BEA WebLogic Portal™

Using the Visitor Tools

Version 8.1
Document Revised: July 18, 2003

Copyright

Copyright © 2003 BEA Systems, Inc. All Rights Reserved.

Restricted Rights Legend

This software and documentation is subject to and made available only pursuant to the terms of the BEA Systems License Agreement and may be used or copied only in accordance with the terms of that agreement. It is against the law to copy the software except as specifically allowed in the agreement. This document may not, in whole or in part, be copied, photocopied, reproduced, translated, or reduced to any electronic medium or machine readable form without prior consent, in writing, from BEA Systems, Inc.

Use, duplication or disclosure by the U.S. Government is subject to restrictions set forth in the BEA Systems License Agreement and in subparagraph (c)(1) of the Commercial Computer Software-Restricted Rights Clause at FAR 52.227-19; subparagraph (c)(1)(ii) of the Rights in Technical Data and Computer Software clause at DFARS 252.227-7013, subparagraph (d) of the Commercial Computer Software--Licensing clause at NASA FAR supplement 16-52.227-86; or their equivalent.

Information in this document is subject to change without notice and does not represent a commitment on the part of BEA Systems. THE SOFTWARE AND DOCUMENTATION ARE PROVIDED “AS IS” WITHOUT WARRANTY OF ANY KIND INCLUDING WITHOUT LIMITATION, ANY WARRANTY OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. FURTHER, BEA Systems DOES NOT WARRANT, GUARANTEE, OR MAKE ANY REPRESENTATIONS REGARDING THE USE, OR THE RESULTS OF THE USE, OF THE SOFTWARE OR WRITTEN MATERIAL IN TERMS OF CORRECTNESS, ACCURACY, RELIABILITY, OR OTHERWISE.

Trademarks or Service Marks

BEA, Jolt, Tuxedo, and WebLogic are registered trademarks of BEA Systems, Inc. BEA Builder, BEA Campaign Manager for WebLogic, BEA eLink, BEA Liquid Data for WebLogic, BEA Manager, BEA WebLogic Commerce Server, BEA WebLogic Enterprise, BEA WebLogic Enterprise Platform, BEA WebLogic Express, BEA WebLogic Integration, BEA WebLogic Personalization Server, BEA WebLogic Platform, BEA WebLogic Portal, BEA WebLogic Server, BEA WebLogic Workshop and How Business Becomes E-Business are trademarks of BEA Systems, Inc.

All other trademarks are the property of their respective companies.

Contents

Using the Visitor Tools

Overview 1-1

Login to a Portal 1-2

Modify Portal Resources 1-3

- View the Contents of a Portal 1-3
- Edit the Contents of the Primary Book (Portal) 1-4
  - Change the Menu Style 1-4
  - Reorder the Book Items 1-5
  - Add Existing Book Items 1-5
  - Add a New Page 1-6
  - Add a New Book 1-7
  - Remove a Book Item 1-8
- Edit the Contents of a Page 1-8
  - Change the Page Layout 1-8
  - Move Items on a Page 1-9
  - Add New Items to a Page 1-9
  - Remove an Item From a Page 1-10
- Rename a Page 1-11
- Move a Page 1-11
- Rename a Portlet 1-12
- Move a Portlet 1-12

Change the Theme 1-13
Change the Portal Look and Feel 1-13

Adding Visitor Tools to a Custom Application

Adding Visitor Tools to a New Portal Application 2-1

CHAPTER 1

Using the Visitor Tools

Overview

Portal visitors can use browser-based tools to personalize the makeup and appearance of their portal. This guide details the portal features that are available to registered visitors.

These step-by-step instructions tell you how to:

- Login to a portal
- Modify portal resources
  - View the contents of a portal
  - Edit the contents of a portal
    - Change the menu style
    - Reorder the book items
    - Add book items
    - Remove book items
    - Add a new book
    - Add a new page
  - Edit the contents of a page
    - Change the page layout
    - Add new items to the page
    - Remove items from the page

- Rename a page
- Move a page
- Rename a portlet
- Move a portlet
- Change the theme
- Change the portal look and feel

Login to a Portal

Before you can use the WebLogic Portal Visitor Tools, you must login as a registered user to a portal desktop that was created in the WebLogic Administration Portal.

