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WebLogic Platform 8.1 Online Documentation

[WebLogic Platform 8.1](#) includes: [WebLogic Server](#), [WebLogic Workshop](#), [WebLogic Portal](#), [WebLogic Integration](#), [WebLogic JRockit](#)

## Task 1: Setting Up Users and Groups

This tutorial task helps you learn how to set up portal users and groups. This task takes about 10 minutes to complete.

### Task Goals

At the end of this task you will have created users and groups that can be entitled to access various parts of a portal or can be associated with Delegated Administration functions.

### Task Overview

The WebLogic Administration Portal includes editors that let you create and manage users, groups, Visitor Entitlements, and Delegated Administration roles. In this task you will use the Users and Groups editor in the WebLogic Administration Portal to set up new groups and users that you can entitle for your portal.

### Steps in This Task

#### [Step 1: Start the WebLogic Administration Portal](#)

In this step you open the Weblogic Administration Portal.

#### [Step 2: Create Groups](#)

In this step you create two groups and one child group.

#### [Step 3: Create New Users](#)

In this step you add two new users who are placed in the new groups upon user creation.



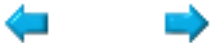
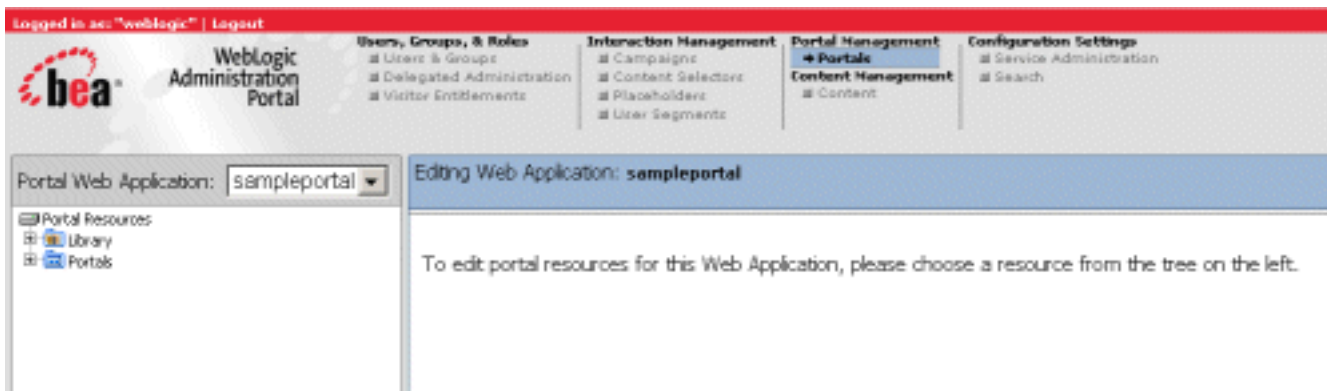


## Step 1: Start the WebLogic Administration Portal

In this step you will open the WebLogic Administration Portal.

To start the WebLogic Administration Portal:

1. Be sure your server is running. You can start the server from a start script called startWebLogic located in the <BEA\_HOME>/weblogic81/samples/domains/portal directory.
2. Choose **Start -> Programs -> BEA WebLogic Platform 8.1 -> Examples -> WebLogic Portal -> WebLogic Administration Portal**.
3. Login using **weblogic** as the username and the password. You should now see the WebLogic Administration Portal.



## Step 2: Create Groups

In this step you will create two groups and one child group.

### Create Two Groups

1. Select **Users and Groups** in the main navigation pane.



2. In the User Groups Resource tree, right-click the **everyone (All Users)** group.
3. Select **Add User-Group**. The following pop-up window appears:



4. Name the group **InternalUsers**, and click **Create**. A status message regarding the successful group creation appears at the top of the Editor pane.
5. Repeat steps 2-4 to create a second group called **ExternalUsers**.

**Note:** A group of external users might include customers, analysts, or content subscribers.

### Create One Child Group

1. In the User-Groups Resource tree, right click **InternalUsers** and select **Add User-Group**.
2. Name the child group **Employees**, and click **Create**. A message indicating the successful group creation appears at the top of the Editor pane.

You have now created a child group, Employees, that belongs to the parent group Internal Users.



## Step 3: Create New Users

In this step you will create three new users.

1. In the User-Groups Resource tree, select the **Internal Users group**.
2. Select the **Add Users** tab in the Editor pane.

Create New User

1  
Search

Search for User(s) **NOT** in this Group that you would like to **Add**.

Manual Search - Enter Login Name or Expression, then click "Search":

Quick Search - Find all Users NOT in Group whose login name starts with:

Show All Users

A	B	C	D	E	F	G	H	I	J	K	L	M
N	O	P	Q	R	S	T	U	V	W	X	Y	Z

2  
Select

Select User(s) from the Search Results.

Results per page: 10

Please search for Users in Step One.

3  
Add

Add the selected User(s).

3. Click **Create New User**. The **Add a New User** window appears.

Add a New User

Username:

Password:

Confirm Password:

(The default password is "password")

4. Name the user **MyInternalUser**, leaving the default password as is.
5. Click **Create New User**. The following two messages appear at the top of the Editor pane:

\* Successfully created User **"MyInternalUser"**. (Click the username to edit this user.)  
 \* User **"MyInternalUser"** successfully added to group **"InternalUsers"**.

The new user has been created and added to the group that was selected before the Add User operation began.

6. Repeat steps 2-5 to add user **MyExternalUser** to the group **ExternalUsers**.
7. Repeat steps 2-5 to add user **MyEmployee** to the group **Employees**.

You have successfully created users and groups. Now you are ready to create a basic portal.



## Task 2: Building A Portal

This tutorial task introduces portals and desktops, and demonstrates how to use the WebLogic Administration Portal to build them.

A portal provides a way to aggregate content and integrate applications, allowing a visitor to a Web site to access everything via a single user interface. Portals are composed of a collection of portlets, each of which typically presents an application. Portlets are arranged on pages, which in turn are part of a book. These components are on the main body of the portal, which can also include a header and footer as part of the shell. The way that the portal is displayed and how it behaves is determined by the look and feel. It is this collection of components that makes up a portal.

A desktop is a specific view of a portal, allowing for variations based on the characteristics of a visitor to a site. For example, an employee and a customer might both visit a particular portal, but each will be directed to the appropriate desktop. Each desktop can have a distinct look and feel, organization of books and pages, and set of available portlets. Further control over the available resources is accomplished with Visitor Entitlements. For more information, see [Task 3: Setting Entitlements for Portal Resources](#).

In this task you will create a basic portal and two desktops, which will be used in the later tasks. This task takes about 20 minutes to complete.

### Task Goals

The goal of this task is to learn how to create a basic portal, two desktops, and add a number of portal resources. These desktops will be used in later tasks for setting entitlements and delivering personalized content.

### Task Overview

In this task, you will create a portal, two desktops, add portal resources to one of the desktops, and view it.

### Steps in This Task

#### [Step 1: Start the WebLogic Administration Portal](#)

In this step you open the WebLogic Administration Portal, if it is not already open.

#### [Step 2: Create a Basic Portal](#)

In this step you create a new portal called MyPortal.

### [Step 3: Create Two Desktops for MyPortal](#)

In this step you create two desktops for MyPortal -- Desktop1 using a template and Desktop2 using existing portal resources.

### [Step 4: Add Portal Resources to a Desktop](#)

In this step you add a new page to Desktop2, then add two portlets to the new page.



## Task 3: Setting Entitlements for Portal Resources

Visitor Entitlements, also called entitlements, control access to portal application resources such as portlets, pages, and desktops. Entitlements can be set in the library or in portal applications. Entitlements use Visitor Entitlement roles and security policies to control access to resources.

Visitor Entitlement roles dynamically group users based on username, group membership, profile, session and request attributes, and an assortment of date and time functions. Security policies determine what capabilities for a given resource are available to a given role. Entitlement capabilities differ by resource and include view, minimize, maximize, and edit.

This task take 20 minutes to complete.

### Task Goals

At the end of this task you will have created entitlement roles and applied them to desktops, pages, and portlets.

### Task Overview

In this task you will set entitlements on the following portal resources:

- A desktop
- A page
- A portlet

### Steps in This Task

#### [Step 1: Start the WebLogic Administration Portal](#)

In this step you open the WebLogic Administration Portal.

#### [Step 2: Create Visitor Entitlement Roles](#)

In this step you create three entitlement roles and assign groups to them.

#### [Step 3: Entitle a Desktop](#)

In this step you entitle a desktop with your new entitlement roles.

#### [Step 4: Entitle a Page in the Portal Library](#)



**In this step you entitle a page in the Portal Library with your new entitlement roles.**

### **[Step 5: Entitle a Portlet](#)**

**In this step you entitle a portlet in the Portal Library with your new entitlement roles.**

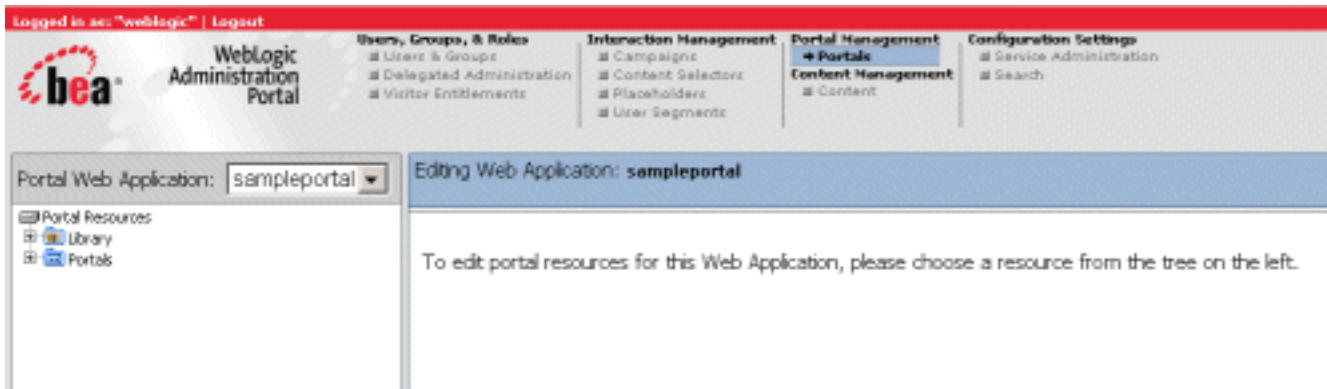


## Step 1: Start the WebLogic Administration Portal

In this step you will open the WebLogic Administration Portal to access the administration tools. If you completed any of the other tasks in the [WebLogic Administration Portal Tutorial](#), the WebLogic Administration Portal is already open, and you can move on to [Step 2](#) of this task.

To start the WebLogic Administration Portal:

1. Be sure your server is running. You can start the server from a start script called startWebLogic located in the <BEA\_HOME>/weblogic81/samples/domains/portal directory.
2. Choose **Start -> Programs -> BEA WebLogic Platform 8.1 -> Examples -> WebLogic Portal -> WebLogic Administration Portal**.
3. Login using **weblogic** as the username and the password. You should now see the WebLogic Administration Portal.



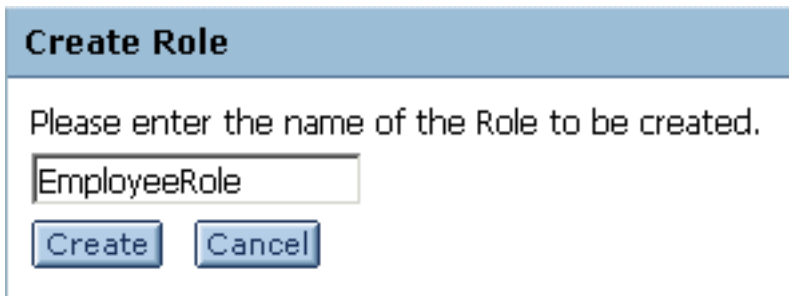
## Step 2: Create Visitor Entitlement Roles

In this step you will create Visitor Entitlement Roles based on the users and groups developed in [Task 1: Setting Up Users and Groups](#).

1. Select **Visitor Entitlements** in the main navigation pane.

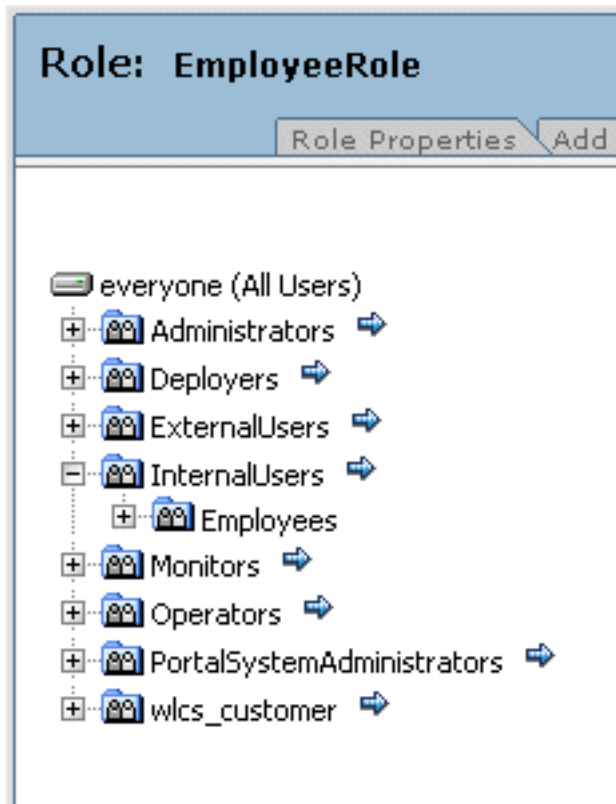


2. In the Visitor Entitlements Resource tree, right click **Visitor Roles**, and select **Create Role**.
3. Name the role **EmployeeRole**, and click **Create**.

A screenshot of a 'Create Role' dialog box. The title bar says 'Create Role'. The main text says 'Please enter the name of the Role to be created.' Below this is a text input field containing the text 'EmployeeRole'. At the bottom of the dialog are two buttons: 'Create' and 'Cancel'.

**Note:** The new role appears in italics until added to at least one group.

4. From the Visitor Entitlements Resource tree, click on the new **EmployeeRole** and select **Add Groups to Role** tab in the Editor pane.



5. Expand the **InternalUsers** group, and click the blue arrow next to the group called **Employees**.
6. Click the checkbox next to **Employees**, and select **Add Group(s) to Role**:



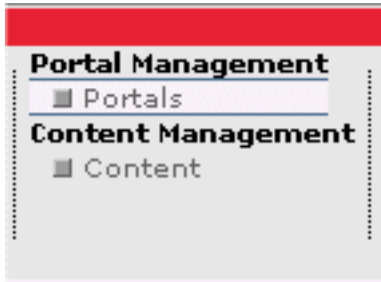
7. Select the **Role Properties** tab, and notice that Employees are now shown as a group within the role.
8. Repeat steps 2 and 3 to create two new roles: **InternalRole** and **ExternalRole**.
9. Repeat steps 4 and 5 to add the **InternalUsers** group to **InternalRole**.
10. Repeat steps 4 and 5 to add the **ExternalUsers** group to the **ExternalRole**.

You have created three roles predicated on group membership. The child groups are considered to fulfill the group membership of their parents. While MyEmployee is only a member of Employees, it is also a member of the group InternalUsers because the Employees group is a child of InternalUsers.

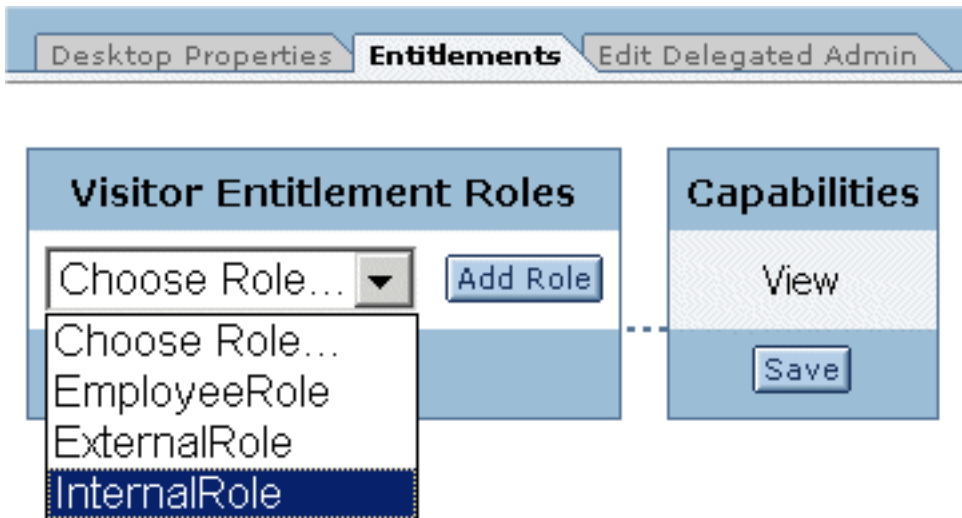


### Step 3: Entitle a Desktop

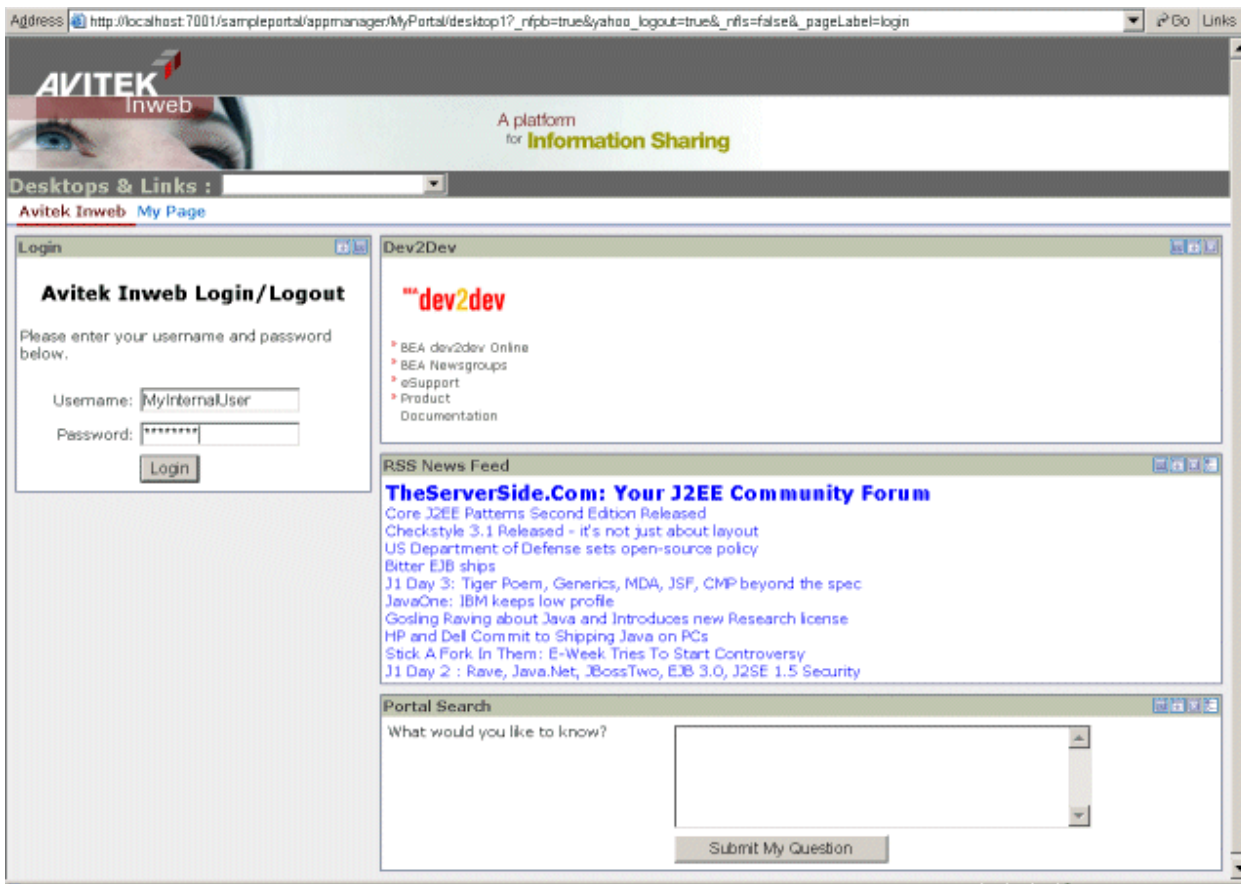
1. Select **Portals** in the main navigation pane.



2. In the Portal Resource tree, navigate to **Portals** -> **MyPortal** -> **Desktop2**.
3. Select the **Entitlements** tab in the Editor pane.



4. Select **InternalRole**, and click **Add Role**.
5. Check the **View** capability and click **Save**.
6. Start a separate browser session and go to the URL:  
<http://localhost:7001/sampleportal/appmanager/MyPortal/desktop1>. Login as **MyInternalUser**, using the default password of **password**.



7. Select the Desktop and Links drop-down menu, and select **Desktop2**.



8. Now return to Desktop1 by selecting **Desktop1** in the Desktop and Links drop-down menu.
9. Log out and log back in as **MyExternalUser**, using the default password of **password**.
10. Select the Desktop and Links drop-down menu.

**Note:** Notice that Desktop2 does not appear as a choice for the external user. Now the default view is Desktop1 and there is no option to change desktops.

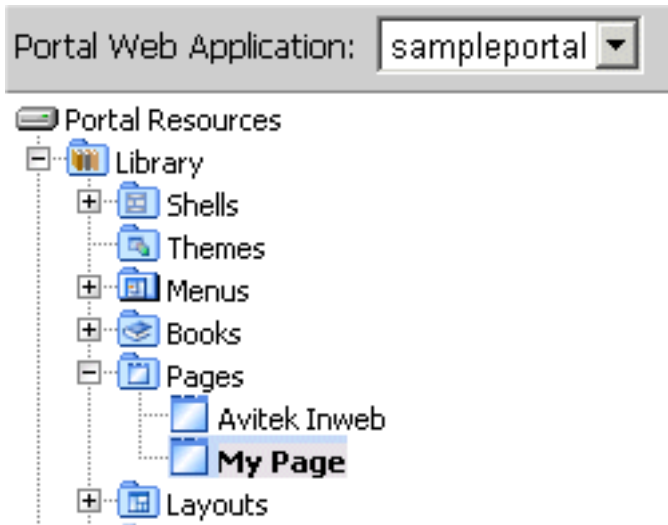
You have entitled one of two desktops in MyPortal. Desktop1 is not entitled and is available to all users. By design, resources with no entitlements placed on them are available to everyone. Only InternalRole has been granted the right to view Desktop2. Accordingly MyExternalUser does not have access.



