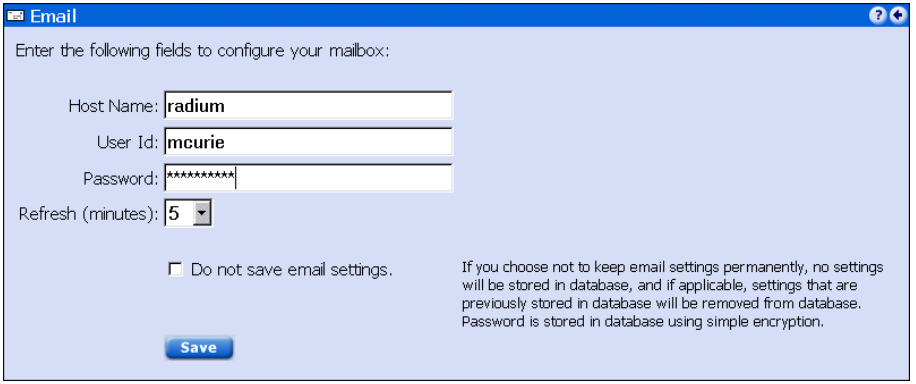
1. Log in as any visitor.
2. In the Email portlet, click the **Edit** button, as shown in Figure 7-1.

Figure 7-1 Email Portlet—Not Configured



3. In the expanded Email portlet, fill in the fields. Figure 7-2 shows an example.

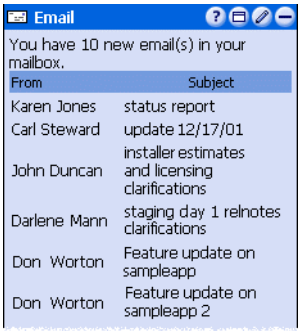
Figure 7-2 Email Portlet—Edit



4. Click the **Save** button, and then click the **Finished** button.

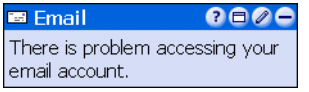
   If you have entered the correct information, you should see your new emails in the Email portlet, as shown in Figure 7-3.

Figure 7-3 Email Portlet—New Email



If the information you entered is not correct, the Email portlet indicates a problem, as shown in Figure 7-4.

Figure 7-4 Email Portlet—Improperly Configured



5. Log out of the portal.

WhatsHot Portlet

The WhatsHot portlet is an example of a simple reporting portlet. It shows the number of times a campaign ad or company profile has been clicked. This portlet pulls information from the WebLogic Portal event tracking system. Specifically, the WhatsHot portlet collects real-time information from an event and displays the information. It shows the use of an asynchronous custom event listener. The content of WhatsHot can also be displayed in an Excel spreadsheet.

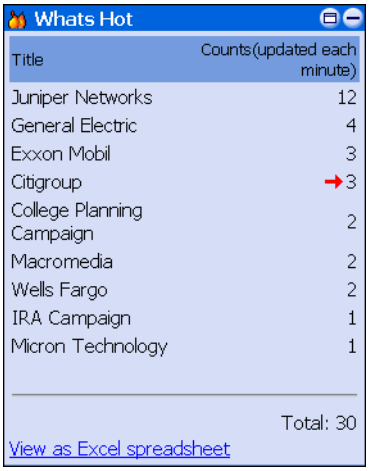
Java source:
`<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/src/examples/sampleportal/whatshot`

JSP source:
`<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/portlets/whatshot`

To learn about the WhatsHot portlet, complete the following instructions:

1. Log in as “visitor4”. The portlet appears as shown in Figure 7-5. The right column indicates the number of times that the link for each company has been clicked in the CompanyProfiles portlet.

Figure 7-5 WhatsHot—Citigroup, 3 Counts



2. Notice the number of counts for any company. For example Citigroup has a count of three, as indicated by the red arrow in Figure 7-5.

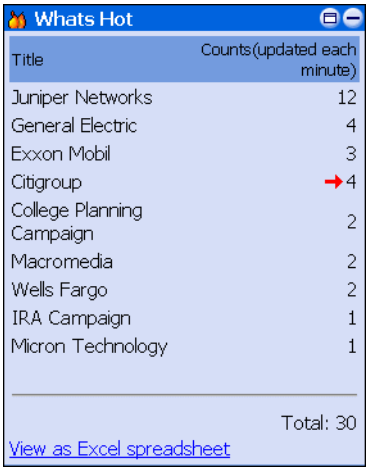
3. Go to the CompanyProfiles portlet and click any company (Figure 7-6).

Figure 7-6 CompanyProfiles Portlet

4. After the CompanyProfiles portlet expands, click the **Unmaximize** button to return the portlet to its original size.