Note: This guide uses the sample portal included in WebLogic Portal 8.1 for the purpose of illustrating an example.

To login to a portal:

1. Launch your browser and enter the URL for the portal you want to customize.
2. Login into the portal. In this example, the username/password is weblogic/weblogic.

Figure 1-1 Login Screen

You are now logged into the portal and can begin customizing your view of it using the Visitor Tools.

3. To begin using the Visitor Tools, click on the Customize My Portal link in the portal.

Figure 1-2 Customize My Portal Link

Modify Portal Resources

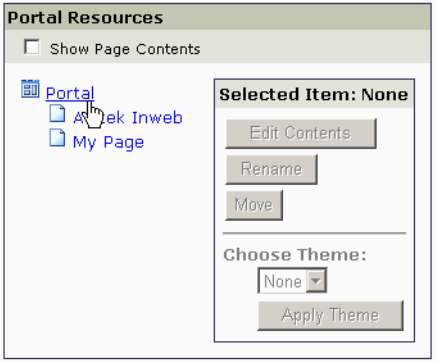
Using the Visitor Tools, you can change your view of the portal by changing items, such as the menu style or the contents of a portal book. You can also add new items, such as books and pages.

View the Contents of a Portal

To view the contents of a portal:

In the Customize your view of the Portal pane, click the box next to Show Page Contents. This expands the desktop hierarchy so you can view the major components of the portal that you can personalize.

Figure 1-3 Show Page Contents



Edit the Contents of the Primary Book (Portal)

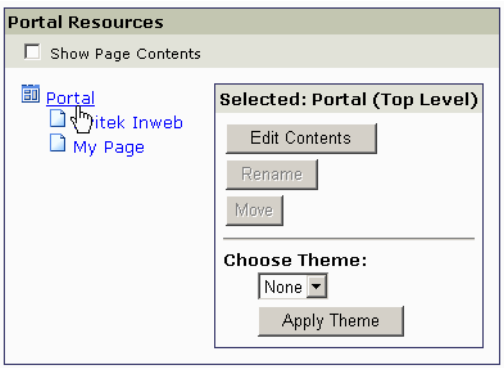
To begin customizing your view of the desktop:

1. In the hierarchy in the Portal Resource pane, click on the portal resource that you want customize.
2. When you select a book or page in the Portal Resource pane, the Edit Contents button becomes active.

Note: In the Portal Resource hierarchy, the top level is called Portal. This is not the portal itself — rather this is the desktop's primary book. When you are editing resources in this hierarchy, you are changing the contents of the resources assigned to the primary book.

3. Click Edit Contents.

Figure 1-4 Edit Contents of the Primary Book

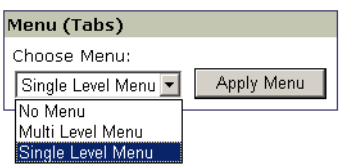


Change the Menu Style

To change the menu style:

1. In the Menu (Tabs) pane, click the drop-menu to see the available menu styles.

Figure 1-5 Choose a Menu Style



2. Click on the menu style you want to use. Click Apply Menu.

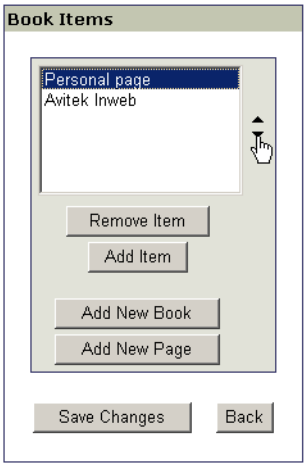
Note: To preview the new menu style, return to the portal to view your changes.

Reorder the Book Items

To reorder the items in a book:

1. In the window displaying the available book items, select the book item you want to move.
2. Click on the up or down arrows next to the window to move the item up or down.