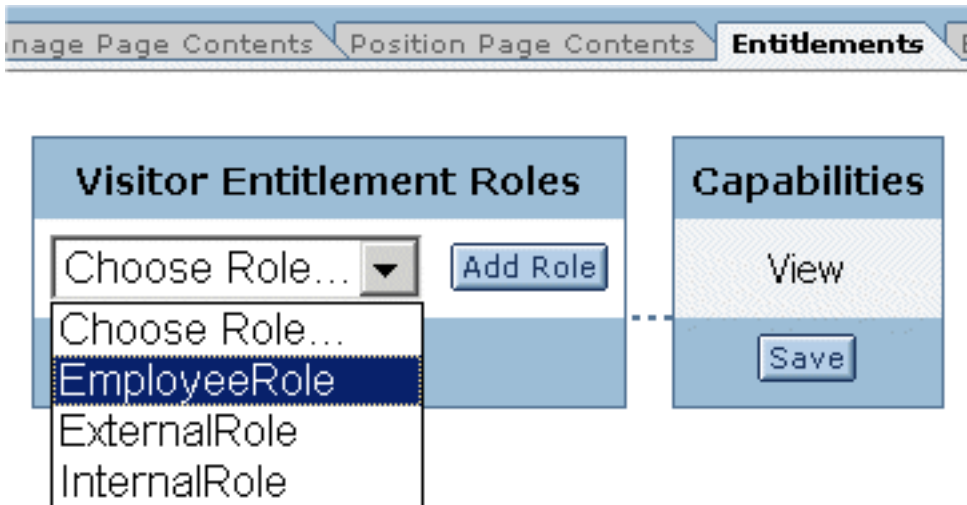


## Step 4: Entitle a Page in the Portal Library

1. In the Portal Resource tree, navigate to **Library -> Pages -> My Page**.



2. Select the **Entitlements** tab in the Editor pane.
3. Select the **EmployeeRole**, and click **Add Role**.



4. Check the **View** capability and click **Save**.
5. Open a browser and go to the URL:  
<http://localhost:7001/sampleportal/appmanager/MyPortal/desktop1>. Login as **MyInternalUser**, using the default password of **password**.
6. Select the Desktop and Links drop-down menu, and select **Desktop2**. In both desktops **My Page** is no longer available.

**Note:** If you see My Page, refresh your browser to see the current view.

7. Switch back to **Desktop1** and log out.
8. Log back in as **MyEmployee**. **My Page** is now visible.

**Note:** If you do not see My Page, refresh your browser to see the current view.

9. Switch to **Desktop2**. Again, **My Page** is now visible.

**Note:** If you do not see My Page, refresh your browser to see the current view.

In step 4 you have entitled a resource in the Portal Library. Entitlements in the library apply to all instances of the resource in portal applications. However, they do not bar you from setting more local policies in the portal application. For a given user, WebLogic Administration Portal first checks at the instance level. If it does not find a grant for a given capability, it then looks to the resource in the library.



## Step 5: Entitle a Portlet

1. In the Portal Resource tree, navigate to **Library -> All Portlets -> RSS News Feed**.
2. Select the **Entitlements** tab.

3. Select the **InternalRole**, and click **Add Role**.
4. Select the **ExternalRole**, and click **Add Role**.
5. For **InternalRole**, in the Capabilities area check the **View**, **Edit**, **Remove**, **Minimize**, and **Maximize**, and click **Save**.
6. For **ExternalRole**, in the Capabilities area check the **View** capability for both roles, and click **Save**.

Role	View	Edit	Remove	Minimize	Maximize
ExternalRole	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
InternalRole	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

7. In the Portal Resource tree, and navigate to **Library -> All Portlets -> Dev2Dev**.
8. Select the **ExternalRole**, and click **Add Role**.
9. Check the **View** capability, and click **Save**.
10. Open a browser and go to the URL:  
<http://localhost:7001/sampleportal/appmanager/MyPortal/desktop1>, and login as **MyExternalUser**.

The Avitek Inweb Page will be visible and contains four portlets – Login, RSS, Dev2Dev, and Portal Search.



**Note:** Edit, minimize, maximize, and delete capabilities are not available.

11. Log out of the portal. Login as **MyInternalUser**. As opposed to MyExternalUser, you should now not see the Dev2Dev portlet and you should see the capabilities circled in red below for the RSS portlet.



## Step 4: Add Portal Resources to a Desktop

The desktops that you have just created contain a number of portlets and have a specific look and feel. In this step you will further customize the second desktop to distinguish it from the first desktop. You will add a third page to the desktop, add portlets to it, and change the look and feel of the desktop. This type of customization is a common activity when creating portal applications that are targeted at specific types of users. In a later task you will entitle these resources so that only specific users can access them.

The tasks in this step are:

- [Add a page](#)
- [Add portlets](#)
- [Change the Look and Feel](#)

### Add a Page

A page provides a way to organize portlets into groups based on related content, similar tasks, or simply user preference. Examples include an HR page that contains company-specific portlets, a finance page that includes banking and portfolio portlets, and a personal page that includes frequently accessed portlets. In this step you will add a new page to the desktop and select the type of layout to use.

1. In the Portal Resource tree, select **MyPortal** -> **Desktop2**-> **Main Page Book**.
2. Select the **Manage Book Contents** tab:

Editing Book: **Main Page Book**

Book Properties
Manage Book Contents
Entitlements
Edit Delegated Admin

### Order Elements in this Book

Name:	Label:	Order within this Book:
Avitek Inweb	page1_2	0 <a href="#">Move Down</a>
My Page	page_2	1 <a href="#">Move Up</a>

#### Available Pages:

Avitek Inweb
Add to Book

My Page
Add to Book

Create New Page

#### Pages in Book:

Avitek Inweb
Remove from Book

My Page
Remove from Book

#### Available Books:

Main Page Book
Add to Book

Create New Book

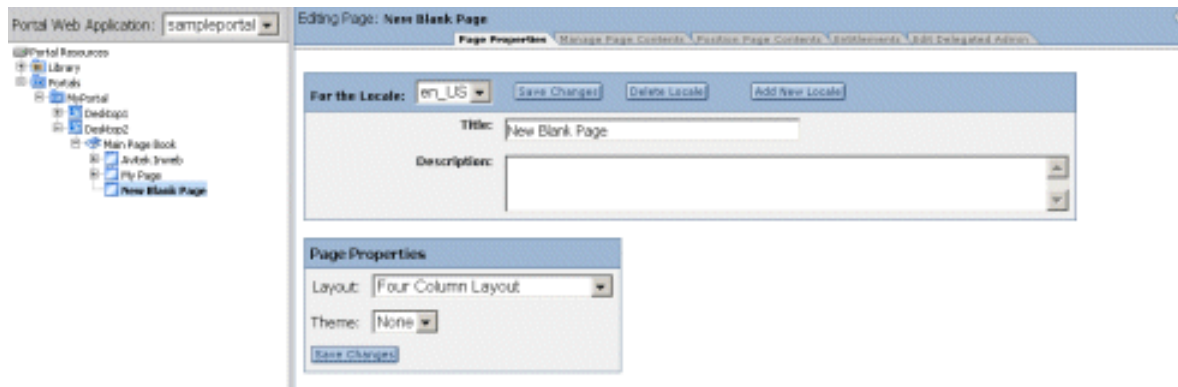
#### Books in Book:

No Books in Book...

- Click **Create New Page** in the Editor pane in the **Available Pages** section. This new page will be added to the Pages in Book section, and will also appear in the hierarchical view.
- In the Order Elements in Book section, change the order of the pages using the **Move Down** and **Move Up** buttons to match the following:

Order Elements in this Book		
Name:	Label:	Order within this Book:
Avitek Inweb	page1_2	1 <a href="#">Move Down</a>
My Page	page_2	3 <a href="#">Move Up</a> <a href="#">Move Down</a>
New Blank Page	2003	22 <a href="#">Move Up</a>

- Click on the **New Blank Page** link in the **Pages in Book** section to edit the book.



6. Select the **Page Properties** tab, and enter the following information in the **For the Locale** section:

For This Field:	Enter This Information:
Locale	en_US
Title	Tutorial Page
Description	My tutorial page

7. Click **Save Changes** in this section.

8. Enter the following information in the **Page Properties** section:

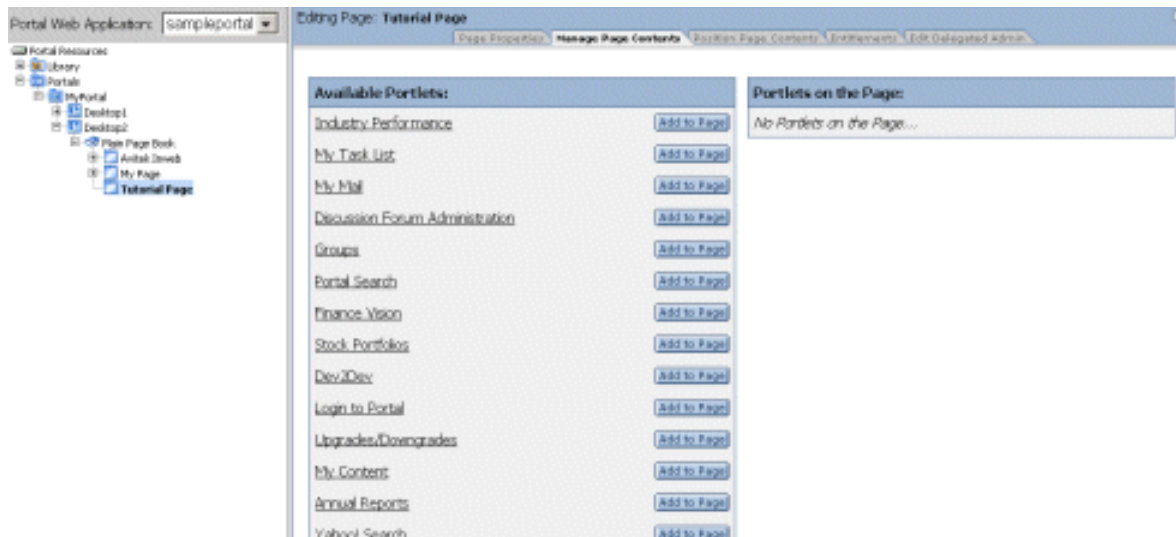
For This Field:	Enter This Information:
Layout	Three Column Layout
Theme	none

9. Click **Save Changes** in this section.

You have now added a new blank page to Desktop2, for a total of three pages – Avitek, My Page, and Tutorial Page. In the next section you will add portlets to Tutorial Page.

## Add Portlets

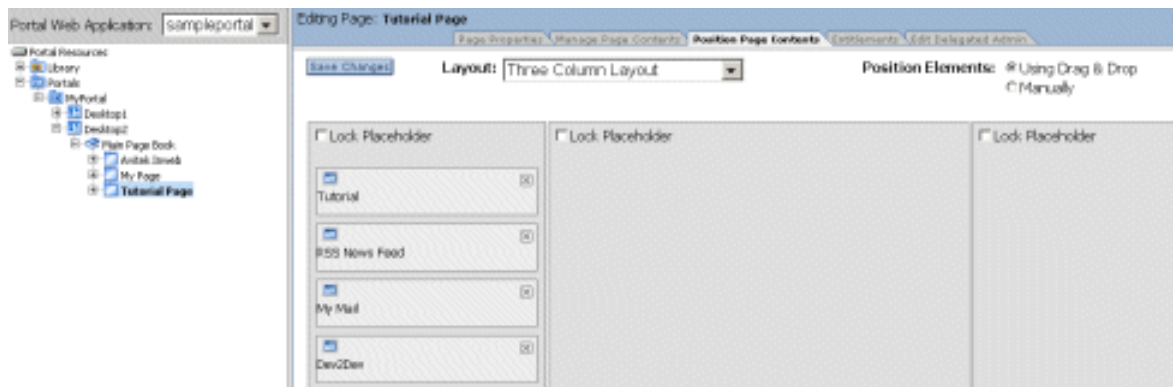
1. In the Portal Resource tree, select **Desktop2 -> Main Page Book -> Tutorial Page**.
2. Select the **Manage Page Contents** tab in the Editor pane to show that there are currently no portlets on the page:



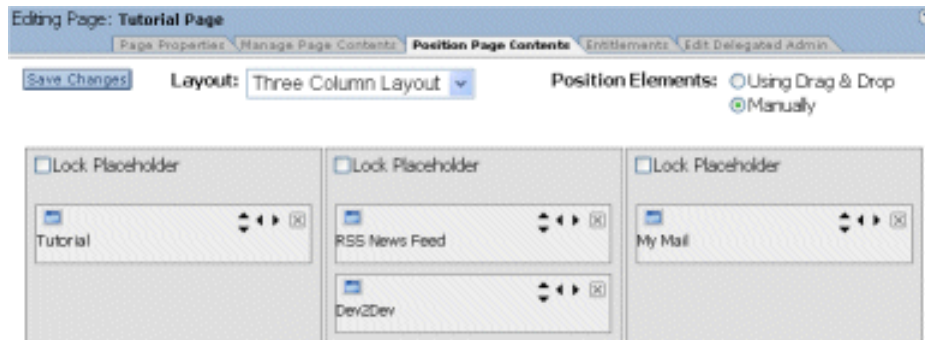
3. To add a portlet to the page, click **Add to Page** next to the desired portlet in the **Available Portlets** section. Add the following portlets to the page

- Dev2Dev
- My Mail
- RSS News Feed
- Tutorial

4. Select the **Position Page Contents** tab to change the position of these portlets on the page.



5. Using the drag-and-drop method, move the portlet positions to match the following.



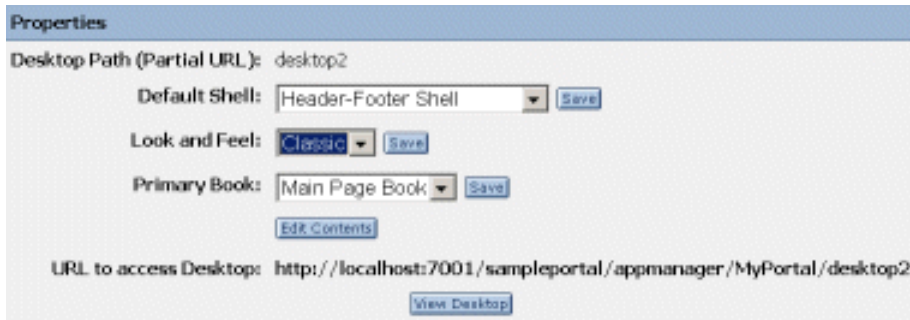
6. Click **Save Changes** to save the position of the portlets.



7. Right click **Desktop2** in the Portal Resource tree, and select **Fully Expand Node**.
8. To preview the new desktop in a browser, right click **Desktop2** and click **View Desktop**.

## Change the Look and Feel

1. In the Portal Resource tree, select **MyPortal** -> **Desktop2**, and select the **Desktop Properties** tab.
2. In the Properties section, select the **Classic** look and feel from the **Look and Feel** drop-down list, and click **Save**.



The screenshot shows the 'Properties' dialog box for a desktop. It has a title bar 'Properties'. Inside, the 'Desktop Path (Partial URL):' is set to 'desktop2'. Below this, there are three rows of settings, each with a dropdown menu and a 'Save' button: 'Default Shell:' is set to 'Header-Footer Shell', 'Look and Feel:' is set to 'Classic', and 'Primary Book:' is set to 'Main Page Book'. Below these is an 'Edit Contents' button. At the bottom, the 'URL to access Desktop:' is displayed as 'http://localhost:7001/sampleportal/appmanager/MyPortal/desktop2', with a 'View Desktop' button next to it.

3. Click **View Desktop** in the Properties section to view Desktop2 in a browser.

You have now successfully added and configured a page, added and configured multiple portlets on the page, and changed the look and feel of the desktop.

In the following tasks you will set entitlements for this desktop to control what is accessible, you will use personalization to determine what content is displayed, and you will control which administrators are allowed to modify the desktop.

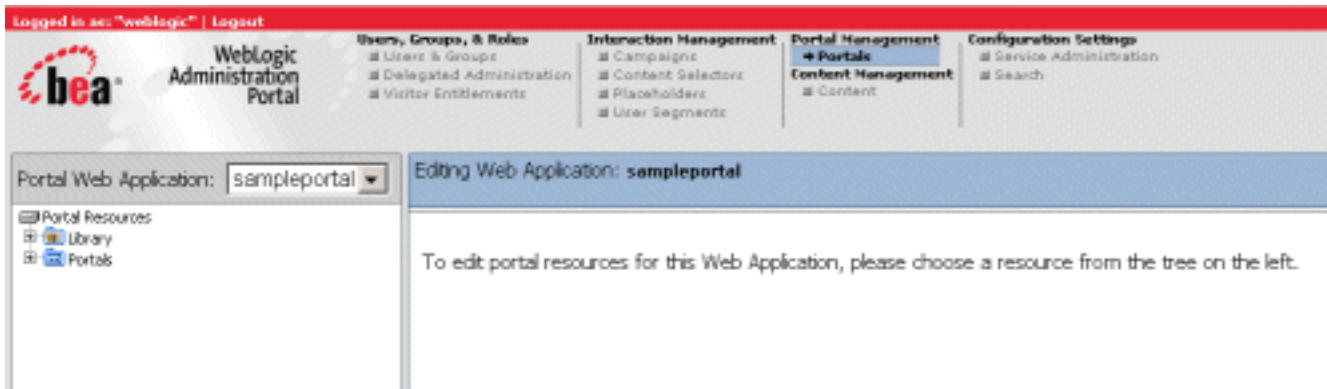


## Step 1: Start the WebLogic Administration Portal

In this step you will open the WebLogic Administration Portal to access the administration tools. If you completed any of the other tasks in the [WebLogic Administration Portal Tutorial](#), the WebLogic Administration Portal is already open, and you can move on to [Step 2](#) of this task.

To start the WebLogic Administration Portal:

1. Be sure your server is running. You can start the server from a start script called startWebLogic located in the <BEA\_HOME>/weblogic81/samples/domains/portal directory.
2. Choose **Start -> Programs -> BEA WebLogic Platform 8.1 -> Examples -> WebLogic Portal -> WebLogic Administration Portal**.
3. Login using **weblogic** as the username and the password. You should now see the WebLogic Administration Portal.



## WebLogic Administration Portal Tutorial

This tutorial highlights many of the primary tasks for portal administration using the WebLogic Administration Portal tools. This tutorial has six tasks that guide you through incrementally creating, modifying, and using portal resources to build a portal. If you prefer a PDF version of this tutorial, you can download it at <http://e-docs.bea.com/wlp/docs81/>.

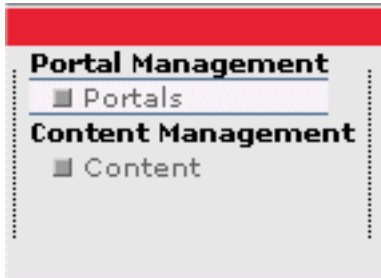
- [Task 1: Setting Up Users and Groups](#)
- [Task 2: Building a Portal](#)
- [Task 3: Setting Entitlements for Portal Resources](#)
- [Task 4: Setting Up and Managing Content](#)
- [Task 5: Setting Up Personalization](#)
- [Task 6: Setting Up Delegated Administration Roles](#)

## Step 2: Create a Basic Portal

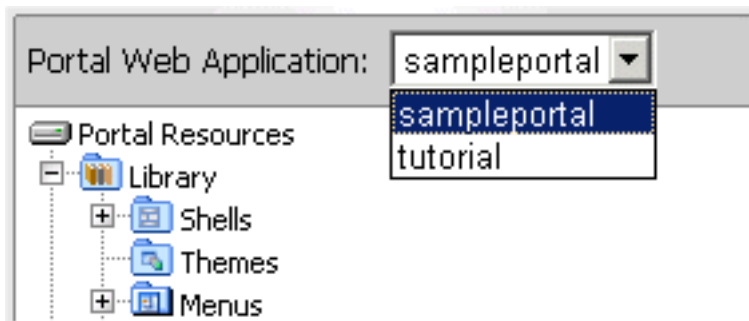
When you create a portal, you make a set of resources available to the users of a site.

To create a basic portal:

1. Select **Portals** in the main navigation pane.



2. From the Portal Web Application drop-down menu, select **sampleportal**.



3. From the Portal Resource tree, select **Portals**. The Portal Resource Editor pane appears to the right.
4. Click **Create New Portal**. The **New Portal Properties** pane appears.
5. Enter the following properties for the new portal:

For This Field:	Enter This Information:
Enter a Name for this Portal	MyPortal
Enter a Description for this Portal	This is my tutorial portal
Enter a partial URL for this Portal	MyPortal
Enter an (optional) Portal URI	desktops.jsp

6. Click **Save**. The new portal appears in the list of **Available Portals** in the Editor pane.



### Step 3: Create Two Desktops for MyPortal

You can now add desktops to your portal to provide views for specific users. The desktops are related to each other because they are part of the same portal, but they can be distinct in terms of their look and feel and the portal resources available to the users. Desktops provide an easy way for administrators to target specific users based on users' identity, group membership, or profile.

In this step, you will create two desktops, Desktop1 and Desktop2, in MyPortal, which you created in the previous step. These desktops will be used in later tasks for setting entitlements that allow them to be used by specific users or groups.

The tasks in this step are:

- [Create and preview the first desktop from a template](#)
- [Create and preview the second desktop using existing portal resources](#)

#### Create and Preview the First Desktop from a Template

In this task you will create a new desktop from a template. The template provides a way to create new desktops that are pre-configured with the portal resources that are ready for use. These templates are useful as the starting point for portal applications, allowing you to develop new desktops based on an existing template.

1. In the Portal Resource tree, expand the Portals tree, and select **MyPortal**.
2. At the bottom of the Editor pane, click **Create New Desktop**.

**New Desktop Properties**

Title:

Description:

Partial URL:

 (see online help)

URL to access Desktop:

http://localhost:7001/sampleportal/appmanager/MyPortal/

Create New Desktop Using:

☒ Portal Template File

☐ Existing Portal Resources in Library

Choose a Template:

New Blank Desktop

Create New Desktop

Cancel

3. Fill in the fields of the New Desktop Properties form with the following information:

For This Field:	Enter This Information:
Title	Desktop1
Description	My first desktop
Enter a partial URL for this Desktop	desktop1
Create New Desktop Using (radio button)	Portal Template File
Choose a Template (drop-down menu)	sampleportal/sample.portal

6. Click **Create New Desktop**. If you have used this template before, you might see the following dialog:

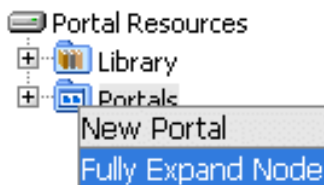
**WARNING: Portal Template Contains Duplicate Resources**

There are Portal resources in the selected Portal Template that conflict with resources already in the Library. The resources share the same identifier (i.e. "Definition Label") which must be unique. What would you like to do?