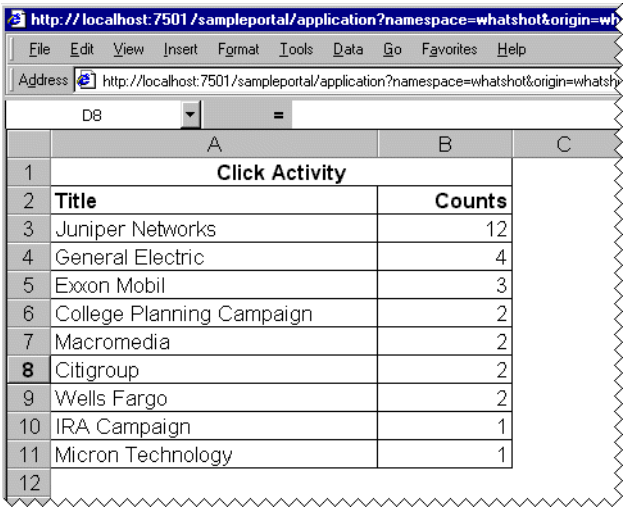
5. Now go back and look at the WhatsHot portlet. Notice that the number of counts for the company you picked increments by one. For example, Citigroup now has a count of four hits, as shown in Figure 7-7.

Figure 7-7 WhatsHot—Citigroup, 4 Counts



6. Click **View as Excel Spreadsheet**. The browser displays the spreadsheet, as shown in Figure 7-8.

Figure 7-8 WhatsHot—Excel Spreadsheet



7. To return to the portlet, click the browser **Back** button.

MyToDo and GroupToDo Portlets

The MyToDo portlet provides a list for personal activities. The GroupToDo portlet provides a list for team activities. Any changes in the GroupToDo portlet are displayed for each team member. Every member of the team can update the GroupToDo portlet. The MyToDo and GroupToDo portlets are implemented through Enterprise JavaBeans (EJB) 2.0 entity beans.

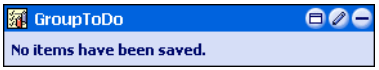
Java source:
`<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/src/examples/sampleportal/collaboration`

JSP source:
`<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/portlets/collaboration`

To learn more about these portlets, complete the following instructions:

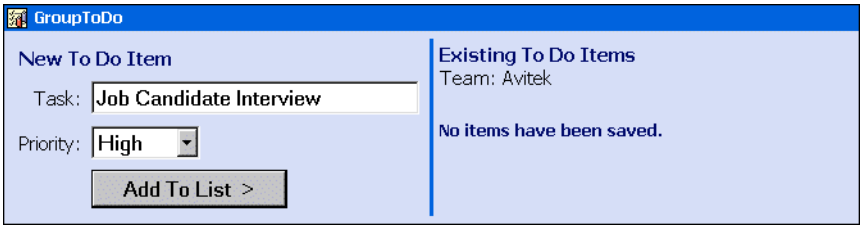
1. Log in as “visitor4”.
2. In the GroupToDo portlet, click the **Edit** button, as shown in Figure 7-9.

Figure 7-9 GroupToDo Portlet—No Items Saved



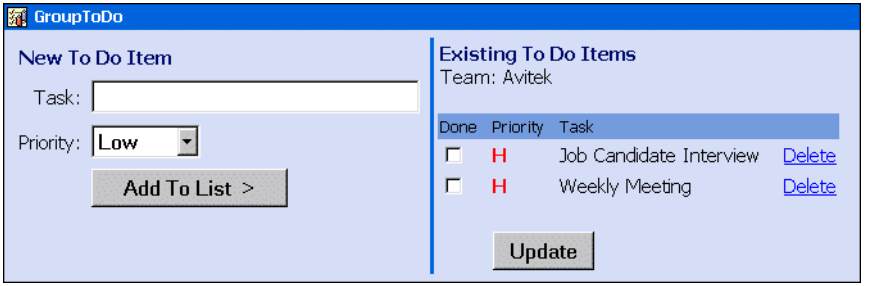
3. After the portlet expands, enter a task, set its priority, and then click the **Add to List** button, as shown in Figure 7-10

Figure 7-10 GroupToDo Portlet—New To Do Items



4. Add a second task. The portlet updates to show the changes, as shown in Figure 7-11.

Figure 7-11 GroupToDo Portlet—Item Added



5. Click the **Finished** button. The portlet now contains a To Do list, as shown in Figure 7-12.

Figure 7-12 GroupToDo Portlet—Items Added

6. Log out as Visitor 4 and log in as "visitor1". The GroupToDo portlet for Visitor 1 now shows the items entered by Visitor 4.