Figure 1-6 Reorder Book Items

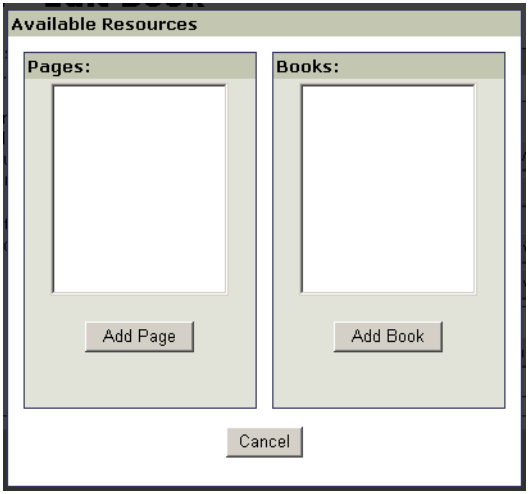


Add Existing Book Items

To add items to a book:

1. Click the Add Item button.
2. From the pop-up window, select the item you want to add. You can add existing resources to your portal by choosing items listed in the Available Resources pane. You can also add a new page or a new book.

Figure 1-7 Add Existing Items

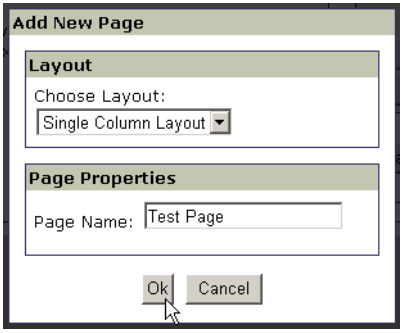


Add a New Page

To add a new page:

1. Click the Add New Page button.
2. In the Add New Page pane, select a layout from the drop-down menu.
3. In the Page Name field, enter the name for the new page.
4. Click OK. This returns you to the Book Items pane.

Figure 1-8 Add a New Page



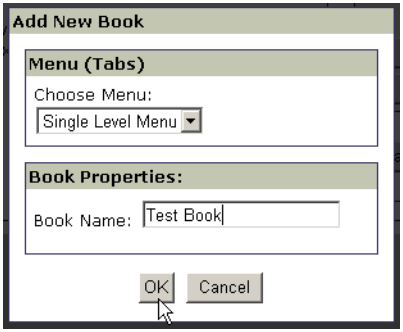
5. To edit the contents of the new page, click Save Changes in the Book Items pane. Then select the new page name from the Portal Resources pane in the Customize Your View of the Portal window.

Add a New Book

To add a new book:

1. Click the Add New Book button.
2. In the Add New Book pane, select a menu style from the drop-down menu.
3. In the Book Name field, enter the name for the new book.
4. Click OK. This returns you to the Book Items pane.

Figure 1-9 Add a New Book



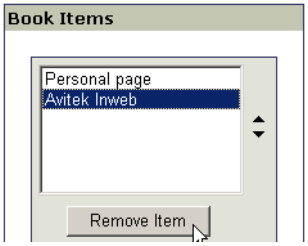
5. To edit the contents of the new book, click Save Changes in the Book Items pane. Then select the new book name from the Portal Resources pane in the Customize Your View of the Portal window.

Remove a Book Item

To remove an item from a book:

1. In the Book Items pane, select the item you want to delete.
2. Click Remove Item.

Figure 1-10Remove a Book Item



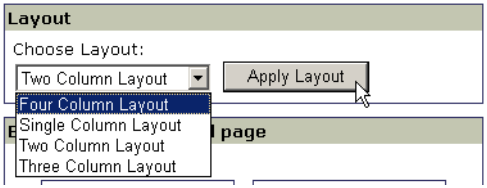
Edit the Contents of a Page

Change the Page Layout

To change the page layout:

1. In the Portal Resources pane, click the page you want to change. Click Edit Contents.
2. In the Layout pane, select the layout you want from the drop-down menu.
3. Click Apply Layout.

Figure 1-11Choose a Layout



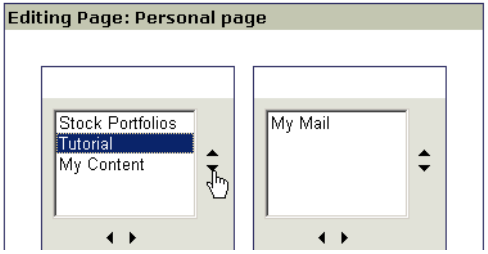
Note: If you reduce the number of columns in your layout, any portlets from the removed columns will be moved to the remaining columns in the layout.