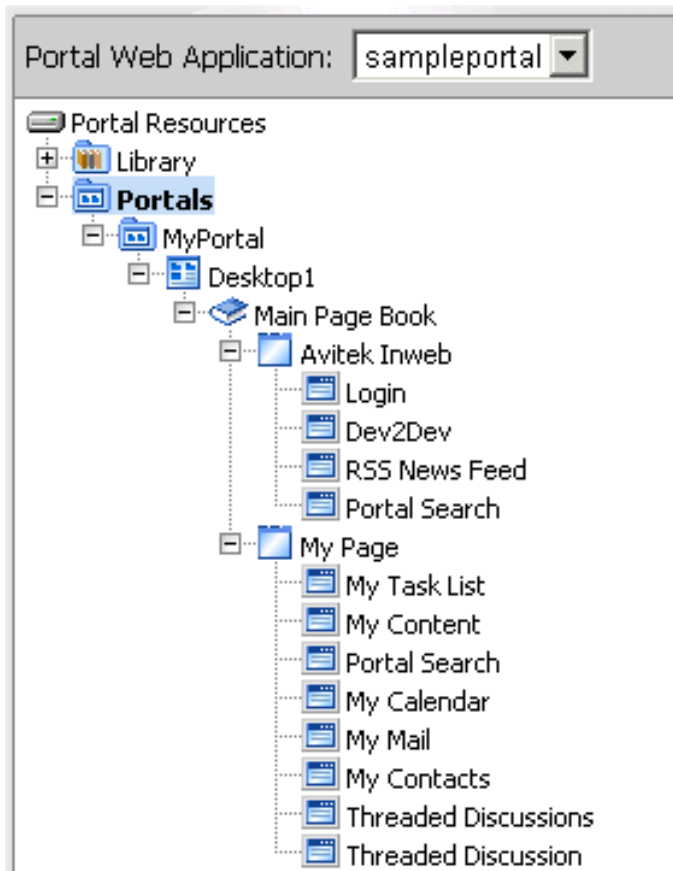
- ☒ Keep Portal Resources already in the Library
- ☐ Replace conflicting Portal Resources with Template version

OK Cancel

7. Select **Keep Portal Resources already in the Library** and click **OK**.
8. Right click **Portals** in the Portal Resource tree, and select **Fully Expand Node**.



All the resources belonging to the new desktop appear in the Resource tree.



9. To preview the new desktop in a browser, right click **Desktop1**, and click **View Desktop**.

**Note:** Depending on the speed of your system, it might take a few minutes for the preview to appear.

### Create and Preview the Second Desktop Using Existing Portal Resources

In this task you will create a second desktop using existing portal resources that are available from the library. These resources include the portlets, books, pages, look and feels, and shells that make up a desktop. This is different from using a template in that the resulting desktop can be composed of a unique set of resources. In this tutorial you will select the same resources used by the template, so the resulting desktop is identical.

1. In the Portal Resource tree, select **My Portal**.
2. Select the **Portal Properties** tab in the Editor Pane.
3. Click **Create New Desktop**.



**New Desktop Properties**

**Title:**

**Description:**

**Partial URL:**  (see online help)

**URL to access Desktop:** **http://localhost:7001/sampleportal/appmanager/MyPortal/**

**Create New Desktop Using:** ☐ Portal Template File  
☒ Existing Portal Resources in Library

---

**Default Shell:** Header-Footer Shell

**Look and Feel:** avitek

**Primary Book:** Main Page Book

4. Fill in the fields of the New Desktop Properties form with the following information: (Be sure to select Existing Portal Resources in Library when creating the new desktop.)

For This Field:	Enter This Information:
Title	Desktop2
Description	My second desktop
Enter a partial URL for this Desktop	desktop2
Create New Desktop Using (radio button)	Existing Portal Resources in Library
Default Shell	Header-Footer Visitor Shell
Look and Feel	avitek
Primary Book	Main Page Book

5. Click **Create New Desktop**.
6. Right click **Desktop2** in the Portal Resource tree, and select **Fully Expand Node**. All the resources belonging to the second desktop appear in the Resource tree.
7. To preview the second desktop in a browser, right click **Desktop2**, and click **View Desktop**.

**You have now successfully created two desktops in MyPortal, both of which will be identical. Although each was created in a different way, they both use the same portal resources. In the following step you will add portal resources to the second desktop, making it distinctly different from the first.**



## Task 4: Setting Up and Managing Content

WebLogic Administration Portal content management enables you to integrate, manage, and personalize content in a portal environment. Task 4 focuses on managing content within a single instance of the native content repository. The personalized delivery of content will be covered in [Task 5: Setting Up Personalization](#).

Content is a key component of any portal. Content can be defined as unstructured or semi-structured data. A common example is an image file and associated metadata; for example, date created, date modified, author, and subject. In WebLogic Administration Portal, a content type defines the shape of a content item. A content type can be any combination of binary, integer, calendar, string, Boolean, and properties. Interaction Management personalizes the delivery of content based upon these non-binary properties.

Content can be organized into a content hierarchy. The top-level node is defined as the Virtual Content Repository. Under the Virtual Content Repository, you can plug in multiple, heterogeneous content repositories. This task is based on a single instance of the native BEA repository. Repositories can contain multiple hierarchy and content nodes. Hierarchy nodes function primarily as organizational units while content nodes function primarily as content items.

The task takes about 10 minutes to complete.

### Task Goals

At the end of this task you will have the knowledge necessary to create and manage content in the BEA repository.

### Task Overview

In this task you will start the Content Management tools, create new hierarchy and content nodes, and edit content hierarchy and content properties.

### Steps in This Task

#### [Step 1: Start the WebLogic Administration Portal](#)

In this step you will open the WebLogic Administration Portal.

#### [Step 2: Add Hierarchy Nodes \(2a: BulkLoader or 2b: WebLogic Administration Portal\)](#)

In this step you will create a content hierarchy and populate it with content nodes.

### Step 3: Edit Content Hierarchy and Content Properties

In this step you will reorganize your content hierarchy and edit content properties.



## Task 5: Setting Up Personalization

Personalization provides a way to deliver content to Web site visitors based upon various criteria. This includes information about the user (user profile), the users current session, the request made by the user, and other data. A personalized site provides the visitor with a better experience because the content displayed can be targeted to their interests.

One way to deliver personalized content is via a Placeholder, which is comprised of a JSP tag and a definition. The JSP tag is used by a developer on a portlet JSP, and it refers to the Placeholder definition which contains the rules that determine which content to display. In this tutorial task, you will be changing the definition of the placeholder and viewing the results in the portlet.

To tailor the content delivered in the Placeholder for specific users, a User Segment can be created and used in personalization definitions. User Segments provide dynamic classification of users based on various criteria.

For applications where more than one content item is to be displayed, or where non-image data is to be displayed, Content Selectors are provided. These are similar to Placeholders in that they have a definition managed by the administrators. But Content Selectors differ from Placeholders in the way that a developer uses them. The tradeoff is that Placeholders are easier to use, while Content Selectors provide greater flexibility.

This task provides you with instructions for personalizing delivery of the content you created in Tasks 1-4 of this tutorial. If you have not completed these tasks, please do so before starting Task 5.

This task take about 20 minutes to complete.

### Task Goals

In this task, you will learn:

- How to add a personalized portlet to your portal
- How to create users with specific characteristics to use for personalization
- How to modify the definitions used for personalization

### Task Overview

In this task you will add a personalized portlet to a desktop and see how it behaves when different users view the site. You will then modify the definitions that are used to control the personalization and see how these changes affect the appearance of the site for different users.

## Steps in This Task

### [Step 1: Start the WebLogic Administration Portal](#)

In this step you open the WebLogic Administration Portal.

### [Step 2: Edit a User Profile](#)

In this step you edit a user profile so you can see your personalized portlet in the portal.

### [Step 3: Add a Personalized Portlet to a Desktop](#)

In this step you add a personalized portlet to a desktop and view it in a portal.

### [Step 4: Modify the Placeholder Definition](#)

In this step you modify the Placeholder definition and view the results.

### [Step 5: View the User Segments and Create Users](#)

In this step you view the User Segments and create users.

### [Step 6: Login and View the Content Selector](#)

In this step you login to the WebLogic Administration Portal and see the Content Selector.

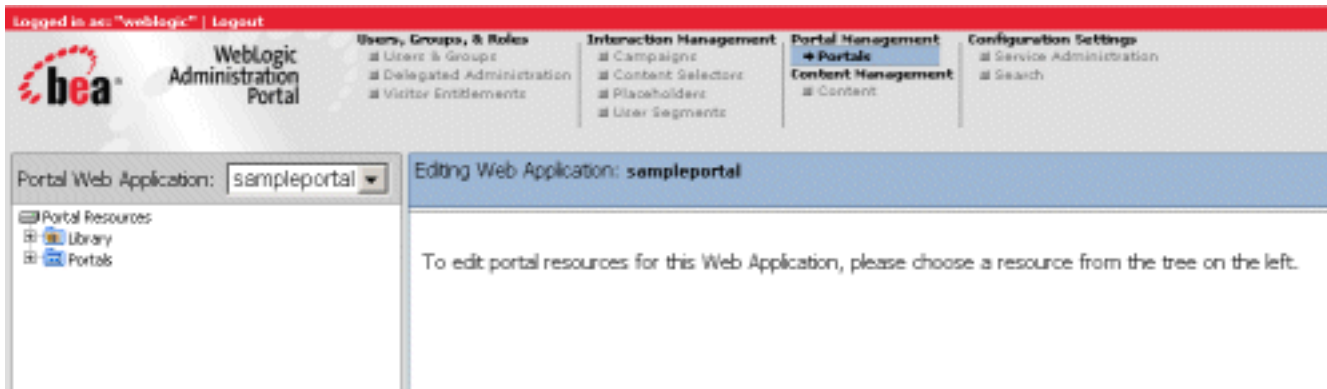


## Step 1: Start the WebLogic Administration Portal

In this step you will open the WebLogic Administration Portal to access the administration tools. If you completed any of the other tasks in the [WebLogic Administration Portal Tutorial](#), the WebLogic Administration Portal is already open, and you can move on to [Step 2](#) of this task.

To start the WebLogic Administration Portal:

1. Be sure your server is running. You can start the server from a start script called startWebLogic located in the <BEA\_HOME>/weblogic81/samples/domains/portal directory.
2. Choose Start ->**Programs** ->**BEA WebLogic Platform 8.1** ->**Examples** ->**WebLogic Portal** -> **WebLogic Administration Portal**.
3. Login using **weblogic** as the username and the password. You should now see the WebLogic Administration Portal.



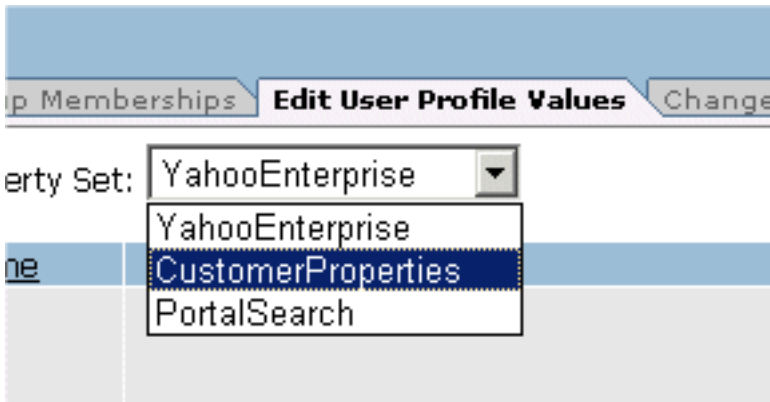
## Step 2: Edit a User Profile

In this step, you will edit a user profile so you can login and see a personalized portlet.

1. Select **Users and Groups** in the main navigation pane.



2. In the Browse User-Groups Resource tree, select **InternalUsers** -> **Employees**.
3. Select the **Edit Users** tab, and click **Show All Users in Group**.
4. Click the **MyEmployee** link, and make sure the **Edit User Profile Values** tab is selected in the Editor pane.
5. In the Property Set drop-down menu, select **CustomerProperties**.



6. Use the arrows at the bottom of the Editor pane to navigate to the **Customer Type** property.



Editing User: **MyEmployee**

[Edit Group Memberships](#) [Edit User Profile Values](#) [Change Login Password](#)

Properties from Property Set: **CustomerProperties**

Property Name	Value	Description
<input type="checkbox"/> Email		
<input type="checkbox"/> DefaultShippingAddressGeoCode		
<input type="checkbox"/> DefaultShippingAddressCounty		
<input type="checkbox"/> DefaultShippingAddressPostalCodeType		
<input type="checkbox"/> DefaultShippingAddressCountry		
<input type="checkbox"/> Title		
<input type="checkbox"/> Customer Type	Internal	

**Edit Value**

Text - Single Unrestricted

[Update Value](#)

☐ DefaultShippingAddressState

☐ MiddleName

☐ LastName

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[<](#) [>](#)

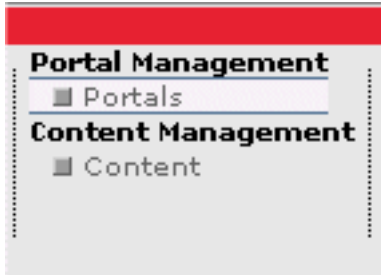
7. Expand the **Customer Type** property, and type **Internal** in the input field.
8. Click **Update Value**.



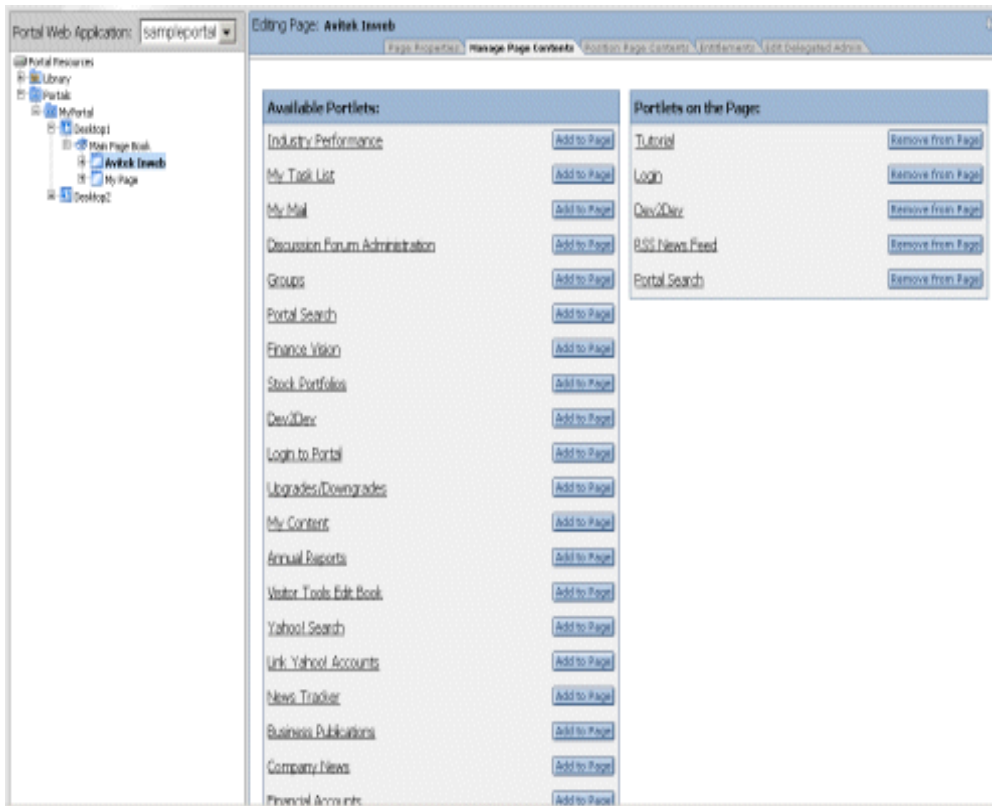
## Step 3: Add a Personalized Portlet to a Desktop

In this step you will add a pre-built portlet that demonstrates personalization to one of the desktops you created in [Task 2: Building a Portal](#).

1. Select **Portals** in the main navigation pane.



2. In the Portal Resource tree, select **Portals -> MyPortal -> Desktop1 -> Main Page Book -> Avitek Inweb**.
3. In the **Manage Page Contents** tab, locate **Tutorial** in the Available Portlets column. Click **Add to Page**.



4. Open a browser and go to the URL:  
<http://localhost:7001/sampleportal/appmanager/MyPortal/desktop1>.

On the desktop you should now see the newly added Tutorial portlet with a single image

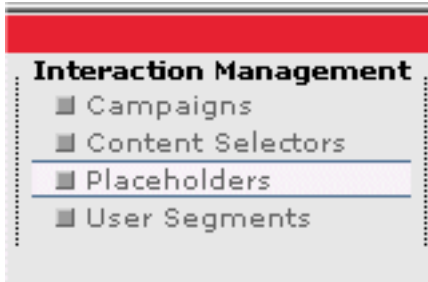
displayed within it. This image will change whenever the browser is refreshed, which is sometimes referred to as image rotation. Only the images that match the Placeholder definition will be displayed. In the next step we will change this definition and see the results.



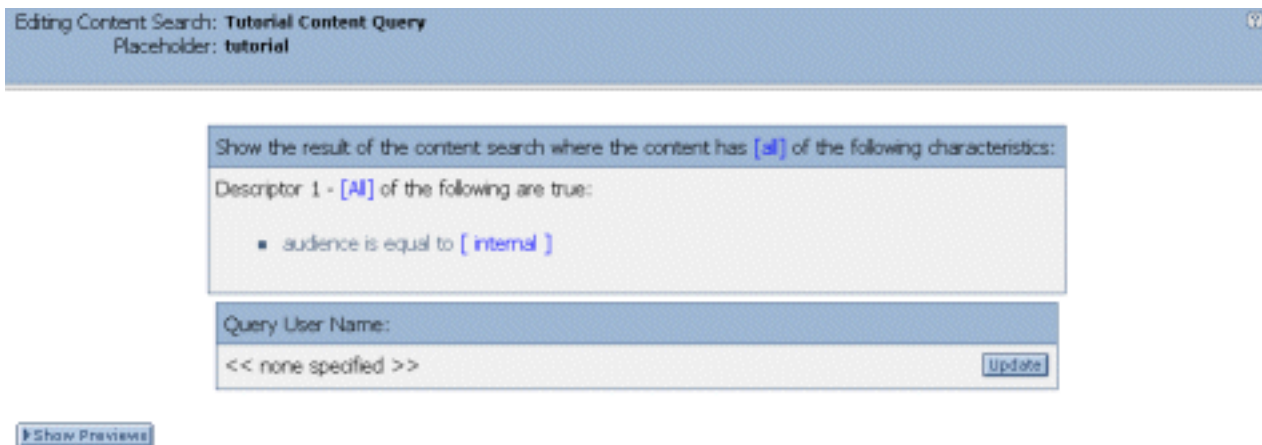
## Step 4: Modify the Placeholder Definition

In this step, you will change the definition of the Placeholder and view the results.

1. Select **Placeholders** in the main navigation pane.



2. In the Placeholders Resource tree, select **Placeholders -> tutorial -> Tutorial Content Query**. The following information should be available in the Editor pane:



3. Select the link **[ internal ]** to open the following dialog box:



4. Change this from internal to **external**, and click **Save Changes**. The content search definition should now reflect the newly selected value.
5. In the browser displaying the desktop used in the previous step, refresh the display to

see how the modified definition has changed what is displayed.

At this point you can see how easy it is to change the content that is displayed in a Placeholder. In the next steps you will learn how to easily personalize the contents of a portlet.



## Step 5: View the User Segments and Create Users

In this step you will view the two User Segments that have been provided for this tutorial. The User Segment definitions are initially created by the developer in WebLogic Workshop and can be modified using the WebLogic Administration Portal. You will also create two users that have the necessary characteristics to fit these classifications, used later to demonstrate personalization.

The tasks in this step are:

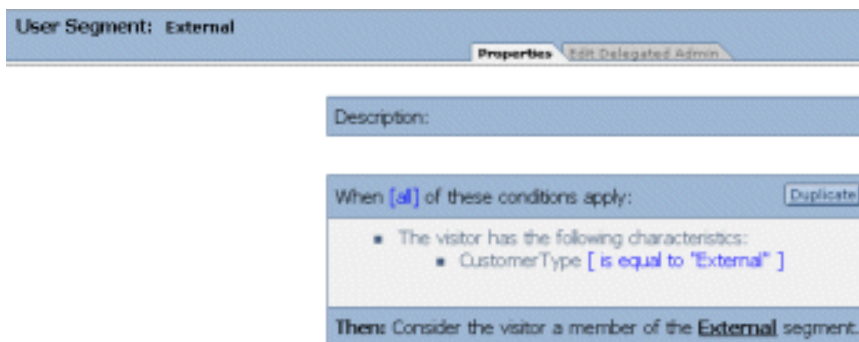
- [View the User Segments](#)
- [Create users](#)

### View the User Segments

1. Select **User Segments** in the main navigation pane.



2. In the User Segments Resource tree, select **User Segments -> External**.
3. Select the **Properties** tab to view the following definition:



4. For comparison, select **User Segments -> Internal** to display its definition:

Both of these User Segments are based on the value of the CustomerType property and are the simplest form. More sophisticated User Segments can be based on the characteristics of the visitor, session, or request.

## Create Users

1. Select **Users and Groups** in the main navigation pane.



2. In the Browse User-Groups Resource tree, select the **everyone (All Users)** node.
3. Select the **Add Users** tab, and click **Create New User** to open the Add a New User dialog.

4. In the Username field, enter **tutor1** and use the default password.
5. Click **Create New User**.

6. Click on the **tutor1** link, and select the **Edit User Profile Values** tab.

Editing User: **tutor1**

[Edit Group Memberships](#)
[Edit User Profile Values](#)
[Change Login Password](#)

Properties from Property Set: **YahooEnterprise**

Property Name	Value	Description
YahooId		Unique Yahoo! Enterprise Id for this user.
YahooAdministrator	weblogic	Username of the wls Administrator to be used to configure anonymous content.
DeploymentKey		Deployment key obtained from Yahoo!
DeploymentNumber		Deployment number obtained from Yahoo!
AnonymousModelAccount	ma_default	Model Account to be used for anonymous users.
DataServerBasename	data.corporate.yahoo.com	Basename for Yahoo! Data Server.
AnonymousYahooId		Unique Yahoo! Enterprise Id anonymous user.
AdminServerBasename	admin.corporate.yahoo.com	Basename for Yahoo! Admin Server.
EditServerBasename	edit.corporate.yahoo.com	Basename for Yahoo! Edit Server.
AnonymousIsLinked	false	Flag determining whether anonymous user been asked to link a Yahoo! account.

1 - 10 of 15  
 < >

7. In the Property Set drop-down menu, select **CustomerProperties**.

[Group Memberships](#)
[Edit User Profile Values](#)
[Change](#)

Property Set: **YahooEnterprise**

YahooEnterprise  
**CustomerProperties**  
 PortalSearch

8. Use the arrows at the bottom of the Editor pane to navigate to the **Customer Type** property.



Editing User: **tutor1** Help Create Group

[Edit Group Memberships](#) [Edit User Profile Values](#) [Change Login Password](#)

Properties from Property Set: **CustomerProperties**

Property Name	Value	Description
Email		
DefaultShippingAddressGeoCode		
DefaultShippingAddressCountry		
DefaultShippingAddressPostalCodeType		
DefaultShippingAddressCountry		
Title		
CustomerType		

**Edit Value**

Text - Single Unrestricted

[Update Value](#)

☐ DefaultShippingAddressState  
☐ MiddleName  
☐ LastName

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[<](#) [>](#)

9. Expand the **Customer Type** property, and type **Internal** in the input field.
10. Click **Update Value**.

Editing User: **tutor1** Help Create Group

[Edit Group Memberships](#) [Edit User Profile Values](#) [Change Login Password](#)

Properties from Property Set: **CustomerProperties**

Property Name	Value	Description
Email		
DefaultShippingAddressGeoCode		
DefaultShippingAddressCountry		
DefaultShippingAddressPostalCodeType		
DefaultShippingAddressCountry		
Title		
CustomerType	External	

**Edit Value**

Text - Single Unrestricted

[Update Value](#)

☐ DefaultShippingAddressState  
☐ MiddleName  
☐ LastName

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[<](#) [>](#)

11. Repeat steps 3-10, creating a user called **tutor2** and setting the value of the CustomerType property to **External**.