7. In the Visitor 1 GroupToDo portlet, click one of the check boxes, and then click the **Update** button. Figure 7-13 shows an example.

Figure 7-13 GroupToDo Portlet—Item Checked

8. Log out as Visitor 1 and log in as "visitor4". The GroupToDo portlet for Visitor 4 now shows the checked item entered by Visitor 1.

9. Log out as Visitor 4.

The MyToDo portlet operates in the same way, except other team member portlets are not updated.

CustomerService Portlet

The CustomerService portlet demonstrates EJB 2.0 implementation and integration with the J2EE Connector Architecture (JCA) sample database adaptor provided with WebLogic Server 7.0. The CustomerService portlet has two views: the Individual view, where visitors can see only their service requests and add new requests, and the Service Representative view, where all service requests from every group member are displayed.

Java source:
`<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/src/examples/sampleportal/customerservice`

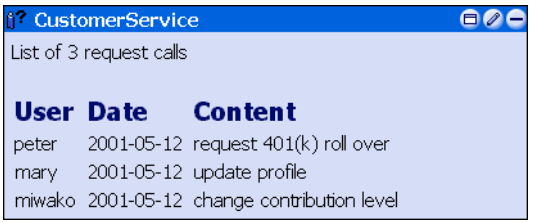
JSP source:
`<BEA_HOME>/weblogic700/samples/portal/sampleportalDomain/beaApps/sampleportal/portlets/customerservice`

To learn more about the CustomerService portlet, complete the following instructions:

1. Log in as "visitor5". The CustomerService portlet appears as shown in Figure 7-14.

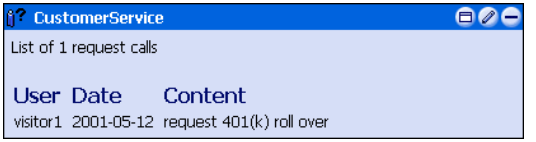
   Note: Only the CustomerService Representative (Visitor 5) can see all the requests.

Figure 7-14 CustomerService Portlet—Default (Visitor 5)



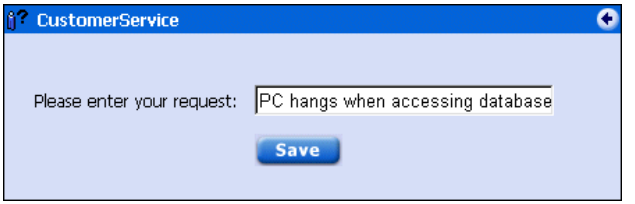
2. Log out as Visitor 5 and then log in as "visitor1". The CustomerService Portlet appears as shown in Figure 7-15.

Figure 7-15 CustomerService Portlet—Default (Visitor 1)



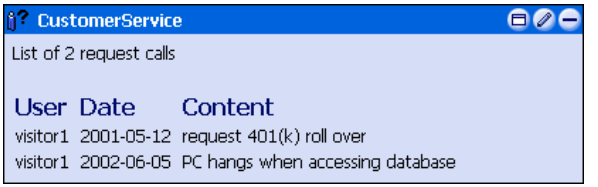
3. In the Visitor 1 CustomerService portlet, click the **Edit** button. The portlet expands as shown in Figure 7-16.

Figure 7-16 CustomerService Portlet—Enter Request (Visitor 1)



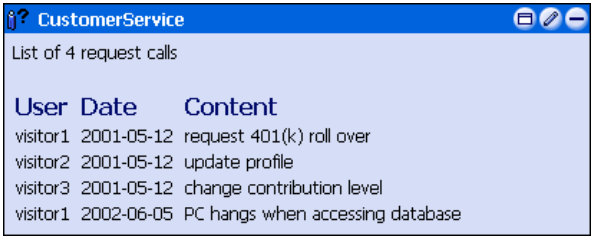
4. Enter a request, click the **Save** button, and then click the **Finished** button. The portlet now shows the service request, as shown in Figure 7-17.

Figure 7-17 CustomerService Portlet—New Request (Visitor 1)



5. Log out as Visitor 1 and then log back in as “visitor5”. The portlet shows the new service request, as shown in Figure 7-18.

Figure 7-18 CustomerService Portlet—New Request Added (Visitor 5)



6. Log out as Visitor 5.

What's Next

This concludes the Portal Example—Portlet Features and Functionality tour. To learn about portal functionality, see *Portal Example—Visitor and Administrator Features* at http://edocs.bea.com/wlp/docs70/ptour/index.htm.

To learn about WebLogic Portal administration, see the *Administration Guide* at http://edocs.bea.com/wlp/docs70/admin/index.htm.

To learn about WebLogic Portal development, see the *Development Guide* at http://edocs.bea.com/wlp/docs70/dev/index.htm.

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