Move Items on a Page

To move items on a page:

1. In the Portal Resources pane, click the page you want to change. Click Edit Contents.
2. In the Editing Page pane, select the page item you want to move.
3. Using the up and down arrows to the right of the window, you can move the item's position within a column in the layout.
4. Using the left and right arrows at the bottom of the window, you can move the item's position to another column in the layout.

Figure 1-12Move the Items on a Page

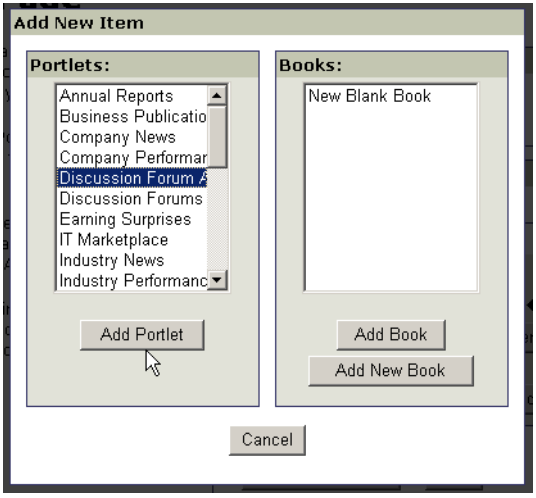


Add New Items to a Page

To add a new item to a page:

1. In the Portal Resources pane, click the page you want to change. Click Edit Contents.
2. In the Editing Page pane, click Add New Item.
3. In the pop-up window, select a new item from the list of available resources, such as portlets and books.
4. Click Add Portlet, Add Book, or Add New Book as desired.

Figure 1-13Add New Items

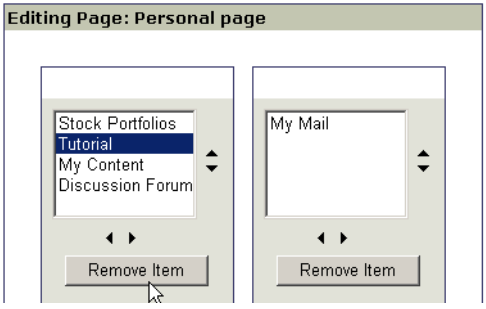


Remove an Item From a Page

To remove an item from a page:

1. In the Portal Resources pane, click the page from which you want to remove an item. Click Edit Contents.
2. In the Editing Page pane, select the item you want to remove.
3. Click Remove Item.

Figure 1-14Remove an Item From a Page

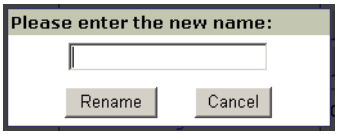


Rename a Page

To rename a page:

1. In the Portal Resources pane, click the page you want to rename. Click Rename.
2. In the pop-up window, enter the new name for the page.
3. Click Rename.

Figure 1-15Rename a Page

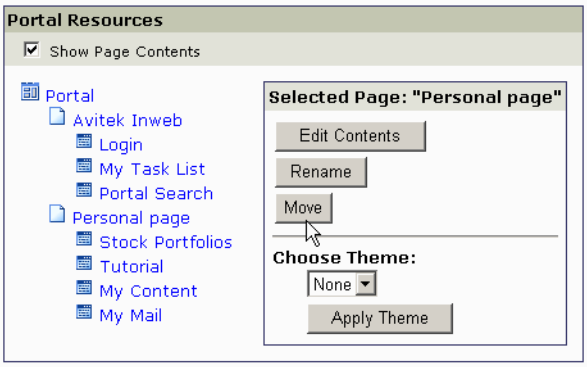


Move a Page

To move a page between books:

1. In the Portal Resources pane, click Show Page Contents in order to view embedded books.
2. Click the page you want to move. Click Move.
3. Click on the target book to which you want to move the page.
4. Click Finish Move.

Figure 1-16Move a Page



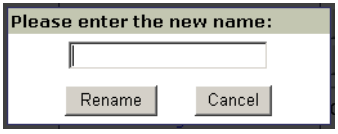
Note: To reorder the pages within a book, see “Reorder the Book Items” on page 5.

Rename a Portlet

To rename a portlet:

1. In the Portal Resources pane, click on the portlet you want to rename. Click Rename.
2. In the pop-up window, enter the new name for the portlet.
3. Click Rename.