## Step 6: Login and View the Content Selector

In this step you will use the two users created in the previous step to login to the desktop. This allows the Content Selector to be evaluated and display the results of the expression. You will then make changes to the content and to the expressions to see the effects.

The tasks in this step are:

- [Login using the newly created users](#)
- [Change properties on content and view results](#)
- [Change Content Selector expressions and view results](#)

### Login Using the Newly Created Users

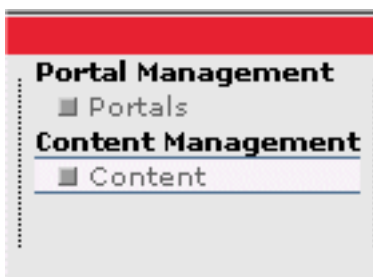
1. Open a browser and go to the URL:  
<http://localhost:7001/sampleportal/appmanager/MyPortal/desktop1>, and login as **tutor1**.

When logged in you should see one or more images in the Content Selector section of the tutorial portlet. The images displayed in the portlet are those that match the expression in the Content Selector, which is as follows:

In this step the user tutor1 is in the Internal segment and, therefore, satisfies the condition. The images displayed have the Audience property set to the value Internal and are displayed in the portlet. In the next tasks you will make changes that will cause different images to be displayed, demonstrating dynamic personalization of a site.

### Change Properties on Content and View Results

1. Select **Content** in the main navigation pane.



2. In the Content Hierarchy Resource tree, navigate to **BEA Repository -> Ads -> financial -> AdCampaign -> External -> collegePlanningCampaign.jpg**.
3. Select the **collegePlanningCampaign.jpg**, and select the **Create and Edit Content** tab.

#### 4. Locate the Audience property, and change the value to **external**.

audience	■ external	external ▼
----------	------------	------------

#### 5. Click **Update** to save the changes.

#### 6. Refresh the browser with the tutorial portal, and note the changes in how the set of images display.

You might want to try changing the values on other content to see the effects. Be sure to include at least some images with the Audience property set to Internal and some set to External in order for the tutorials to work.

This task demonstrates how the content properties are used to select what will be displayed. In your own portal applications you will have content that has your own properties, all of which can be used for personalizing a site. In the next task we will see the role of the user's properties can be used in a similar way.

### Change Content Selector Expressions and View Results

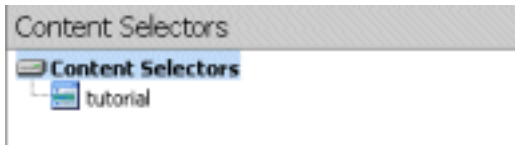
As demonstrated in the preceding task, dynamic personalization is fundamentally tied to the evaluation of expressions based on a variety of properties. The Content Selector that you have been using has two parts, the first for evaluating a condition and the second for choosing the appropriate content.

In this task you will change the values in this expression, causing different images to be displayed in the tutorial portlet. If you changed the properties for the content in the previous task, please make sure that there are at least some images with the Audience property set to Internal and some set to External. If these are not set then you will not see the expected results.

#### 1. Select **Content Selectors** in the main navigation pane.



#### 2. In the Content Selectors Resource tree, navigate to **Content Selectors-> tutorial**.

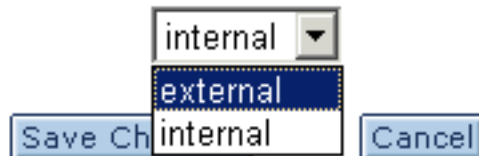


3. Open the expression editor by clicking on the **tutorial content selector**.
4. Next to **audience is equal to**, click on the value **Internal**.
5. Change the audience setting to **External**, and click **Save Changes**.



Qualifying items must match [ALL] value phrases.

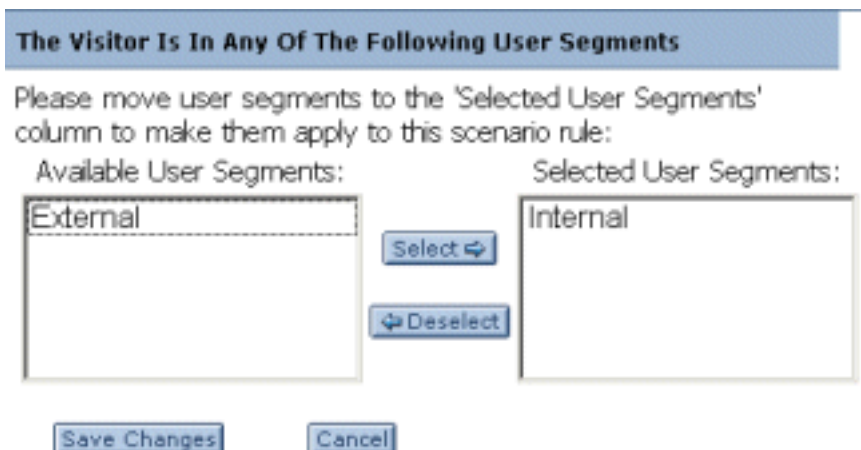
audience is equal to



6. In the browser displaying the tutorial desktop, refresh the display. If you have logged out, log back in as the user **tutor1**.

**Note:** The images displayed in the Content Selector section of the tutorial portlet will now be those that have the Audience attribute set to External.

7. In the WebLogic Administration Portal, select the **Properties** tab for **Content Selector - > tutorial**.
8. Next to **The visitor is in any of the following user segments** click on the value **Internal**.



9. Using the **Select** and **Deselect** buttons, swap the values so that the Selected User Segments column contains only the External segment, and click **Save Changes**.
10. Refresh the display again in the browser displaying the tutorial portal. The content query section of the tutorial portlet is now blank because the user tutor1 is not classified as part of the External segment. The condition evaluates to false and, therefore, no content is displayed.
11. Log out of the tutorial desktop and log back in as the **tutor2** user. You should now see images displayed in the Content Selector section of the tutorial portlet as the tutor2 user is classified as part of the External segment.

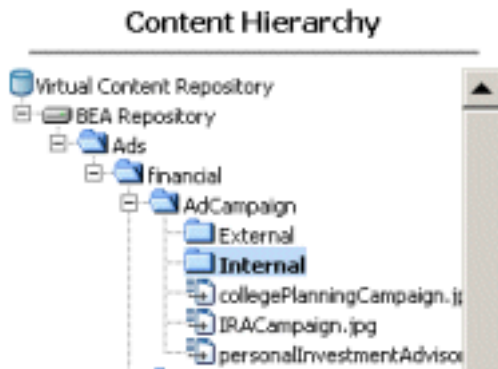
In this task we have explored the expression used for Content Selectors to see how user and content property values are evaluated to determine what will be displayed. By using the appropriate content properties, user properties, conditions, and selection expressions, users see content defined specifically for them. The WebLogic Administration Portal is designed to make it easy for the application owners to easily manage sites that provide a truly dynamic user experience.



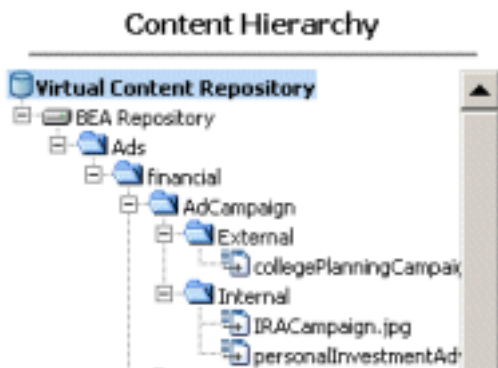
### Step 3: Edit Content Hierarchy and Content Properties

In this step, you will reorganize your content hierarchy and edit a content property.

1. In the Content Hierarchy Resource tree, navigate to the **AdCampaign** node.
2. Right click **AdCampaign** and select **Add Node**.
3. Name the node **External**, and click **OK**.
4. Repeat steps 1-3 to create another node inside the AdCampaign node and call it **Internal**. Your directory should look like this:



5. Right click **collegePlanningCampaign.jpg** and select **Move**.
6. Click the **External** node. The content item is now a child of the **External** node.
7. Click **IRACampaign.jpg**, and select **Move**.
8. Click the **Internal** node. The content item is now a child of the **Internal** node.
9. Click **personalInvestmentAdvisor.jpg**, and select **Move**.
10. Click the **Internal** node. The content item is now a child of the **Internal** node.



11. In the Content Hierarchy Resource tree, select **collegePlanningCampaign.jpg**.
12. Select the **Create and Edit Content** tab.
13. Scroll down to **Audience** property in the first column, and select **Internal** in the drop-down menu.
14. Click **Update** at the bottom of the screen to save your changes.

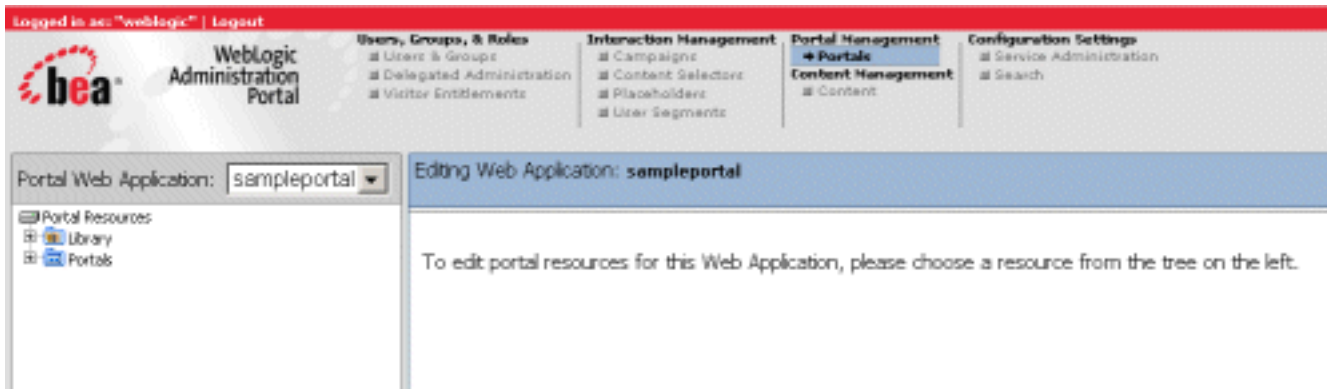


## Step 1: Start the WebLogic Administration Portal

In this step you will open the WebLogic Administration Portal to access the administration tools. If you completed any of the other tasks in the [WebLogic Administration Portal Tutorial](#), the WebLogic Administration Portal is already open, and you can move on to [Step 2](#) of this task.

To start the WebLogic Administration Portal:

1. Be sure your server is running. You can start the server from a start script called startWebLogic located in the <BEA\_HOME>/weblogic81/samples/domains/portal directory.
2. Choose **Start -> Programs -> BEA WebLogic Platform 8.1 -> Examples -> WebLogic Portal -> WebLogic Administration Portal**.
3. Login using **weblogic** as the username and the password. You should now see the WebLogic Administration Portal.





## Step 2: Add Hierarchy Nodes

You can add hierarchy nodes two different ways. For this tutorial, choose ONE of the following methods:

- [Add Hierarchy Nodes and Content with BulkLoader](#)
- [Add Hierarchy Nodes and Content with Portal Tools](#)

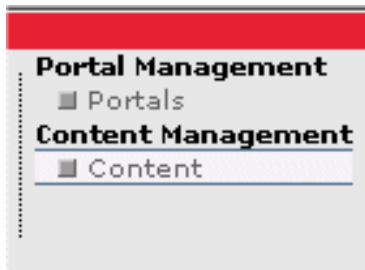
### Step 2a: Add Hierarchy Nodes and Content with BulkLoader

In this step, you will load content in batch mode via a command-line script called BulkLoader.

1. In your file system, navigate to the following directory:

<BEA HOME>\weblogic81\portal\bin

2. Double click **load\_cm\_data.cmd**. This will launch a command prompt window and load sample data into the BEA Repository.
3. To view changes, return to the WebLogic Administration Portal, and select **Content** in the main navigation pane.



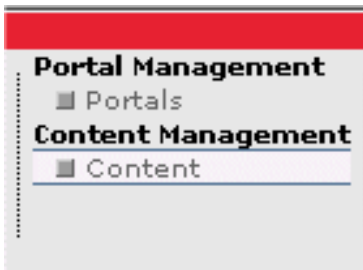
4. In the Content Hierarchy Resource tree, select the + icon to the left BEA Repository to expand the BEA Repository.
5. Select the + icon next to **Ads** -> **Financial** -> **Logos** nodes to fully expand the content hierarchy.



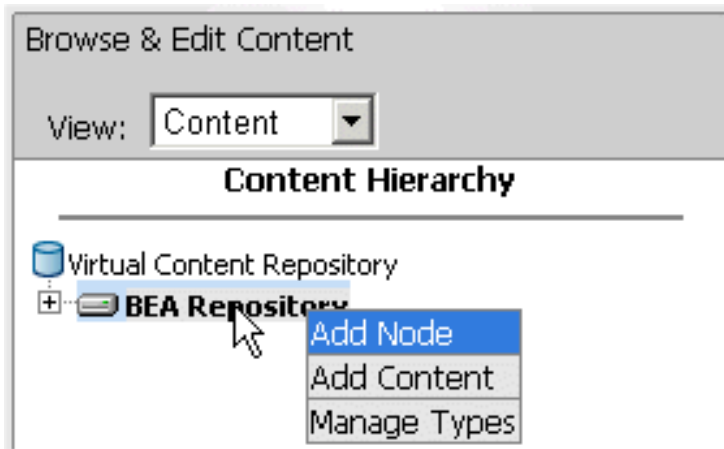
## Step 2b: Add Hierarchy Nodes and Content With Portal Tools

In this step, you will create hierarchy nodes and content using the WebLogic Administration Portal tools.

1. Select **Content** in the main navigation pane.



2. In the Content Hierarchy Resource tree, right click the **BEA Repository**.



3. Select **Add Node**, and name the node **Ads**. Click **OK**.

Please type the node name to be added under "BEA Repository"

Ads

OK Cancel

4. Right click on the newly-created **Ads** node and select **Add Node** again. Name the node **financial**.
5. Right click on the **financial** node, add a node, and name it **AdCampaign**. At this point, your hierarchy structure should look like this:

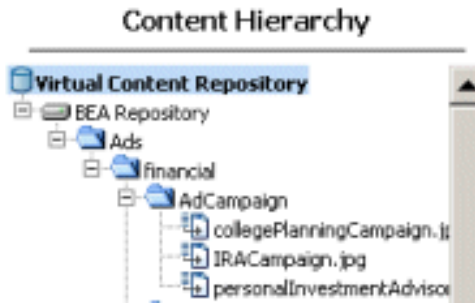


6. Right click the **AdCampaign** node and select **Add Content**. Name the content item **collegePlanningCampaign.jpg**.
7. Select the **Choose Type**, select the type named **ad**, and click **OK**.
8. Set the **Audience** property to **External**.
9. For the **content** property, click **Browse**. Navigate to the following directory:

<BEA HOME>\weblogic81\portal\db\data\sample\cm\_data\Ads\financial\AdCampaign

10. Select **collegePlanningCampaign.jpg** and click **Open**.
11. Click **Create**.
12. In the Content Hierarchy Resource tree, select **BEA Repository**.
13. Repeat steps 6 - 11 to add **IRACampaign.jpg** and **personalInvestmentAdvisor.jpg** to

the repository. Your content hierarchy should look like this:



## Task 6: Setting Up Delegated Administration Roles

The Delegated Administration feature facilitates localized administration of particular portal resources by designated portal administrators. For example, administration capabilities can be separately created and maintained for a company's Human Resources and Accounts Payable departments.

The portal resources (e.g. content or user groups) associated with these departments can be managed by particular administrators who are specified and empowered via the use of the WebLogic Administration Portal.

This task takes about 15 minutes to complete.

### Task Goals

At the end of this task you will have learned how to create Delegated Administration roles and how to associate these roles with particular portal resources.

### Task Overview

In this task, you will create two new administrator groups – InternalAdministrators and ExternalAdministrators. These groups will be used to house two administrators (users) – MyInternalAdministrator and MyExternalAdministrator. The two new groups will be associated with two Delegated Administration roles that you will create, called Internal and External.

The two new roles will be authorized to manage particular portal content, and the two user groups created in [Task 1, Setting Up Users and Groups](#). Finally, you will login as each of the two new administrators to see Delegated Administration in action.

### Steps in This Task

#### [Step 1: Start the WebLogic Administration Portal](#)

In this step, you open the WebLogic Administration Portal.

#### [Step 2: Create Two New Administrator Groups](#)

In this step, you create the two user groups which will contain portal administrators.

#### [Step 3: Create Two New Administrators and Add Them to the New User Groups](#)

In this step, you will create two administrators and place them in the new user groups.

#### [Step 4: Create Two Delegated Administration Roles](#)

In this step, you will get your first exposure to the Delegated Administration tools, creating two roles to associate with the newly created administrator groups.

#### [Step 5: Add New User Groups to New Delegated Administration Roles](#)

In this step, you will associate the administrator groups with the new Delegated Administration roles. As a result, you will implicitly give administration capabilities to all members of the administrator groups as defined by the administration roles.

#### [Task 6: Empower the New Roles to Manage Particular Portal Content](#)

In this step, you will associate the Delegated Administration roles with pieces of portal content, again implicitly empowering the newly created administrators.

#### [Step 7: Empower the New Roles to Manage User Groups](#)

In this step, you will associate Delegated Administration roles with portal resources – specifically, user groups.

#### [Step 8: See Delegated Administration in Action](#)

In this step, you will see the result of your efforts – Delegated Administration in action.

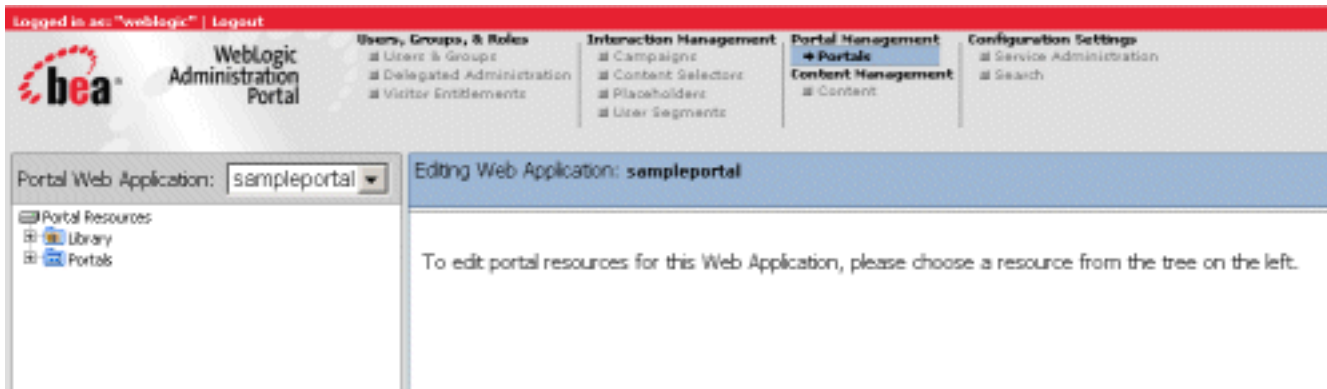


## Step 1: Start the WebLogic Administration Portal

In this step you will open the WebLogic Administration Portal to access the administration tools. If you completed any of the other tasks in the [WebLogic Administration Portal Tutorial](#), the WebLogic Administration Portal is already open, and you can move on to [Step 2](#) of this task.

To start the WebLogic Administration Portal:

1. Be sure your server is running. You can start the server from a start script called startWebLogic located in the <BEA\_HOME>/weblogic81/samples/domains/portal directory.
2. Choose **Start -> Programs -> BEA WebLogic Platform 8.1 -> Examples -> WebLogic Portal -> WebLogic Administration Portal**.
3. Login using **weblogic** as the username and the password. You should now see the WebLogic Administration Portal.



## Step 2: Create Two New Administrator Groups

In this step you will create two new administrator groups.

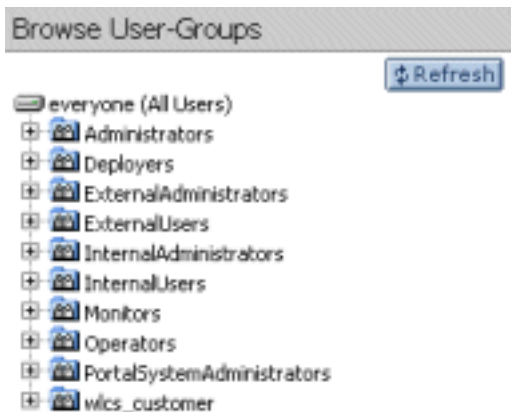
1. Select **Users and Groups** in the main navigation pane.



2. In the User-Groups Resource tree, right click the **everyone (All Users)** group.
3. Select **Add User-Group**. The following pop-up window appears:



4. Name the group **InternalAdministrators**, and click **Create**.
5. Repeat steps 2-4 to create a second group called **ExternalAdministrators**. The Resource tree should now include your new additions:



You have now created two groups that contain portal administrators whose authority will be specified as this tutorial continues.





### Step 3: Create Two New Administrators and Add Them to the New User Groups

1. In the User-Groups Resource tree, select the **InternalAdministrators** group.
2. Select the **Add Users** tab in the Editor pane.

Create New User

1  
Search

Search for User(s) **NOT** in this Group that you would like to **Add**.

Manual Search - Enter Login Name or Expression, then click "Search":

Quick Search - Find all Users NOT in Group whose login name starts with:  

Show All Users	A	B	C	D	E	F	G	H	I	J	K	L	M
NOT in Group	N	O	P	Q	R	S	T	U	V	W	X	Y	Z

2  
Select

Select User(s) from the Search Results.  
Results per page: 10  
Please search for Users in Step One.

3  
Add

Add the selected User(s).

3. Click **Create New User**.

Add a New User

Username:

Password:

Confirm Password:

(The default password is "password")

4. Name the user **MyInternalAdministrator** and click **Create New User**. The MyInternalAdministrator user is now added to the InternalAdministrators group.
5. Repeat steps 1-4 to create a user called **MyExternalAdministrator** in the **ExternalAdministrators** group.

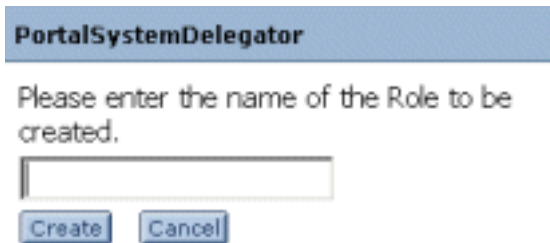


## Step 4: Create Two Delegated Administration Roles

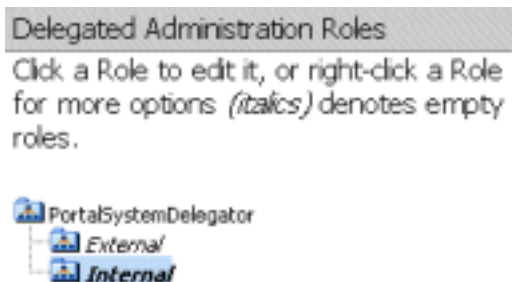
1. Select **Delegated Administration** in the main navigation pane.



2. In the Delegated Administration Roles Resource tree, right click the **PortalSystemDelegator** role, and select the **Add New Role**.



3. In the PortalSystemDelegator text box, type **External**, and click **Create**.
4. Repeat steps 2-5, this time creating a Delegated Administration role named **Internal**. The Resource tree should now include your new additions:

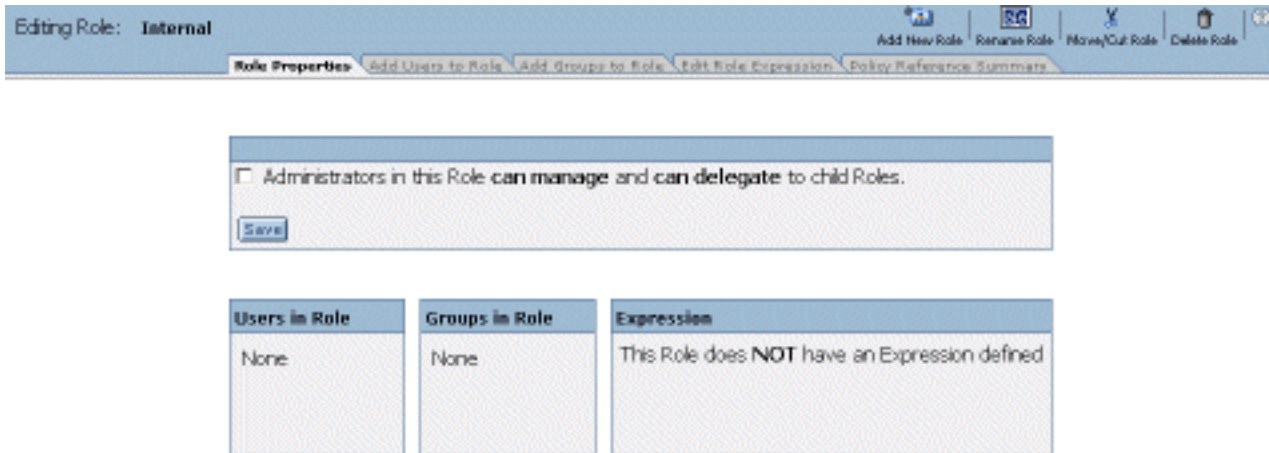


You have now created two new Delegated Administration roles that can be associated with particular portal resources.



## Step 5: Add New User Groups to New Delegated Administration Roles

1. In the Delegated Administration Roles Resource tree, click the **Internal** role. Because this is a new role, the Editor pane should appear as follows:



The Editor pane reflects that no user nor groups have been added to the role, and no expression has been created for it.

2. Select the **Add Groups to Role** tab. The Editor pane now displays the existing User Groups, including InternalAdministrators and ExternalAdministrators.
3. Click the arrow icon next to **InternalAdministrators**. The Editor pane now shows that this group is ready to be added to the Internal Delegated Administration role as follows:



4. Click the **checkbox** next to InternalAdministrators, and click **Add Groups(s) to Role**. InternalAdministrators has now been added to the Internal Delegated Administration role, and its arrow icon has been removed in the tree.
5. Click the **Role Properties** tab. The Editor pane now reflects that the InternalAdministrators group has been added to the Internal Delegated Administration role.

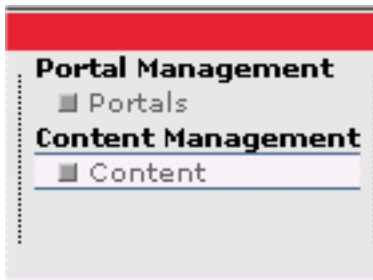
6. Repeat steps 1-5, adding **ExternalAdministrators** to the **External Delegated Administration** role.

You have now added two user groups to Delegated Administration roles. Any members of these two groups will have the administration authority assigned to their associated Delegated Administration roles.

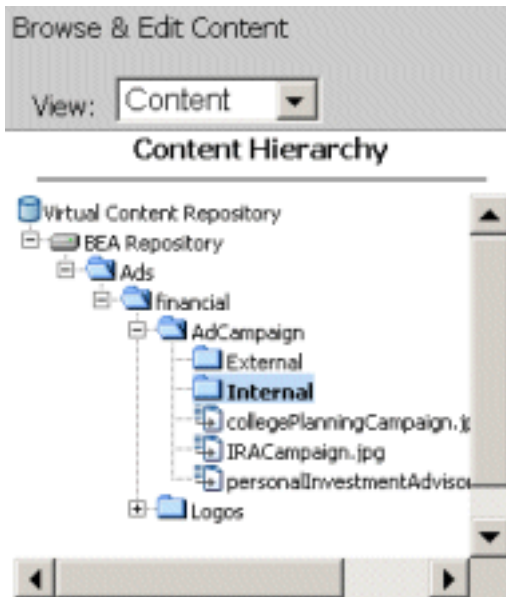


## Step 6: Empower the New Roles to Manage Particular Portal Content

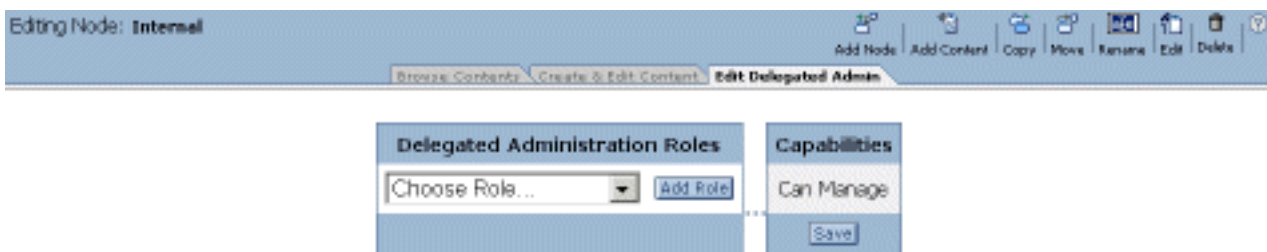
1. Select **Content** in the main navigation pane.



2. Above the Content Resource tree to the left, use the drop-down menu to select **Content**, if it is not already selected.
3. In the Content Resource tree, navigate to **BEA Repository -> Ads -> financial -> AdCampaign -> Internal**.



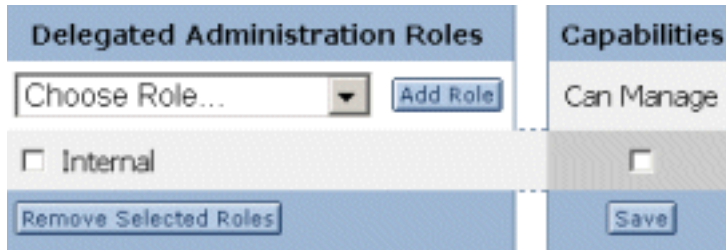
4. Select the **Edit Delegated Admin** tab at the top of the Editor pane.



The Editor pane indicates that there are no Delegated Administration roles assigned to Internal content folder.

5. Select **Internal** from the Delegated Administration Roles drop-down list, and click **Add Role**.

The Editor pane is updated to reflect the pending application of the Internal Delegated Administration role to the Internal content folder:



The screenshot shows two side-by-side panels. The left panel, titled 'Delegated Administration Roles', contains a dropdown menu with 'Choose Role...' and a downward arrow, an 'Add Role' button, a checkbox labeled 'Internal' which is checked, and a 'Remove Selected Roles' button. The right panel, titled 'Capabilities', contains a 'Can Manage' checkbox which is also checked, and a 'Save' button at the bottom.

6. Check the **Can Manage** box in the Capabilities area, and click **Save**.

You have now associated the Internal Delegated Administration role with the Internal content folder. Any users in the Internal Delegated Administration role (and earlier, all users belonging to the InternalAdminGroup placed in this role) now have the authority to manage the Internal content folder.

7. Repeat steps 4-6, associating the **External Delegated Administration** role with the **External** content folder.



## Step 7: Empower the New Roles to Manage User Groups

1. Select **Users and Groups** in the main navigation pane.



2. In the User Groups Resource tree, select the **InternalUsers** group.
3. Select the **Edit Delegated Admin** tab from the top of the Editor pane. The Editor pane indicates that no Delegated Administration roles have been associated with this user group:



4. Select **Internal** from the Delegated Administration Roles drop-down list, and click **Add Role**.

The Editor pane now indicates the pending association of the Internal Delegated Administration role with the InternalUsers User Group.

5. In the Capabilities area, click the check boxes under **Profile Admin**, **Read User/Group**, and **Create Update Delete User/Group**, and click **Save**.

The Editor pane now reflects the association of the Internal Delegated Administration role with the InternalUsers User Group:





The relationships between the user groups and the Internal Delegated Administration role are such that all members of the InternalAdministrators group are in the Internal Delegated Administration role. As a result, these users have the authority to manage all members of the InternalUsers user group.

6. Repeat steps 2-5, associating the **External Delegated Administration** role with the **ExternalUsers** group.



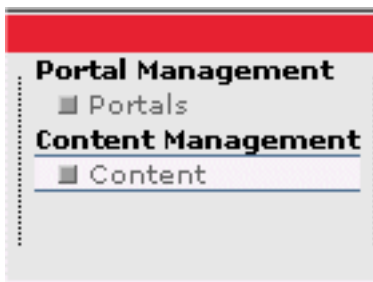
## Step 8: See Delegated Administration in Action

In this step, you will see Delegated Administration at work.

1. Click **Logout** at the top left corner of the WebLogic Administration Portal page.
2. Login again as **MyInternalAdministrator**. (The default password is “password.”)

The limited menu at the top of the page reflects the administration capabilities associated with the Internal Delegated Administration role.

3. Select **User & Groups** in the main navigation pane. The User-Group Resource tree shows only the InternalUsers group under everyone, indicating that MyInternalAdministrator only has administration authority for this group.
4. Select **Content** in the main navigation pane.



5. In the Content Resource tree, navigate to **BEA Repository -> Ads -> financial-> AdCampaign -> Internal**. The color of this node indicates that MyInternalAdministrator can manage this content node and this content node only.
6. Repeat steps 1-5 for **MyExternalAdministrator**, verifying this administrator's management capabilities.



## How Do I Add Content to My Portal?

Content is the key component of any portal. Content can be an image, a document, an animation, a sound file, and more. In the WebLogic Administration Portal, adding content to the portal repository involves:

- Adding a content node
- Creating a content item
- Specifying a content type
- Uploading the content

### **To add content to an existing repository:**

1. In the WebLogic Administration Portal, navigate to Content Management -> Content.
2. In the Content Hierarchy Resource tree, [add a new content node](#).
3. [Create a new content item](#) by clicking Add Content. You then name the content item and choose a [content type](#), such as an image or a message.
4. Provide a description of the content and specify the location of the content to upload.

### **Related Topics:**

- [Overview of Content Management](#)
- [Overview of Managing Content](#)
- [Overview of Managing Repositories](#)
- [Overview of Managing Content Types](#)

## Add a Content Item

As an administrator, you can add a new content item to the content management repository.

**Note:** When adding content to BEA's Virtual Content Repository, whether you are using the WebLogic Administration Portal Content Management tools or the Bulkloader, make sure you store your content for upload in a directory outside of the portal application if you deploy your application as an .ear file.

To add a content item:

1. In the Browse & Edit Content Resource tree, select the repository where you want to create the content item.
2. In the Create and Edit Content pane, click Create Content Item.
3. In the Name field, enter the name for the new content item.
4. From the Type List box, click on the type you want to associate with the content item.
5. Enter the information requested as dictated by the type selected.
6. Click Create.

The new content item should display in the Resource tree.

Related Topics:

- [Copy a Content Item](#)
- [Delete a Content Item](#)
- [Edit Content](#)
- [Move a Content Item](#)
- [Rename a Content Item](#)

## Copy a Content Item

As an administrator, you can copy a content item to another location in the repository.

To copy a content item:

1. In the Browse & Edit Resource tree, right click on the content item you want to copy.
2. Select Copy from the pop-up menu.
3. Click on the node in the Resource tree where you want to copy the content item.
4. Verify that the content item was copied by clicking on the node where you copied the content item.

Related Topics:

- [Add a Content Item](#)
- [Delete a Content Item](#)
- [Edit Content](#)
- [Move a Content Item](#)
- [Rename a Content Item](#)

## Delete a Content Item

As an administrator, you can delete a content item from a node within the repository.

To delete a content item:

1. In the Browse & Edit Content Resource tree, right click on the content item you want to delete.
2. In the pop-up menu, select delete.
3. A pop-up window appears confirming that you want to delete the item and all its children. Click OK to continue with deleting the item.

The item is then removed from the Resource tree.

Related Topics:

- [Add a Content Item](#)
- [Copy a Content Item](#)
- [Edit Content](#)
- [Move a Content Item](#)
- [Rename a Content Item](#)

## Edit Content in the Repository

As an administrator, you can modify content in the repository according to the definitions allowed by the type.

To edit content in the repository:

1. In the Browse & Edit Content Resource tree, right click on the content item you want to edit.
2. In the pop-up menu, select Edit.
3. In the Update Content Item window, edit the appropriate field as dictated by chosen type.
4. Click Update.

**Note:** If the content item has a type associated with it, ensure that all the required values marked with an asterisk (\*) are filled in and click Update to apply the changes. If the content item does not have a type associated with it, select a type to associate with the content item.

Related Topics:

- [Add a Content Item](#)
- [Copy a Content Item](#)
- [Delete a Content Item](#)
- [Move a Content Item](#)
- [Rename a Content Item](#)

## Move a Content Item

As an administrator, you can move a content item from one location to another within the repository.

To move a content object:

1. In the Browse & Edit Content Resource tree, right click on the content item you want to move.
2. In the pop-up menu, select move.
3. In the Resource tree, click on the node where you want to move the content item.
4. Verify the content item was moved by clicking on the node where you moved the content item.

### Related Topics:

- [Add a Content Item](#)
- [Copy a Content Item](#)
- [Delete a Content Item](#)
- [Edit Content](#)
- [Rename a Content Item](#)



## Rename a Content Item

As an administrator, you can rename a content item in the repository.

To rename a content item:

1. In the Browse & Edit Content Resource tree, right click on the content item you want to rename.
2. From the pop-up menu, select Rename.
3. In the pop-up window, enter in the new name for the content item and click OK.

The Resource tree now shows the new name for the content item.

Related Topics:

- [Add a Content Item](#)
- [Copy a Content Item](#)
- [Edit Content](#)
- [Move a Content Item](#)
- [Delete a Content Item](#)

## Overview of Managing Types

Types, or schemas, define the shape of the data that makes up a content object. Types are associated at the repository level. The administrator can create types in BEA Systems repositories and third-party repositories that support this feature.

Type properties can be string, integer, Boolean, double, calendar, or binary. They can also be single unrestricted, single restricted, multiple unrestricted, or multiple restricted. The administrator gives each property a name. Settings for each property include required, read-only, and default values.

The administrator can set the property as explicit, storing the property in a horizontal format to limit the number of joins in content queries. Types do not have to include a binary, although a common example of a type is a single binary with a set of non-binary properties that describe the document.

Administrators can define default values for properties. To be used with Interaction Management, Content Nodes need a primary property that will be rendered as a result of an action.

### Related Topics:

- [Overview of Content Management](#)
- [Overview of Managing Repositories](#)
- [Overview of Managing Content](#)

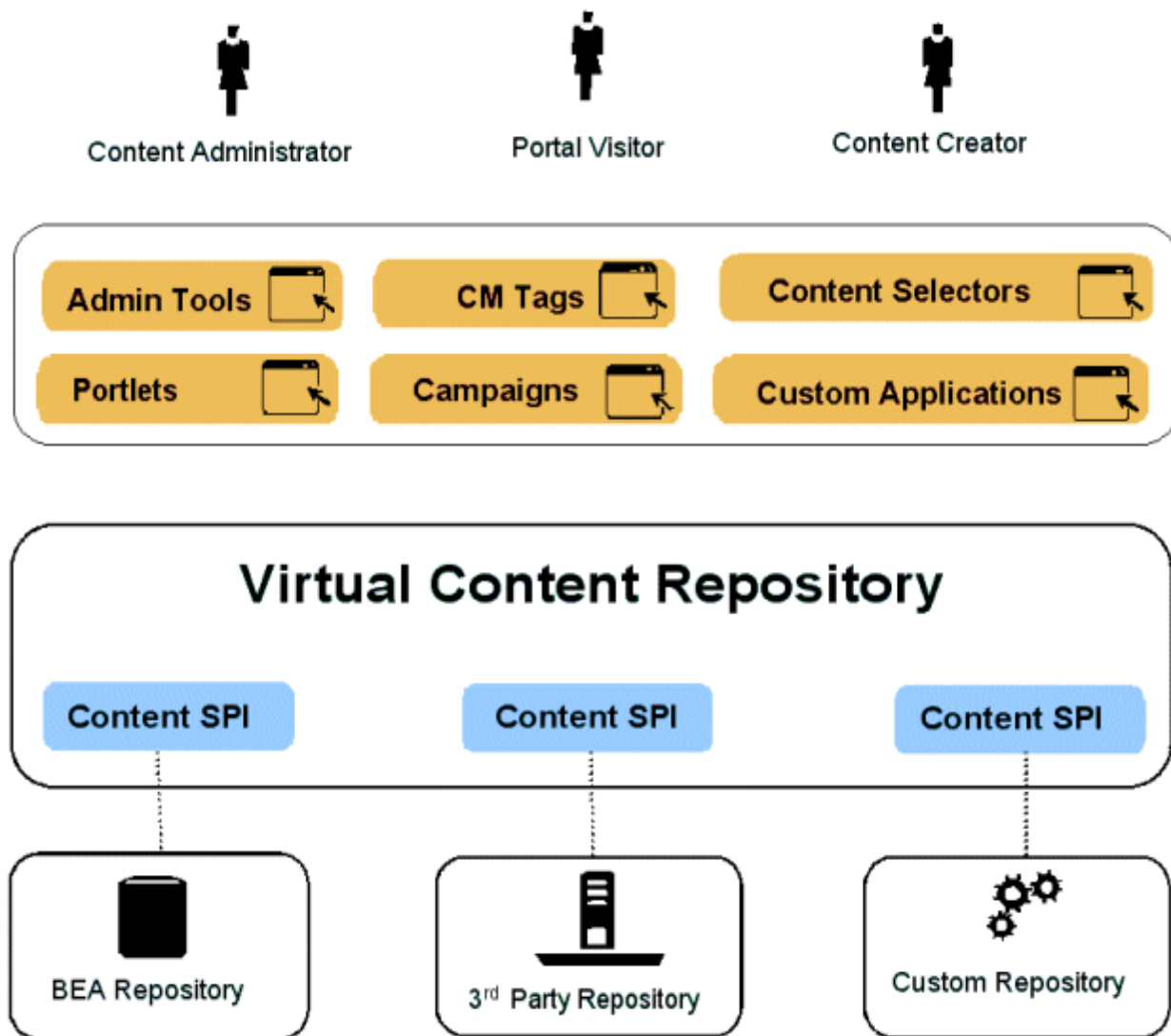
# Overview of Content Management

The content you want to show users, whether it is a single line of text, an HTML file, a graphic, or an animation file can be stored in a content repository. BEA's Virtual Content Repository, included with WebLogic Portal, provides a single interface that lets you store content in BEA repositories as well as seamlessly incorporate BEA-compatible third-party content management systems. This overview provides information on the following subjects:

- [The Virtual Content Repository](#)
- [Content Hierarchy](#)
- [Content Types](#)
- [Creating and Modifying Content](#)
- [Using Content in Personalized Applications](#)

## The Virtual Content Repository

The Virtual Content Repository can contain multiple content repositories. It provides services such as federated search (a search that returns a result set from all the relevant content across the plugged in repositories), content lifecycle management, [Delegated Administration](#) and [content type](#) management. Many Portal subsystems interact with the Virtual Content Repository. Content Management tags execute queries to deliver dynamic content to end users. [Content Selectors](#) and [Campaigns](#) deliver dynamic, personalized content to user based upon personalization rules or conditions.



## The Content Hierarchy

WebLogic Portal Content Management is organized hierarchically. The Virtual Content Repository (VCR) is the top-level node in the content management system. Repositories are the immediate children of the VCR. These repositories can be made up of multiple BEA Systems repositories, multiple third-party repositories, or custom content repositories.

Hierarchy Nodes and Content Nodes comprise the next level of the hierarchy tree and are organized much like a file system. Hierarchy Nodes can contain both Hierarchy Nodes and Content Nodes. Content Nodes can only contain other Content Nodes. Nodes can be created based upon Content Types. For example:

### Virtual Content Repository

## Repository 1

### Hierarchy Node

ContentNode (index.htm)

ChildContent1 (logo.gif)

ChildContent2 (photo.jpg)

**Content Repositories** provide the storage mechanism for content, and they comprise the second-level of the Virtual Content Repository hierarchy. Content Repositories may include multiple instances of BEA repositories, 3rd party repositories, or customer repositories. To plug into the Virtual Content Repository, you must implement the BEA Content Management Service Provider Interface – the CM SPI. See the `com.bea.content.spi` package in the WebLogic Portal [Javadoc](#).

**Hierarchy Nodes** are organizational mechanisms that help you organize and group content in the hierarchy, much like folders in a file system. Hierarchy Nodes can contain other Hierarchy Nodes as well as Content Nodes. They can also be typed so that they function similarly to Content Nodes.

**Content Nodes** represent content stored in the repository. A complete content node comprises a set of data property values defined by a content type. This data structure may include files such as a word processing document, HTML file, spreadsheet or image. It may also include metadata such as the author, version number or summary. Content Nodes can also have child Content Nodes. For example, The Content Node for an HTML document may have child Content Nodes for the images used by the HTML document.

## Content Types

Content Types define the set of properties that make up a Content Node or Hierarchy Node. This may include any combination of the supported data types, such as date and time, number, text (string), Boolean (true/false), or binary (file).

For example, the Content Type for image content may have a number property "width" and a number property "height," while the Content Type for news article content may have a text property "Author", a text property "Summary", a date property "Published Date", and a binary property "Article" for a file containing the formatted article. Types do not have to include a binary, although a common example of a type is a single binary with a set of non-binary properties that describe the document.