Figure 1-17Rename a Portlet

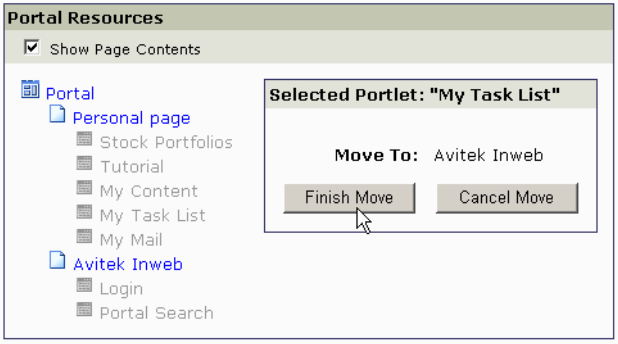


Move a Portlet

To move a portlet to a different page:

1. In the Portal Resources pane, click on the portlet that you want to move. Click Move.
2. Click on the page to which you want to move the portlet.
3. Click Finish Move.

Figure 1-18Move a Portlet



Note: To reorder portlets within a page, see “Reorder the Book Items” on page 5.

Change the Theme

To change the theme of a book, page, or portlet:

1. In the Portal Resources pane, select the book, page, or portlet for which you want to change the theme.
2. In the Choose Theme field, select an available theme from the drop-down menu.
3. Click Apply Theme.

Figure 1-19Choose a Theme

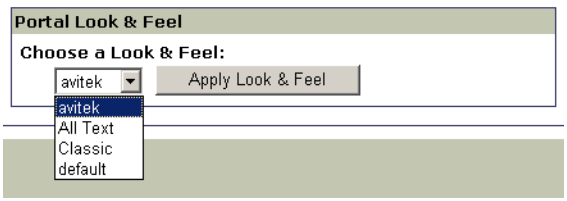
Note: Out of the box, the sample portal does not include any themes.

Change the Portal Look and Feel

To change the look and feel:

1. In the Portal Look & Feel pane, select a Look and Feel from the drop-down menu.
2. Click Apply Look & Feel.

Figure 1-20Choose a Look and Feel



CHAPTER 2

Adding Visitor Tools to a Custom Application

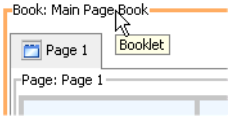
Adding Visitor Tools to a New Portal Application

WebLogic Portal Platform Edition installs with a pre-built portal application called sampleportal, which includes, a set of JavaServer Pages (JSPs) that enable visitors to set properties on personalized views of the portal.

Use the following procedure to add these visitor tools to a new portal application, which can then be customized.

1. In the native file system, copy the following directories inclusively:
   - Copy the entire com/bea/jsptools/portal directory from the WEB-INF/classes directory in sampleportal into the WEB-INF/classes directory of the new Web application.
   - Copy the entire com/bea/jsptools/portal directory from the WEB-INF/classes directory in sampleportal to the WEB-INF/classes directory of the new Web application.
   - Copy the entire visitorTools directory from the sampleportal directory in portalApp to the Portal Project directory of the new Web application.
2. In WebLogic Workshop Platform Edition, open the new Portal application.
3. In the Portal Designer, select the main book.

Figure 2-1 Select Main Book



4. In the Properties Designer, set the Editable property to Edit in Menu. The Mode Properties heading is added to the available properties.

5. Click on the Content URI and browse to the /visitorTools/visitorTools.portion file.

6. The three JSPs inside the visitorTools directory, visitorToolsMain, visitorToolsEditPage, visitorToolsEditBook, contain a reference to a javascript file called dialog.js in the sampleportal application. Edit the source for each of these files, changing the path to refer to the new location of this file.

   Change this:

   ```
   <script language="JavaScript"
   src="/sampleportal/visitorTools/dialog.js"
   type="text/javascript"></script>
   ```

   to this:

   ```
   <script language="JavaScript"
   src="/<yourNewPortalProject>/visitorTools/dialog.js"
   type="text/javascript"></script>
   ```

7. When this portal runs, (not in development mode, but in a live desktop) the edit icon will appear on the main book. Clicking this icon takes the user to the Visitor Tools.

Note: The Visitor Tools JSPs only work when the portal server is running, and must be accessed by a user logged into the desktop.