## Repository 1

### Content Type 1

Property 1 = Binary

Property 2 = String

### Content Type 2

Content Types also define the available values for a given property, including whether it can contain multiple values. For example, a property called "Priority" may only allow a single choice among the values "High", "Medium", and "Low", while a property called "Favorite Color" may allow multiple pre-defined values to be chosen.

Each repository has its own set of content types. You can create types in BEA repositories and third-party repositories that support this feature.

## Creating and Modifying Content

After you connect a BEA-compatible content management system to the Virtual Content Repository you can continue to add and modify content directly in your BEA-compatible content management system. Changes appear automatically in the Virtual Content Repository. You can create and manage content in the Administration Portal, in the My Content Portlet, or with the bulkloader.

- **[WebLogic Administration Portal](#)**  
BEA's Virtual Content Repository, available in the WebLogic Administration Portal under "Content Management," lets you add and modify content nodes and assign types (metadata) to those nodes. Through these tools, you can manage content in all the repositories plugged into the Virtual Content Repository that support management functions.
- **[Bulkloader](#)**  
The BulkLoader is a command-line application that is capable of loading document metadata into the reference implementation database from a directory and file structure. The BulkLoader parses the document base and loads all the document metadata so that the Content Management component can search for documents.
- **[My Content Portlet](#)**  
My Content portlet provides you with tools to manage your content in the BEA Virtual

**Content Repository.** You can create, update, and delete content directories and nodes as well as browse content hierarchies and search for content.

# Using Content in Personalized Applications

WebLogic Workshop extensions support development of personalized applications, while the WebLogic Administration Portal enables portal administrators to adapt site interaction to fit the needs of the audience. The core of the [Personalization](#) system is the underlying rules engine that matches users with appropriate content. [Content Selectors](#), [Placeholders](#) and [Campaigns](#) are the aspects of content management visible to administrators. Also, [User Segments](#) contain the criteria that define the target visitor, such as gender or browser type.

The Content Management component provides the run-time API by which content is queried and retrieved. The functionality of this component is accessible via tags. The content retrieval functionality is provided using either the provided reference implementation or third-party content retrieval products.

## Related Topics

- [Overview of Delegated Administration](#)
- [Overview of Personalization](#)
- [Overview of Users and Groups](#)
- [Overview of Visitor Entitlement](#)

## Overview of Managing Repositories

WebLogic Administration Portal enables you to create and manage repositories within your content management system.

Using the WebLogic Administration Portal, you can add, move, and remove repositories, change repository names, modify the connection class, and change the user name and password.

### Related Topics:

- [Overview of Content Management](#)
- [Overview of Managing Types](#)
- [Overview of Managing Content](#)



## Overview of Managing Content

Content is a collection of data describing an idea, object, or document. Content can include one or more documents or binary files and metadata. Binaries can include any file type and character set. In technical terms, content is an instantiated type.

A key component of any portal is its content. WebLogic Portal provides content by using a Content Manager. A Content Manager provides content and document management capabilities for use in personalization services to target users with dynamic Web content.

The Content Manager works with files or with content managed by third-party vendor tools. While administering portal resources, you will have to manage content so that the user has access to the most relevant content available.

### Related Topics:

- [Overview of Content Management](#)
- [Overview of Managing Types](#)
- [Overview of Managing Repositories](#)

## Delegated Administration Overview

Delegated administration provides a mechanism for propagating WebLogic Administration Portal privileges down a [hierarchy of roles](#). A Delegated Administration role is a dynamic classification of users based on user name, group membership or by the user's characteristics (or expressions), such as user profile values or time.

In your organization, you might want individuals to have different rights of access to various administration tasks and resources. For example, a system administrator might have access to every feature in the administration portal. The system administrator might then create a portal administrator role that could manage portal resources, and a library administrator role that can manage your portal resource library. A role policy consists of a role name and role definition.

Delegated Administration roles are mapped to administrative functions on portal resources using security policies. Given the appropriate rights, administrators can delegate both the right to administer a given resource capability and the right for the delegatee to delegate further. For more information on role policies and security policies, see the [Overview of Security](#).

### Setting Up an Administrative Role

You can create Delegated Administration roles at any time; however, the following process shows all of the steps in a process that ensures your administrators are set up correctly:

1. Model your Delegated Administration hierarchy to fit the needs of your organization.
2. [Create a Role for each administrator type](#).
3. Define the role three ways:
  - [Add individual users to a role](#)
  - [Add a group of users to a role](#)
  - [Add users by expressions \(attributes\)](#)
4. Assign Delegated Administration rights to various resources:
  - [Users and groups](#)
  - [Portal objects](#)
  - [Interaction Management objects](#)
  - [Content Management objects](#)

### Related Topics:

- [How Do I Set Up a New System Administrator?](#)

- [How Do I Entitle Users to See Specific Parts of My Portal?](#)
- [How Do I Add Content to My Portal?](#)
- [Overview of Delegated Administration Role Hierarchy](#)
- [Overview of Users and Groups](#)
- [Creating a New User](#)
- [Creating a New Group](#)

## Overview of Content Selectors

A Content Selector is a mechanism that, under a certain set of conditions, queries the content management system for documents. The Content Selector returns an array of content and content metadata. This allows you to define the conditions under which specific content can be viewed by a visitor to a Web site.

State content displays regardless of a user query. No user query update is required in the WebLogic Administration Portal in order to conduct a content preview. This rule usually only returns one content item to the same specific user.

Dynamic content displays based upon a user query. Different users will see different content. The user query field must be updated with a specific username in order to conduct a content preview in the WebLogic Administration Portal.

Content selectors are key in delivering personalized content to visitors. Developers can define and place Content Selectors in a JSP in WebLogic Workshop. Administrators then use the WebLogic Administration Portal to set parameters for the Content Selectors to change both whom is targeted by the content and what content is delivered.

### Related Topics:

- [Modify a Content Selector](#)
- [Assign Interaction Management Resources to a Delegated Administration Role](#)
- [Remove Interaction Management Resources from a Delegated Administration Role](#)

## Overview of Campaigns

Campaigns provide the mechanism for driving online behavior and personalization toward specific business goals. Campaign management enables you to activate and deactivate Campaigns based on time and date information, business goals, and individual interaction with the site.

Named groups of scenarios work together to form a Campaign. A scenario is composed of multiple Campaigns actions that can:

- Show users specific pieces of Web content on a page or in a portlet through a Placeholder
- Give users a discount
- Automatically send users a predefined, dynamic email message

Developers and administrators work together to build Campaigns. Developers build the infrastructure by placing Placeholder tags in JavaServer Pages (JSPs) and supplying email and Campaign templates. Administrators specify the conditions governing the Campaign, including target User Segments and start and stop criteria.

### Related Topics:

- [Duplicate or Modify a Campaign](#)
- [Modify a Content Action](#)
- [Modify a Discount Action](#)
- [Modify an Email Action](#)
- [Preview a Modified Campaign Action](#)
- [Assign Interaction Management Resources to a Delegated Administration Role](#)
- [Remove Interaction Management Resources from a Delegated Administration Role](#)

## Overview of Interaction Management

Interaction Management enables you to develop, manage, and measure personalized portal applications. Personalization and Campaign management combine to form the foundation of Interaction Management. These functions help you target content to a desired audience.

WebLogic Workshop extensions support development of personalized applications, while the WebLogic Administration Portal enables administrators to adapt site interaction to fit the needs of the audience. The core of the Interaction Management system is the underlying rules engine that matches users with appropriate content. [Content Selectors](#) and [Placeholders](#) are the aspect of Interaction Management visible to administrators. [User Segments](#) contain the criteria, such as gender or browser type, that define the target visitor.

Administrators have control over the personalized content displayed in a portal by defining rules for Content Selectors and Placeholders. Content Selectors are rules that target specific content stored in a content repository to specific site visitors. Placeholders are rules that control which content is displayed on a Web page. Placeholders are primarily used to display images and can only display a single content item and its properties at one time. Content Selectors are used to render arrays of content items and their properties.

By using Interaction Management tools, you reduce the effort needed to maintain a personalized site. Users are grouped into User Segments based on individual attributes.

Interaction Management solves the problems of information overload and the proliferation of audience-specific sites. It accommodates the delivery of the right content to the right person at the right time. Using the browser-based tools, administrators directly modify Campaigns, Content Selectors, Placeholders, and User Segments. Administrators interact indirectly with event tracking in the tools by using events as a predicate for personalization.

### Related Topics:

- [Overview of Campaigns](#)
- [Overview of Placeholders](#)
- [Overview of Content Selectors](#)
- [Overview of User Segments](#)

## Overview of Placeholders

A Placeholder defines a spot on a page to render a single piece of content at any one time. Developers use Placeholder tags to build personalized pages.

Both Campaigns and default ad queries populate the Placeholder ad bucket with content from the Virtual Content Repository which is the top-level node in the WebLogic Portal content management system. Placeholders use the ad bucket and presentation rules to rotate content for display. This content can play an integral part in a Campaign.

Administrators can manage the content that populates Placeholders by modifying the default Placeholder query or modifying Campaigns.

### Related Topics:

- [Modify a Placeholder](#)
- [Assign Interaction Management Resources to a Delegated Administration Role](#)
- [Remove Interaction Management Resources from a Delegated Administration Role](#)

## Overview of User Segments

As an administrator, you can target visitors with Web content and Campaigns by defining and using groups called User Segments. These User Segments are not just static lists of users. User segments dynamically group users based on characteristics, such as group membership, browser type, profile values, and other user properties.

If visitors match the defined characteristics, they are automatically members of that user segment and are shown the specific Web content that you determine or are targeted with Campaign actions that you create.

A User Segment is a grouping of users based on common characteristics gathered from their profiles and context (for example, session, request, and online behavior) used to drive personalization.

As an administrator, you use the WebLogic Administration Portal to dynamically group users. User segments can be used repeatedly in Content Selectors, Placeholders, and Campaigns.

### Related Topics:

- [Modify a User Segment](#)
- [Duplicate a User Segment](#)
- [Assign Interaction Management Resources to a Delegated Administration Role](#)
- [Remove Interaction Management Resources from a Delegated Administration Role](#)



## Overview of Users and Groups

The WebLogic Administration Portal supports management of two primary types of users: portal administrators and portal end users (visitors). An administrator uses these administration tools to manage portal content and portal users, and to build portals with existing portal resources. A visitor is an end-user of the portal built with these tools.

As an administrator of users, you can combine users into user groups to simplify management and administration of users. Groups allow you to create logical groupings of users so you can classify several users at one time with similar entitlements and segments. The ability to group users allows you to deal with large sets of users at one time.

A child group is a subset of a higher-level group (parent). A subgroup inherits the properties of the parent group but can contain unique properties. The system at large allows you to model your organizational hierarchy into a collection of groups and subgroups to whatever depth you need. This makes it easy for you to structure your users into groups and subgroups that look like your organization, thus making it easier for you to manage those users. For more information about groups and subgroups, see the [Overview of Group Hierarchy](#).

Administrators need to know who has access to the particular resources and must be able to change this access to suit the demands of the applications. This includes adding, removing, and changing the users and groups using the administration tools or using external systems.

In the case of the Unified User Profile (UUP), the user profile properties will be stored in an external system. You can use pre-existing users and groups in an existing portal database or in an external system such as an LDAP server. For more information on user information, see the [Overview of User Profiles and Property Sets](#).

### Related Topics:

- [Overview of Delegated Administration](#)
- [Overview of Security](#)
- [Overview of Interaction Management](#)
- [Overview of Visitor Entitlements](#)

## Overview of Visitor Entitlements

Visitor Entitlements are a mechanism for determining who may access the resources in an application and what they may do with those resources. This access is based on the role that a visitor to an application is in, allowing for flexible management of the resources.

A user visiting an application is assigned a role based on an expression that can include their name, the group that they are in, the time of day, or characteristics from their profile. For example, the "gold member" role could be assigned to a user because they are part of the frequent flyer program and have flown more than 50,000 miles in the previous year. This role is dynamically assigned to the user when they log into the site.

You can set Visitor Entitlements for a resource by adding one or more roles and set the capabilities for those roles. The resources that can be entitled within a portal application include [desktops](#), [books](#), [pages](#), [look and feels](#), and [portlets](#). Each of these has capabilities that are based on the type of resource, as in the following table:

	View	Minimize	Maximize	Edit	Remove
Desktop	X				
Book	X	X	X		
Page	X				
Look & Feel	X				
Portlet	X	X	X	X	X

**View:** The "View" capability will determine whether or not the user will be able to see the resource.

**Minimize/Maximize:** The "Minimize" and "Maximize" capabilities determine whether or not the user is able to minimize or maximize the portlet or book. Note that this applies to books within a page, not to the primary book.

**Edit:** The "Edit" capability determines whether or not the user is able to edit the resources's properties.

**Remove:** The "Remove" capability determines whether or not the user is able to remove the portlet from a page.

Related Topics:

- [Overview of Delegated Administration](#)

- [Overview of Portal Administration](#)
- [Overview of Users and Groups](#)
- [Overview of Interaction Management](#)
- [Overview of Content Management](#)

## How Do I Organize Content?

Content is a key component of any portal. WebLogic Administration Portal delivers content capabilities that support personalization services that target users with dynamic Web content and collaborative scenarios that allow users to share content.

Because of the volume of content contained with a Content Management System, it is important to organize content. You do this by establishing a content hierarchy. This is done in the Content Management section of the Administration Portal.

To organize content in a structured hierarchy:

1. [Create content repositories](#) within the Virtual Content Repository. Think about logical organizational structures and names for these repositories. For example, a repository called Images could contain graphic image files, while a repository called Animations could contain Flash or GIF animation files.
2. [Create content nodes](#) within the repositories or other content nodes.
3. [Add content items](#) to the repositories or content nodes.
4. [Manage repositories](#) to edit repository names, connection classes, usernames, passwords, and more.
5. [Manage content](#) by moving content items from one repository or node to another.

Related Topics:

- [Overview of Content Management](#)
- [Overview of Managing Repositories](#)
- [Overview of Managing Content](#)

## Add a New Repository

WebLogic Administration Portal enables you to add a new repository.

To add a new repository:

1. In the Browse & Edit Content Resource tree, right click on the Virtual Content Repository.
2. Select Create Repository from the pop-up menu.
3. In the Editor pane, provide the following information:
  - Repository Name
  - Connection Class
  - User Name
  - Password
4. If the new repository is a BEA repository, check the box and provide:
  - The NodeOpsHome
  - The ObjectClassOpsHome
5. Click Create.

A summary of the new repository information is displayed in the Editor pane, and can be edited if needed.

Related Topics:

- [Edit a Repository](#)
- [Remove a Repository](#)

## Edit Repository Information

WebLogic Administration Portal enable you to modify repository information for repositories within your content management system.

To modify a repository:

1. In the Browse & Edit Content Resource tree, right click on the repository you want to modify or click on the appropriate repository and click Edit in the right window.
2. In the Change Repository Configuration window on the right, modify the following information as needed:
  - Repository Name
  - Connection Class
  - User Name
  - Password
3. Click Update.

A summary of the edited repository information is displayed in the Editor pane, and can be edited or removed if needed.

Related Topics:

- [Create a New Repository](#)
- [Remove a Repository](#)

## Remove a Repository

As an administrator, you can delete a content repository from your content management system.

To remove a repository:

1. In the Browse & Edit Content Resource tree, right click on the repository you want to remove.
2. Select Remove from the pop-up menu.
3. A pop-up window displays confirming that you want to remove the repository. If you want to proceed, click OK.

**Note:** Removing a repository does not remove the contents of that repository.

The repository should no longer appear in the Resource tree.

Related Topics:

- [Edit a Repository](#)
- [Create a New Repository](#)

## Add a Content Node

As an administrator, you can add a new content node within a repository to better organize and manage content.

To add a content node:

1. In the Browse & Edit Content Resource tree, select the repository or content node in which you want to create a new content node.
2. In the Browse Contents tab in the Editor pane, click the Add Node icon.
3. In the pop-up window, enter the name for the new content node, and click OK.

The content node now appears in the Resource tree as a child to the parent repository or content node.

Related Topics:

- [Copy a Content Item](#)
- [Delete a Content Item](#)
- [Edit Content](#)
- [Move a Content Item](#)
- [Rename a Content Item](#)



## How Do I Personalize and Update Content?

You can personalize content for specified users by using the Interaction Management area of the WebLogic Administration Portal. There you can:

- Modifying a [placeholder](#) by changing the content query
- Modifying a [content selector](#) by changing the content query
- Modify a [user segment](#) that defines certain desired user traits
- Modifying the portal using the WebLogic Visitor Tools in a Web browser

### Placeholders

Placeholders allow you to target content to a desired user. By changing a Placeholder parameter, you can modify content that displays in a portal. You can also modify a Placeholder by uploading new content for display. For more information, see [Modify a Placeholder](#).

### Content Selectors

Content Selectors allow you to define the content you want a particular type of visitor to see. The type of visitor is defined by the [User Segment](#) parameters. For more information, see [Modify a Content Selector](#).

### User Segments

User Segments dynamically group users based on characteristics, such as group membership, browser type, profile values, and other user properties.

### Visitor Tools

As a business user, you can personalize and change content that appears on a site. To do this, the user uses the Visitor Tools. For more information, see [Using the Visitor Tools](#).

### Related Topics:

- [How Do I Add Content?](#)
- [Overview of Interaction Management](#)

## Modify a Placeholder

Placeholders allow you to target content to a desired user, also called a visitor. You use the tools provided in the WebLogic Administration Portal to modify a Placeholder by editing the queries that determine the content displayed in a Placeholder on a JSP page.

To modify a Placeholder:

1. In the Placeholders Resource tree, select the Placeholder and the content search item you want to modify.
2. In the Editor pane, under the Properties tab, change the descriptor by clicking on the bracketed text in the characteristics pane.
3. In the pop-up window, enter the new value for the descriptor and click OK. This descriptor governs what content is selected for display in the Placeholder. The value is based on a property set definition, typically a user profile property set.

**Note:** To quit the modification of the descriptor, click Cancel.

4. To preview the modified content search for the Placeholder, click Show Previews. To hide it, click Hide Previews.

The content search for the Placeholder has been modified.

Related Topics:

- [Assign Interaction Management Resources to a Delegated Administration Role](#)
- [Remove Interaction Management Resources from a Delegated Administration Role](#)

## Assign Delegated Administration of Interaction Management Resources

Delegated Administration roles are dynamic classifications of users that determine user access to resources in the WebLogic Administration Portal. These roles are used to determine whether to grant or deny access to resources, and to determine which capabilities on those resources are available to the administrator.

As an administrator, you can delegate the administration of Interaction Management resources.

**Note:** Before you can assign Interaction Management resources to a Delegated Administration role, you must make sure the role exists and has Delegated Administration rights assigned to it. If no role exists, you must [create](#) it, then you can add users and Interaction Management resources to it. For detailed information about setting up administrators, see [How Do I Set Up a New Administrator?](#)

To assign Interaction Management resources to a Delegated Administration role:

1. In the appropriate Interaction Management Resource tree, select the Interaction Management resource you want to assign to a role. Resource trees include Campaigns, Content Selectors, Placeholders, and User Segments.
2. Select the Edit Delegated Admin tab in the Editor pane to the the right, if it is not already open.
3. Use the drop-down menu in the Editor pane to select a role. (The role appears in the Can Manage box.)
4. If you want to assign the Interaction Management resource to more than one role, repeat Step 3 until all of the roles are listed in the Can Manage box.
5. Check the Can Manage box next to each role.
6. Click Update.
7. To confirm the role has been assigned, select the resource in the Resource tree, then view the Edit Delegated Admin tab in the Editor pane. The role name should appear with the Can Manage box selected.

### Related Topics:

- [Overview of Role Hierarchy](#)
- [Overview of Delegated Administration](#)

## Remove Delegated Administration of Interaction Management Resources

As an administrator, you can rescind the rights of a Delegated Administration role to manage Interaction Management resources.

To remove Interaction Management resources from a Delegated Administration role:

1. In the Resource tree, select the Interaction Management resources you want to remove from a role.
2. Select the Delegated Administration tab in the Editor pane to the right, if it is not already open.
3. Use the drop-down menu in the Edit Delegated Admin tab to select a role. (The role appears in the Can Manage box.)
4. If you want to remove the Interaction Management resource from more than one role, repeat Step 3 until all of the roles are listed in the Can Manage box.
5. Check the box to the left of each role.
6. Click Remove.

### Related Topics:

- [Overview of Role Hierarchy](#)
- [Overview of Delegated Administration](#)

## Modify a Content Selector

Content selectors allow you to define the content you want a particular type of visitor to see. By modifying the Content Selector, you can change the content that is displayed.

To modify a Content Selector:

1. In the Content Selectors Resource tree, select the Content Selector you want to modify.
2. Depending on how the Content Selector has been defined in WebLogic Workshop, you can specify:
  - Whether any or all conditions apply
  - If the visitor belongs to specific User Segments
  - If the visitor has certain characteristics
  - The visitor's HTTP session
  - The visitor's HTTP request
  - The current date
  - The current date is after a particular date
  - The current date and time is after a particular date and time
  - The current time is between two particular times
  - The current date is between two particular dates
  - The current date and time is between two particular dates and times
  - The result of the content search
  - To modify any of these conditions, click the bracketed text within each field.
3. To modify the query user name, click the Update button in this field. If users have Content Selectors with dynamic content rules, they will not see any content until updated the User Query field. This field is also used when a Content Selector targets more than one User Segment and does not know what content to return until the system is supplied with a specific username.
4. To view previews of your selections, click Previews. To hide the previews, click Hide Previews.

**Note:** To cancel modifying the Content Selector, click Cancel.

Related Topics:

- [Assign Interaction Management Resources to a Delegated Administration Role](#)
- [Remove Interaction Management Resources from a Delegated Administration Role](#)

## Modify a User Segment

As an administrator, you can modify a User Segment to change the conditions that apply or to change the User Segment definition.

To modify a User Segment:

1. In the User Segments Resource tree, select the User Segment you want to modify.
2. In the Editor pane, under the Properties tab, you can modify a property by clicking on the blue text with square brackets.
3. In the Content Selectors Resource tree, select the Content Selector you want to modify.
4. Depending on how the Content Selector has been defined in WebLogic Workshop, you can specify:
  - Whether any or all conditions apply
  - If the visitor belongs to specific User Segments
  - If the visitor has certain characteristics
  - The visitor's HTTP session
  - The visitor's HTTP request
  - The current date
  - The current date is after a particular date
  - The current date and time is after a particular date and time
  - The current time is between two particular times
  - The current date is between two particular dates
  - The current date and time is between two particular dates and times
  - The result of the content search
  - To modify any of these conditions, click the bracketed text within each field.
5. In the pop-up window, click Save Changes.

**Note:** To cancel modifying the Content Selector, click Cancel.

Related Topics:

- [Duplicate a User Segment](#)
- [Assign Interaction Management Resources to a Delegated Administration Role](#)
- [Remove Interaction Management Resources from a Delegated Administration Role](#)

## Duplicate a User Segment

As an administrator, you can duplicate a User Segment then save it as a new User Segment with new properties.

To duplicate a User Segment:

1. In the User Segments Resource tree, select the User Segment you want to copy.
2. In the Editor pane, under the Properties tab, click Duplicate.
3. In the pop-up window, enter the name for the new User Segment. Click OK.

The new User Segment now appears in the User Segments Resource tree. You can now [modify the User Segment properties](#).

Related Topics:

- [Modify a User Segment](#)
- [Assign Interaction Management Resources to a Delegated Administration Role](#)
- [Remove Interaction Management Resources from a Delegated Administration Role](#)

## How Do I Change the Appearance of a Portal?

When you change the appearance of a portal, you change the way a particular desktop or view of the portal looks and behaves. A Portal can have many desktops, providing the flexibility to define different appearances and behaviors for each desktop to meet the needs of the desktop's targeted users.

Once you have established the way you want your portal and desktops to appear to users, you sp] also can use entitlements and delegated administration to ease the production and management of desktops. Use entitlements to enforce business access policies that restrict portal resources to specific users, and use Delegated Administration Rights to determine which administrators or business users can define and modify desktops as needed. You have several ways to change the way your desktop looks:

- [Look and Feels](#)
- [Themes](#)
- [Layouts](#)
- [Shells](#)

### Look and Feels

A Look and Feel is a selectable combination of skins and skeletons that determine the physical appearance of a portal desktop. Skins provide the overall colors, graphics, and styles used by all components in a desktop interface. Skeletons are used, in conjunction with skins, to render a portal.

You might change the Look and Feel of a desktop if you wanted to establish a consistent appearance and behavior for your whole desktop. You can then further customize its appearance by altering [themes](#) of individual portal elements.

For detailed information about Look and Feels, see:

- [Overview of Look and Feels](#)
- [Assign a Look and Feel to a Desktop](#)

### Themes

Themes are similar to Look and Feels, but they are applied to a section of a portal, such as a book, page, or portlet instead of a whole desktop. A theme may be used to override the Look and Feel for a specific portal element, providing an additional layer of customization for your portal.



For detailed information about Themes, see:

- [Overview of Themes](#)
- [Assign a Theme to a Portal Element](#)

## Layouts

Layouts control the position of the components (portlets and books) on a page. Using Layouts, you can reposition these components to change the way your portal looks.

**For detailed information about Layouts, see:**

- [Overview of Layouts](#)
- [Rearrange the Pages in a Book](#)
- [Rearrange the Portlets on a Page](#)

## Shells

A Shell is the top-level container for a portal desktop. It usually contains a header, footer, and body. You can change the appearance of your desktop by changing the shell at the top level. For example, external visitors to your site may have a standard shell while internal users may have a shell with an additional section for non-public navigation controls.

**For detailed information about Shells, see:**

- [Overview of Shells](#)
- [Change the Shell of a Desktop](#)
- [Manage Shell Properties](#)

## Related Topics:

- [How Do I Entitle Users to See Specific Parts of My Portal?](#)
- [How Do I Set Up a New Administrator?](#)
- [How Do I Add Content to My Portal?](#)
- [Overview of Library Administration](#)
- [Overview of Portal Administration](#)
- [Overview of Portal Resources](#)

## Overview of Look and Feels

A Look and Feel is a selectable combination of skins and skeletons that determine the physical appearance of a portal desktop. A look and feel XML file (.laf) contains references to the skins and skeletons to use for the look and feel.

Skins provide the overall colors, graphics, and styles used by all components in a desktop interface. Skins are collections of graphics and cascading style sheets (CSS) that allow changes to be made to the look and feel of a portal without modifying the portal components directly. References to images and styles are made in the skin rather than being hard coded into the portal definition. The look and feel file provides a path to the skin directory to be used. A skin is made available to administrators in the administration portal.

Skeletons are used, in conjunction with skins, to render a portal. They are the JSP files used to render individual portal components, such as desktops, books, pages, headers, footers, and portlets. Skeletons allow the developer to customize the display and behavior of the portal components without modification of the underlying portal framework. The skeleton acts as the underlying structure for the portal, with the skin providing the surface details. A skeleton is combined with a skin to create a look and feel.

A look and feel is a portal resource that is available to you in the Portal Management tools for you to apply to a portal or desktop. Developers assemble skeletons, skins, and other elements to create a single look and feel that you can select and apply to your portal.

### Related Topics:

- [Assign a Look and Feel to a Desktop](#)
- [Overview of Desktops](#)
- [Overview of Books](#)
- [Overview of Pages](#)
- [Overview of Portlets](#)

## Assign a Look and Feel to a Desktop

Look and feels are portal resources that handle the way a [desktop](#) view of a portal renders to users. As an administrator, you can assign look and feels to your desktops in the Portal Management tools.

To assign a look and feel to a desktop:

1. In the Portal Resource tree, select a desktop.
2. Select the Desktop Properties tab in the Editor pane if it is not already selected.
3. In the Look and Feel pull-down menu, select the look and feel you want for your desktop.
4. Click Save Changes.
5. To verify your changes in a browser, right click on the desktop in the Portal Resource tree, and click View Desktop.

## Related Topics

- [Overview of Look and Feels](#)
- [Overview of Desktops](#)
- [How Do I Change the Appearance of a Portal?](#)

## Overview of Themes

Themes are similar to Look and Feels, but the scope of a theme is limited to a section of a portal, such as a book, page, or portlet. A theme can be used to change the look and feel of the components of a portal without affecting the portal itself. For example, a desktop can use an overall look and feel and a particular portlet may use a theme to provide a different appearance.

You can use a Theme to call attention to a particular component in a portal application such as a portlet that contains important information such as notification of an even or a promotion for a product. You can also use a Theme for each of the main pages in a site, with color-coding and graphics to provide visual cues. For detailed instructions on using themes, see [Assign a Theme to a Portlet Element](#).

### Related Topics:

- [Overview of Books](#)
- [Overview of Pages](#)
- [Overview of Portlets](#)

## Assign a Theme to a Portal Element

Themes allow you to customize specific portal elements as books, pages, or portlets. As an administrator, you can select pre-existing themes and assign them to elements. There is no limit to the number of times a theme can be used.

To assign a theme to a portal element:

1. In the Portal Resource tree, select a book, page, or portlet whose theme you want to change.
2. Select the <portal element> Properties tab in the Editor pane if it is not already selected. For example: Book Properties.
3. In the Theme pull-down menu, select a theme.
4. Click Save Properties.

### Related Topics

- [Overview of Themes](#)
- [Modify Portlet Properties](#)
- [class="text\\_normal\\_12px">How Do I Change the Appearance of a Portal?](#)

## Overview of Layouts

Layouts are used to control the position of the components in your portal. Each of the components is held in place by a Placeholder. You can customize the way your portal looks by changing the way the pages appear in a book, and changing the way the portlets look on a page. You have two ways you can modify layouts:

- [Position the Pages in Your Book](#)
- [Position Portlets on a Page](#)

A layout does not contain any business logic, nor does it act as a navigational structure. It is simply an organizational construct that is used to support the pages in a portal.

### Related Topics:

- [Modify a Placeholder](#)
- [How Do I Change the Appearance of a Portal?](#)

## Position the Pages in Your Book

You can change the way pages appear in a book by moving them up and down within the book. For example, in a book that contains Page1, Page2, Page3, if you move Page3 up, your pages as represented by tabs will now appear as Page1, Page3, Page2.

To change the layout of a book:

1. In the Portal Resource tree, select a book.

**Note:** If you don't see the right book in the Portal Resource tree, make sure you have selected the right Web Application. To change to a different Web application, select a new one in the Portal Web Application pull-down menu above the Portal Resource tree.

2. Select the Manage Book Contents tab in the Editor pane if not already selected.
3. In the Navigable Name field, click the Move Up and Move Down buttons to change the order of your pages in the tabbed structure.
4. To verify your changes, select the Desktop associated with the book, and right click View Desktop.

### Related Topics:

- [Position the Portlets on Your Page](#)
- [Set Entitlements on Portal Resources](#)
- [Assign Delegated Administration to Portal Resources](#)
- [How Do I Change the Appearance of a Portal?](#)

## Position Portlets on a Page

The page's layout is the grid structure of a page that is used to house Placeholders for portlets on the page. You can select a layout for your portlets and drag and drop portlets between the cells to customize the layout of each page.

To rearrange the portlets on a page:

1. In the Portal Resource tree, select a page.
2. Select the Position Page Contents tab in the Editor pane if not already selected.
3. In the Layout pull-down menu, select a new layout.
4. Drag portlets between columns to re-establish their place on the page.

**Note:** The Lock Placeholder checkbox allows you to lock the contents of a Placeholder so that portlets and books contained within the Placeholder cannot be moved or removed by visitors to the site.

5. Click Save Changes.
6. To verify your changes, select the Desktop associated with the page, and right click View Desktop.

### Related Topics:

- [Position the Pages in a Book](#)
- [Add Portlets to a Page](#)
- [Set Entitlements on Portal Resources](#)
- [Assign Delegated Administration to Portal Resources](#)
- [How Do I Change the Appearance of a Portal?](#)



## Overview of Shells

A Shell is the top-level container for a portal desktop that provides the sections that comprise the portal, typically a header, footer, and body. You can specify a shell independently of the look and feel or main book.

Portal administrators can manage shells in the following ways:

- [Assign a New Shell to a Desktop](#)
- [Manage Shell Properties](#)

Related Topics:

- [Overview of Desktops](#)
- [Overview of Books](#)
- [How Do I Change the Appearance of a Portal?](#)

## Assign a New Shell to a Desktop

Shells include a header and a footer with optional components, such as a navigation column on the left or right side. When a portal is accessed by a user, each of the components in the shell are rendered to form the frame that contains the books, pages, and portlets.

To assign a new shell to a desktop:

1. In the Portal Resource tree, select a desktop.
2. Select the Desktop Properties tab in the Editor pane if it is not already selected.
3. In the Shell pull-down menu, select the shell you want for your desktop.
4. Click Save.

### Related Topics:

- [Overview of Shells](#)
- [Overview of Desktops](#)
- [Modify Shell Properties](#)
- [How Do I Change the Appearance of my Portal?](#)

## Modify Shell Properties

A shell's properties are all of the features and elements that make up the shell. As a portal administrator, you can modify some of these properties in the Shell Properties editor.

To modify shell properties:

1. In the Portal Resource tree, select Library -> Shell.
2. Select a specific shell from the list in the tree.
3. Select the Shell Properties tab in the Editor pane if not already selected.
4. Update the information in the fields:

Field Name	Description
Title	Enter the name you want to give the shell.
Description	Provide a description of the shell.
For the Locale Drop-Down Menu	Select a default language for the shell.

Related Topics:

- [Assign a New Shell to a Desktop](#)
- [Set Entitlements on Portal Resources](#)
- [Assign Delegated Administration to Portal Resources](#)

## How Do I Entitle Users to See Specific Parts of My Portal?

[Visitor Entitlements](#) allow you to restrict user access to different views and elements of your portal. This access is based on the role that you create in the WebLogic Administration Portal. You can entitle user access to these portal resources:

- Desktops
- Books
- Pages
- Portlets
- Look and Feels

### **To entitle users to specific portal resources:**

1. Make sure the user you want to set up has a user profile in the system. For information about creating users and managing user profiles, see [Create a New User](#). To see if your user is already in the system you can [search](#) the LDAP system.
2. [Create a Visitor Entitlement role](#) if the one you want does not exist.
3. [Add users to the visitor role.](#)
4. [Entitle portal resources to your role.](#)

### **Related Topics:**

- [How Do I Set Up a New Administrator?](#)
- [Overview of Visitor Entitlements](#)
- [Overview of Users and Groups](#)
- [Overview of Portal Management](#)

## How Do I Set Up a New Administrator?

You set up administrators in the WebLogic Administration Portal by assigning users to Delegated Administration Roles. A Delegated Administration Role is a dynamic classification of users that is determined by the user's characteristics (or expressions), such as user profile values or time.

When you assign a user to an administrative role, you add your new administrator to a hierarchy of administrative roles and grant the administrator the right to delegate to other administrators.

### To set up a new administrator:

1. Make sure the administrator you want to set up has a user profile in the system. For information about creating users and managing user profiles, see [Create a New User](#). To see if your user is already in the system you can [search](#) the LDAP system.
2. [Create a Delegated Administration Role](#) if the one you want does not exist.
3. [Assign your user](#) (or group of users) to the role.
4. [Grant](#) your new administrator delegated rights.

### Related Topics:

- [How Do I Entitle Users to See Specific Parts of My Portal?](#)
- [How Do I Change an Administrator Password?](#)
- [Overview of Users and Groups](#)
- [Overview of Delegated Administration](#)
- [Overview of Delegated Administration Role Hierarchy](#)

## Overview of Library Administration

Portal Library Administrators create portal applications and portal components and make them available to portal administrators and end users in the Portal Library. The definitions in the library are used as templates for [portal administrators](#) to create and assemble portals and desktops for end users.

In some cases, changes to a definition in the library can be propagated to deployed [portal resources](#). The portal library is the repository for portal components, including the following:

- Book definitions
- Page definitions
- Portlet definitions
- Portlet categories
- Layout definitions
- Shell definitions
- Skin definitions

As the Library Administrator, you can modify the definitions in the Resource library. These modifications are global in scope and carry with them a higher degree of administration responsibility. When you create new portal instances of portal resources and put the in the Portal Library, they will have the following characteristics:

- Your resource will show up in the Portal Library so that portal administrators can create instances of them to use as templates.
- Your resource can be localized.
- Your resource can be entitled at the enterprise application level. This means that when these resources are entitled, they are entitled for every instance.
- Visitors can add these resources to their personal views of a portal via the Visitor Tools because they can choose them from the Library.
- If an administrator or visitor deletes this resource from a portal, the resource can easily be retrieved from the Library.

### Related Topics:

- [How Do I Entitle Users to See Specific Parts of My Portal?](#)
- [How Do I Add Content to My Portal?](#)
- [How Do I Personalize and Update Content?](#)
- [How Do I Localize My Portal?](#)
- [How Do I Create Multi-Channel Portals?](#)
- [How Do I Set Up a New Administrator?](#)



## Overview of Portal Administration

Portal administrators work with portal resources to assemble portals and [entitle](#) parts of the portal to end users and other administrators. A portal represents a Web site that can be one of many within an Enterprise Application. Each portal can support multiple [desktops](#) using shared components. The administration of the portals, desktops, and components can be delegated to the distinct administrators who have the correct [Delegated Administration](#) privileges.

You can assemble your portal using portal resources that exist in the Portal Library, or in some cases you can create your own resources. If you create portal resources outside of the Portal library, you are creating "one-off" versions that have the following restrictions:

- Your resource will not show up in the Portal Library
- Your resource cannot have entitlements that are scoped to the enterprise applications. You can entitle your resource to your Desktop level.
- Visitors will not be able to add these resources to their personal views of a portal via the Visitor Tools because they will not be available in the Library.
- If you delete this resource, it will be permanently deleted since no version of it exists in the Library.

Portal desktops are the specific views of a portal application that visitors access, while components in the library are used as templates to create and deploy portals and desktops. As a portal administrator, the changes you make to a portal affect only that portal, while changes made by a Library Administrator can impact resources used across all portals that use those components.

### Related Topics:

- [How Do I Entitle Users to See Specific Parts of My Portal?](#)
- [How Do I Add Content to My Portal?](#)
- [How Do I Personalize and Update Content?](#)
- [How Do I Localize My Portal?](#)
- [How Do I Create Multi-Channel Portals?](#)
- [How Do I Set Up a New Administrator?](#)



## Overview of Portal Resources

This table provides descriptions of all of the portal resources/templates that are available to you in the WebLogic Administration Portal Library. These resources are initially created by developers and made available to the administration portal.

[Portal Librarians](#) can use these resources to create additional resources to populate the Portal Library. [Portal administrators](#) can create instances of these resources to assemble customized portals.

Portal Resource	Description
Portal	A portal is a Web application that provides a unified user interface to aggregated content and integrated applications. When you "create a Portal" using the tools in the WebLogic Administration Portal, you are essentially creating a "holder" for Desktops, or customized views of the portal. To the Desktops you add other portal resources such as books, portlets, and look and feels. You can then entitle these desktops and resources for specific users.
Desktop	<p>Desktops are the application views of a portal that are accessed by visitors to a site. A desktop is contained within a portal, and there may be multiple desktops within each portal.</p> <p>A desktop contains all the portlets, content, and look and feel elements necessary to create individual user views of a portal. All users access the default before they define their own desktops.</p>
Books	A book is a collection of pages. In a portal the book is often represented as a tabbed set of pages in which only one page is visible at a time. Selecting a different tab in the set causes the corresponding page to be displayed.

Pages	<p>A Page is the primary holder of individual portal elements such as portlets. Pages are added to Books. The pages contained within a book can themselves contain portlets and books, with the latter allowing for an infinite level of nesting. This provides a hierarchical organization that is very flexible, although there is a practical limit to the nesting based on the available screen real-estate and taste.</p>
Portlets	<p>Portlets are the visible components that act as the interface to applications. They are similar to the windows found in most GUIs in their basic look, but they are contained within a portal page and therefore restricted in terms of layout and behavior.</p>
Portlet Categories	<p>Portlet categories are named groupings of portlets created by administrators. Portlet categories cannot be entitled as a unit.</p>
Layouts	<p>A layout determines the arrangement of portlets and book within a matrix, with one layout for each page. Each cell of this matrix contains a Placeholder, which may in turn contain one or more portlets or books arranged vertically or horizontally.</p>
Look and Feels	<p>Look and Feels are collections of skins and skeletons used to determine the way that a portal is rendered and the way that it behaves. The look and feel of a portal is independent of the organizational and navigational structure of a portal.</p>
Shells	<p>The top-level container for a portal desktop that provides the sections that comprise the portal, typically a header, footer, and body. A shell may be specified independently of the look and feel or main book.</p>

## Overview of Desktops

A desktop is a view of the portal that the visitor accesses. There can be one or more desktops per portal, so the portal is effectively a container for the desktops.

A desktop contains all the portlets, content, and look and feel elements necessary to create individual user views of a portal. All users access the default before they define their own desktops.

The hierarchy is as follows:

- Enterprise Application
  - Portal Web Application
    - Portal
      - Desktop
        - [Book](#)
          - [Page](#)
            - [Portlet](#)

You can [create](#) one or more desktops per portal, and tailor each desktop for a target audience.

Related Topics:

- [Modify Desktop Properties](#)
- [Create a Page](#)
- [Create a Book](#)

## Overview of Books

A book is a collection of pages. In a portal, the book is often represented as a tabbed set of pages in which only one page is visible at a time. Selecting a different tab in the set causes the corresponding page to be displayed.

Books are navigational structures in that they allow a portal visitor to move from page to page (within the book) in much the same way they might move from URL to URL in a Web browser. The [pages](#) contained within a book can themselves contain [portlets](#) and books, with the latter allowing for an infinite level of nesting. This provides a flexible hierarchical organization.

With the Portal Management tools, you can:

- [Create books](#)
- [Add pages books](#)
- [Add books to a desktop](#)
- [Add books to books](#)

Related Topics:

- [How Do I Change the Appearance of a Portal?](#)
- [How Do I Localize My Portal?](#)
- [How Do I Create Different Views of My Portal for Different Users?](#)

## Overview of Pages

A page is a container for two types of components, portlets and books. Pages act as organizational constructs that control the placement of the components via layouts. There is no business logic associated with a page, making pages more of a definition than a first-class object. Similarly, pages are not navigational constructs, as they do not provide a mechanism for movement.

Pages are contained within books and pages can contain books, with nesting limited only by the practical limits of the system and good taste. This is illustrated by the following:

- Desktop
  - Book (default)
    - Page 1
      - Portlet A
      - Portlet B
    - Page 2
      - Portlet C
      - Book D
        - Page X
          - Portlet M
          - Portlet N
        - Page Y
          - Portlet O
          - Portlet P

### Related Topics:

- [Add Pages to a Book](#)
- [Create a Page](#)
- [Manage Pages](#)
- [Assign Portal Resources to a Delegated Administration Role](#)

## Overview of Portlets

Portlets are the visible components that act as the interface to applications and content. They are the actual components a user interacts with in a portal. Portlets can be arranged in [pages](#) to provide users access to multiple applications within a single page.

Portlets also support application-to-application communication and can be used to provide users access to composite applications - a single portlet interface that combines data and tasks from multiple sources.

### Related Topics:

- [Overview of Pages](#)
- [Overview of Books](#)
- [Overview of Desktops](#)

## Modify Portlet Properties

Portlet properties are all of the features and elements that make up the portlet. As a portal administrator, you can modify some of these properties in the Portlet Properties editor.

To modify portlet properties:

1. In the Portal Resource tree, select a portlet.
2. Select the Portlet Properties tab in the Editor pane if not already selected.
3. Update the information in the fields. Use the table below for guidance.

For this Field:	Enter This Information:
For the Locale	Select a default language for your portlet from the drop-down menu.
Title	A new title for the portlet.
Description	A new description of your portlet.
Theme	Add a new <a href="#">theme</a> to your portlet.

4. Click Save to save your new theme.

### Related Topics:

- [Edit Portlet Preferences](#)
- [Manage Portlets in a Portlet Category](#)
- [Modify Page Properties](#)
- [Set Entitlements on Portal Resources](#)
- [Assign Delegated Administration to Portal Resources](#)

## Set Visitor Entitlements on Portal Resources

Visitor Entitlements govern visitor access to portal resources based upon a visitor's role or roles. Visitor Entitlement roles can be defined by user, group, and/or a rich set of other predicates, including date/time, user profile, and session and request properties.

Entitlements set on the portal resource listed in the Portal Library supercede those set on the resource type. If you create a portal resource that is not listed in the library, set on the "instance" in the desktop supercede those set in the library.

Before you can assign Visitor Entitlements on portal resources, you must make sure the entitlement role exists and has rights assigned to it. If no role exists, you must [create](#) it, then you can add users and portal resources to it. For detailed information about setting up administrators, see [How Do I Entitle Users to See Specific Parts of My Portal?](#)

You can set Visitor Entitlements on the following portal resources:

- Portlets
- Pages
- Look and Feels
- Desktops
- Books

### **To set Visitor Entitlements on portal resources:**

1. In the Portal Resource tree, select the portal resource for which you want to set Visitor Entitlements.
2. Click the Entitlements tab in the Editor pane.
3. From the pull-down menu, choose a role, and click Add Role.
4. Click the View box in the Capabilities pane, and click Save.

### **Related Topics:**

- [Remove Visitor Entitlements from Portal Resources](#)
- [Overview of Visitor Entitlements](#)
- [Overview Of Delegated Administration](#)



## Assign Delegated Administration to Portal Resources

Delegated Administration roles are dynamic classifications used to qualify users to have the correct access rights to specific tasks and resources. These roles are used to determine whether to grant or deny access to resources, and to determine which capabilities on those resources are available to the administrator.

You can assign individual portal resources to predefined Delegated Administration roles and then assign specific users and groups to roles in order to grant them administrative capabilities for the desired portal resources.

Before you can assign portal resources to a Delegated Administration role, you must make sure the role exists and has Delegated Administration rights assigned to it. If no role exists, you must [create](#) it, then you can add users and portal resources to it. For detailed information about setting up administrators, see [How Do I Set Up a New Administrator?](#)

To assign portal resources to a Delegated Administration role:

1. In the Portal Resource tree, select the portal resource you want to assign to a role.
2. Select the Edit Delegated Administration tab in the Editor pane to the the right, if it is not already open.
3. Use the drop-down menu in the Delegated Administration editor to select a role. (The role appears in the Can Manage box.)
4. If you want to assign the portal resource to more than one role, repeat Step 6 until all of the roles are listed in the Can Manage box.
5. Check the Can Manage box next to each role.
6. Click Update.
7. To confirm the role has been assigned, select the resource in the Resource tree, then view the Delegated Administration Editor pane. The role name should appear with the Can Manage box selected.

### Related Topics:

- [Overview of Visitor Entitlements](#)
- [Overview of Portal Administration](#)
- [Remove a Portal Resource from a Role](#)
- [Overview of Role Hierarchy](#)
- [Overview of Delegated Administration](#)

## Add a Portlet to a Page

When you add a portlet to a [page](#), you provide access to the application or content contained within the portlet to a portal user.

To add a portlet to a page:

1. In the Portal Resource tree, select the page to which you want to add a portlet.
2. In the Manage Page Contents editor in the Editor pane, click Add to Page next to each portlet you want to add. The portlets will appear in the Portlets in Page list to the right of the editor.
3. Click the Position Page Contents tab.
4. Drag and drop the portlets to the desired location on the page (Placeholders).
5. Click Save Changes.
6. To verify your changes, select the Desktop associated with the page, and right click View Desktop.

Related Topics:

- [Overview of Pages](#)
- [Overview of Portlets](#)
- [Position the Portlets on a Page](#)
- [Modify Page Properties](#)
- [Add a Page to a Book](#)
- [Add a Book to Another Book](#)

## Create a New User

A user can be an administrator in the system or a visitor to a portal. Adding someone as a user gives them a username and a password (or other credential), and enables them to be selected for inclusion in other role-based user groups associated with portals.

When you create a user, you are creating a record of an individual. After this file has been created, it is stored in the WebLogic Server LDAP system by default. This makes it easy for you to access it to change its properties, change its group, and give it permissions as an administrator (via [Delegated Administration](#)) or as a visitor to your finished portal (via [Entitlements](#)).

Administrators can configure new users in the WebLogic Server Console and store them in an active directory. For detailed information, see the [http://e-docs.bea.com/wls/docs81/ConsoleHelp/security\\_activedirectoryauthenticator\\_config\\_active-directory.html](http://e-docs.bea.com/wls/docs81/ConsoleHelp/security_activedirectoryauthenticator_config_active-directory.html).

To create a new user:

1. In the All Groups Resource tree, select a group.
2. Select the Add Users tab.
3. Click Create New User.
4. Enter the name of the new user and a password for the new user in the pop-up window.
5. Click Create New User.

Related Topics:

- [Add a User to a Group](#)
- [Create a Group](#)
- [Add User to a Delegated Administration Role](#)
- [How Do I Entitle Users to See Specific Parts of My Portal?](#)

## Find Users

The WebLogic Administration Portal provides a way for you to find users that are not already members of a selected group. If you need to perform administrative tasks, such as editing user profiles, removing users from a group, or deleting users from the system, you must first locate those users in the system.

### To find a single user:

1. In the Users and Groups Resource tree, select a group.
2. Click the Edit Users tab, if it's not already selected.
3. Type the user's name in the Login ID field, and click Search.
4. Click the check box next to each user in the Select box to select it, and click Select Users. Selected users now appear in the Edit box.

### To find multiple users:

1. In the Users and Groups Resource tree, select a group.
2. Click the Edit Users tab, if it's not already selected.
3. Select a letter in the Quick Search field. Selected users appear in the Select box.
4. Click the check box next to each user in the Select box to select it, and click Select Users. Selected users now appear in the Edit box.

### To find all users in a group:

1. In the Users and Groups Resource tree, select a group.
2. Click the Edit Users tab, if it's not already selected.
3. In the Quick Search box, click Select All Users in a Group.

You are now ready to perform one of the following tasks:

- [Edit user profiles](#)
- [Remove users from a group](#)
- [Add users to a group](#)
- [List user's group membership](#)

### Related Topics:

- [Overview of Delegated Administration](#)
- [Overview of Visitor Entitlements](#)

## Create a Visitor Role

As an administrator, you can create a new visitor role.

To create a Visitor Role:

1. In the Visitor Entitlements pane, select the desired web application from the pull-down menu.
2. Select Visitor Roles in the Resource tree.
3. In the Visitor Roles Editor pane, click Create Role.
4. In the User Prompt Window, enter the name of the new role, and click Create.

The new Visitor Role appears in the Resource tree.

Related Topics:

- [Add Users to a Visitor Role](#)
- [Add Groups to a Visitor Role](#)
- [Assign a Visitor Entitlement Role to a Delegated Administration Role](#)
- [Remove a Visitor Entitlement Role from a Delegated Administration Role](#)
- [Delete a Visitor Role](#)
- [Edit Visitor Role Expressions](#)
- [Modify Visitor Role Properties](#)
- [Rename a Visitor Role](#)

## Add Users to a Visitor Role

As an administrator, you can add users to a visitor role.

To add users to a Visitor Role:

1. In the Visitor Roles Resource tree, select the Visitor Role to which you want to add users.
2. Click the Add Users to Role tab in the Editor pane.
3. You can search for a user by:
  - Entering the Login ID or an expression and click Search.
  - Browsing all users by clicking Show All Users.
  - Clicking on the first letter of their name.

The results display in the bottom of the Editor pane.

4. In the Showing Found Users box, click the name of the user you want to add to the Visitor Role and click on Select Users.
5. Check the box to the left of the user's name, and click Add Users to Role.
6. The user is then added to the designated visitor role and can be verified by clicking the Role Properties tab for a list of users assigned to that role.

Related Topics:

- [Add Groups to a Visitor Role](#)
- [Create a Visitor Role](#)
- [Assign Delegated Administration Rights to a Visitor Role](#)
- [Remove Delegated Administration Rights from a Visitor Role](#)
- [Delete a Visitor Role](#)
- [Edit Visitor Role Expressions](#)
- [Modify Visitor Role Properties](#)
- [Rename a Visitor Role](#)

## Overview of Portal Management

The WebLogic Administration Portal supports the creation and management of portal applications, portals, and portal components. Whether you are a portal administrator with far-reaching administrative responsibility managing multiple portal applications, or you are simply working with specific portal building blocks such as portlets, Campaigns, or content you have flexibility for assembling and maintaining portals and portal resources.

### What Do I Create When I Create a Portal?

From an administrative standpoint, a portal is a container that defines a portal application. When you create a new portal in the administration portal, you are really creating an empty portal to hold different versions of the portal (Desktops) that can be targeted to specific users. A portal can contain one or more Desktops, or views, of a portal. It is to the Desktops that you will add the portal resources and navigation such as books, pages, and portlets that make a dynamic portal.

Each portal is associated with a Web Application that contains all of the resources required to run portals on the Web.

- WebApplication
  - Portal (Portal Application)
    - Desktop 1
      - Book 1
        - Page 1
        - Page 2
          - Portlet 1
          - Portlet 2
    - Desktop 2
      - Book 2
        - Page 3
        - Page 4
          - Portlet 1
          - Portlet 3
          - Portlet 4
      - Book 3
        - Page 5
        - Page 6
          - Portlet 2
          - Portlet 4

## Portal Administrators

Two types of administrators use the Portal Management tools:

- [Portal Library Administrator](#)
- [Portal Administrator](#)

The Portal Management tools allow you to create and maintain WebLogic Portal applications and resources. For Library Administrators, the Portal Resource tree provides you with a list of all of the resources that are available for administration and allows you to modify their properties.

For portal administrators, the library might not be visible because you do not have privileges for library resources. Instead, your Portal Resource tree contains the portals and portal resources for which you have administration authority.

Related Topics:

- [Overview of Users and Groups](#)
- [Overview of Delegated Administration](#)
- [Overview of Interaction Management](#)
- [Overview of Content Management](#)



## Create a New Delegated Administration Role

Delegated Administration roles allow you to determine portal resources that an administrator may access and what administrators may do to those resources. You create administrative roles so that the access rights and capabilities in the administration portal map correctly to the users who need varying degrees of access.

The WebLogic Administration Portal comes with predefined administrators, but you can create an unlimited number of additional administrative roles to which you can map an unlimited number and variety of users. Role creation can take place at any time: You can create the roles before the portals are assembled, while assembling a portal in an interactive design fashion, or after the portal has been assembled.

To create a new Delegated Administration role:

1. In the Delegated Administration Resource tree, select the parent role for which you want to create a new child role
2. Right click, and select Add New Role (or click the Add New Role icon in the top right toolbar).
3. Enter the name of the new role in the pop-up window, and click OK.
4. Now you are ready to [add users](#) and expression your new role.

### Related Topics:

- [Add Groups to a Delegated Administration Role](#)
- [Overview of Delegated Administration Role Hierarchy](#)
- [Overview of Delegated Administration](#)

## Add a User to a Delegated Administration Role

When you add a user to a role, you grant that user access to all of the administrative rights attributed to that role. If you want to add a specific user or a set of users that do not already belong to a group to an administration role, use these instructions to select the users one at a time and add them to a role.

To add a user or users to a Delegated Administration role by name:

1. In the Delegated Administration Resource tree, select the role to which you want to add users.
2. Select the Add Users to Role tab.
3. To search for the user:
  - Type the user's name in the Manual Search field and click Search
  - Click a letter in the Quick Search field
  - Click Show All Users to see a list of all available users

**Note:** If the user is not in the system, you can [create a new user](#).

4. Selected users appear in the Select box. Click the check box next to each user to select it, and click Select Users. Selected users now appear in the Add box.
5. Click Add User to Role.
6. Click the Role Properties tab and confirm that the users have been successfully added to the role.

**Note:** When you are establishing your role hierarchy, keep in mind that child roles within a Delegated Administration role must be unique. For example, you cannot have a Delegated Administration role called RoleA with a child role of Role 4 if you already have a child role called Role 4 elsewhere in the hierarchy.

### Related Topics:

- [Add a Group to a Delegated Administration Role](#)
- [Assign Portal Resources to a Delegated Administration Role](#)
- [Create a New User](#)
- [Overview of Delegated Administration](#)

## Grant Delegation Authority to an Existing Role

You can grant the authority to a selected role to manage subroles. For example, you can grant another administrator the authority to create child roles, delete them, move them, and add users to them in the selected role. Each role in the node can be granted the rights to edit its subordinate roles.

**Note:** You can modify those roles that are delegated below you in the hierarchy. You cannot modify the role to which you are logged in or any roles above you in the hierarchy.

To grant delegation authority to an existing role:

1. In the Delegated Administration Resource tree, select a role.
2. Click the Role Properties tab, if it is not already selected.
3. Click the checkbox next to Administrators in this Role can manage and can delegate to child Roles.
4. Click Save.

### Related Topics:

- [Remove Users from a Delegated Administration Role](#)
- [Remove Groups from a Delegated Administration Role](#)
- [How Do I Set Up a New System Administrator?](#)
- [How Do I Entitle Users to See Specific Parts of My Portal?](#)
- [Overview of Delegated Administration Role Hierarchy](#)

## How Do I Change an Administrator Password?

If you have the appropriate Delegated Administration rights, you can change passwords for other administrators as well as for site visitors. A common need for a password update is if, for example, a site user has lost or cannot remember a password and needs you to reset it.

After a password has been set, you cannot find out what it is, but you can reset it. Be aware that if you change someone's password, they will no longer be able to log in the WebLogic Administration Portal, and there is no way to retrieve the user and password name.

### **To change an administrator password:**

1. Select User & Groups from the main menu.
2. Select the Edit Users Tab.
3. [Find](#) the user whose password you want to change.
4. Double-click the user name to access the User Editor pane.
5. Click the Change Login Password tab.
6. Enter the new password in both input fields.
7. Click Save.

### **Related Topics:**

- [How Do I Update User Information?](#)
- [Overview of Users and Groups](#)
- [Overview of Delegated Administration](#)
- [Overview of Delegated Administration Role Hierarchy](#)

## Overview of Delegated Administration Role Hierarchy

Roles are dynamic classifications of users who meet specific requirements, such as membership in a group, matching user profile property values, and time of day. A role is used to determine whether to grant or deny access to resources, and to determine which capabilities on those resources are available to the user. The role hierarchy defines the structure for Delegated Administration.

The root Delegated Administration role is defined in the Portal Resource tree as Administrators. Any user mapped to this predefined role has unlimited administrative access in the administration portal. Only a user with global administrative rights can change the definition of this root Delegated Administration role.

You have flexibility in the way you set up your administration hierarchy and assign rights to your various administrators. You can create different levels of administrators, each with varying degrees of access. You can also create administrators that can, in turn, delegate administration tasks to other users.

WebLogic Portal includes a default system administrator out of the box. The system administrator has unlimited access to administrative tasks anywhere within the enterprise portal application. You can create as many different administrators as you need by creating administrator roles and then assigning specific users, user groups, or user characteristics.

### Parent Roles and Child Roles

Delegated Administration roles allow you to determine portal resources that an administrator can access and what administrators can do to those resources. A child role has a subordinate relationship to another role (parent) and is used to determine who can delegate to whom. That is, subroles are children in the sense that files are children of directories. A user in a role can only delegate to its subroles, providing a way to restrict Delegated Administration.

For example:

- **RoleA** can delegate to :
  - Role1
  - Role2
  - Role3 can delegate to:
    - Role 3.1
    - Role 3.2
- **RoleB** can delegate to:
  - Role4
  - Role5
  - Role6

The user in Role A may not delegate to the subroles of Role B as a "peer" role. Role A may delegate to any of its descendants. Child roles do not inherit the traits of the parent role. If you delete a child role, you are removing it from the system.

**Note:** When you are establishing your role hierarchy, keep in mind that child roles within a Delegated Administration role must be unique. For example, you cannot have a Delegated Administration role called RoleA with a child role of Role 4 if you already have a child role called Role 4 elsewhere in the hierarchy.

#### Related Topics:

- [Overview of Delegated Administration](#)
- [Assign Users and Groups to a Delegated Administration Role](#)
- [Assign Portal Resources to a Delegated Administration Role](#)
- [Assign Interaction Management Resources to a Delegated Administration Role](#)
- [Assign Delegated Administration of Content Management Resources](#)
- [Overview of Portal Resources](#)
- [How Do I Set Up a New System Administrator?](#)
- [How Do I Entitle Users to See Specific Parts of My Portal?](#)

## How Do I Localize a Portal?

The WebLogic Administration Portal provides tools to help you localize individual portal resources so that they render in different languages. When you assign a language to a portal resource, you assign the preferred language to the name of that resource. Resources localized in the Portal Library will be propagated through the portals in which they are used.

If the end user's browser supports the selected language, the portal resource is rendered in that language. If the end user's browser does not support that language, the system works through a list of available languages until it finds one that is supported in both your portal and the end user's browser.

To localize portal resources in the WebLogic Administration Portal:

1. Select Portals under Portal Management in the top Menu in the Editor Pane.
2. Expand the Library in the Portal Resource tree.
3. Select the portal resource you want to localize:
  - [Theme](#)
  - [Book](#)
  - [Page](#)
  - [Layout](#)
  - [Look and Feel](#)
  - [Portlet](#)
4. Select the Properties tab for the resource.
5. Select a local from the For the Locale drop-down menu, and click Save Changes.

### Adding/Deleting a Locale

If you want to make additional locales available in the For the Locale drop-down menu (for example, ja, fr or en), select Add New Local, enter a name, and click OK. To delete a locale, select a locale from the drop-down menu, and click Delete Locale

Note: For information about localization standards, see <http://java.sun.com/j2se/1.3/110n-notes.html>.

### Related Topics:

- [How Do I Change the Appearance of a Portal?](#)
- [How Do I Entitle Users to See Different Parts of My Portal?](#)

- [How Do I Add Content to a Portal?](#)
- [Overview of Portal Resources](#)



## How Do I Create Multi-Channel Portals?

A multi-channel portal contains content that can be viewed on alternative devices, such as Pocket PC, Palm Pilot, or Nokia Communicator. You can set up a multi-channel portal using portlets that support these mobile devices.

Multi-channel portlets contain properties that identify the devices for which they are enabled. In the WebLogic Administration Portal, you can determine which portlets provide support for multiple channels, and then you can include them as you [create a portal](#) or a [desktop](#).

To see an example of a portlet that is enabled for multi-channels:

1. Select Portals under Portal Management in the top Menu in the Editor pane.
2. In the Portal Web Applications drop-down menu, select Tutorial.
3. Expand the Library in the Portal Resource tree, and select All Portlets.
4. Select the Enabled Palm, PocketPC portlet.
5. In the Portlet Properties tab in the Editor pane, look at the Other Portlet Properties box.
6. The Enabled Client Classifications field indicates the multi-channel outlets for which this portlet has been configured.

**Note:** If a portlet has no properties available in the Enabled Client Classifications field, it is not multi-channel enabled.

### Related Topics:

- [Create a Portal](#)
- [Create A Desktop](#)
- [Add Portlets to a Page](#)
- [How Do I Change the Appearance of a Portal?](#)
- [How Do I Localize a Portal?](#)
- [How Do I Add Content to My Portal?](#)
- [How Do I Entitle Users to See Specific Parts of My Portal?](#)

## Modify Book Properties

A book's properties are all of the features and elements that make up the book. As a portal administrator, you can modify some of these properties in the Book Properties editor.

To modify book properties:

1. In the Portal Resources tree, select a book.

**Note:** If you don't see the right book in the Portal Resource tree, make sure you have selected the right Web Application. To change to a different Web application, select a new one in the Portal Web Application pull-down menu above the Portal Resource tree.

2. Select the Book Properties tab, if it is not already selected.
3. Enter a name and description for the book, and select a menu style from the pull-down menu.

**Note:** The Multi-Level menu is a pull-down menu, and the Single-Level menu is a tabbed menu.

4. Use the dropdown menu to select a new [theme](#) for the book.
5. Select the Manage Book Contents tab.
6. In this tab, you can:
  - [Add pages to and remove pages from a book](#)
  - [Add books to and remove books from a book](#)
  - Create [pages](#) and [books](#)
  - [Rearrange pages in a book](#)
7. To verify your changes in a browser, right click on the associated desktop in the Portal Resource tree, and click View Desktop.

Related Topics:

- [Set Entitlements on Portal Resources](#)
- [Set Delegated Administration of Portal Resources](#)
- [Modify Page Properties](#)
- [Modify Desktop Properties](#)

## Add Pages to a Book

A page is the primary holder of individual portal elements such as [portlets](#) and [look and feels](#). The [book](#) provides the structure and navigation for those pages. When you add pages to a book, you are populating your book with content, which in turn is organized and rendered to the portal visitor via the [desktop](#).

To add pages to a book:

1. In the Portal Resource tree, select the book to which you want to add a page.

**Note:** If you don't see the right book in the Portal Resource tree, make sure you have selected the right Web Application. To change to a different Web application, select a new one in the Portal Web Application pull-down menu above the Portal Resource tree.

2. Select the Manage Book Contents tab in the Editor pane.
3. In the Available Pages column of the Editor pane, click Add to Book next to each page you want to add. The page will appear in the Pages in Book list to the right of the editor.

Related Topics:

- [Manage Pages](#)
- [Add a Portlet to Page](#)
- [Add a Book to Another Book](#)
- [Position Pages in a Book](#)

## Add a Book to a Book

Books provide a visual and navigational infrastructure for pages. To facilitate flexibility in the way you render content in your portal, you can place books inside of books so you can further organize pages of information. You can then repeat the process of [adding more pages](#) to this new book.

To add a book to a book:

1. In the Portal Resource tree, navigate to the book to which you want to add a book.

**Note:** If you don't see the right book in the Portal Resource tree, make sure you have selected the right Web Application. To change to a different Web application, select a new one in the Portal Web Application pull-down menu above the Portal Resource tree.

2. Select the Manage Book Contents tab in the Editor pane.
3. In the Available Books column of the Editor Pane, click Add to Book next to each book you want to add. The book will appear in the Books in Book list in the Editor pane.

Related Topics:

- [Create a Book](#)
- [Add Pages to a Book](#)
- [Set the Primary Book on a Desktop](#)
- [class="text\\_normal\\_12px">Add a Book to a Book](#)
- [Modify Book Properties](#)

## Create a New Page

A page is a portal resource that acts as container for portlets. If you have Delegated Administration privileges, you can create a new page in the Portal Library.

To create a page in the Portal Library:

1. In the Portal Resources tree, expand the Portal Library to show all of the resources in the library. To do this, right click Library and select Fully Expand Node from the menu.
2. Right click Pages, and select New Page. (Or select the Manage Page tab, and click the Create New Page Button.)
3. Enter a title and description for the page, and select a layout from the pull-down menu.
4. Click Save.

To create a page in a specific book (not available in the Portal Library):

Within a specific book in a particular portal, you can create a new page. However, it is important to note that the new page will not be made available to the Portal Library.

1. In the Portal Resources tree, expand the Portals node to show all of the available portals and navigate to a book.

**Note:** If you don't see the right book in the Portal Resource tree, make sure you have selected the correct web application. To change to a different web application, select a new one in the Portal Web Application pull-down menu above the Portal Resource tree.

2. Select the Manage Book Contents tab in the Editor pane.
3. In the Available Pages box, click Create New Page. The Portal Resource tree now shows New Blank Page within the specific book.
4. To rename your new page, select the New Blank Page in the Portal Resource tree.
5. Select the Page Properties tab in the Editor pane.
6. Enter a title and description for the page.

**Note:** You can also select a [layout](#) and a [theme](#) from the drop-down menus.

7. To save your changes, click Save Changes.

## Related Topics:

- [Overview of Pages](#)
- [Overview of Books](#)
- [Add Portlets to a Page](#)

- [Position Portlets on a Page](#)
- [Set Entitlements on Portal Resources](#)
- [Assign Delegated Administration to Portal Resources](#)
- [Add a Page to a Book](#)

## Create a New Book

A book is a portal resource that provides structure and navigation in your portal.

If you have Library Administration privileges, you can create a new book in the portal library that can be used as a component in multiple portals. If you have Portal Administrator privileges, you can create books to use in customized portals, but these books will not be reusable resources listed in the Portal Library.

To create a book in the Portal Library:

1. In the Portal Resources tree, expand the Portal Library to show all of the resources in the library.
2. Right click on Books, and select New Book from the pop-up menu. (Or select the Manage Book tab in the Editor pane, and click the Create New Book Button.)
3. Enter an name and description for the book, and select a menu style from the pull-down menu.

**Note:** The Multi Level Menu is a pull-down menu, and the Single Level Menu is a tabbed menu.

4. Click Save.

Create a book for a specific portal (not available in the Portal Library):

Within a specific portal, you can create a new book for that portal. However, it is important to note that the new book will not be made available to the Portal Library.

1. In the Portal Resources tree, expand the Portals node to show all of the available portals and navigate to a book.

**Note:** If you don't see the correct book in the Portal Resource tree, make sure you have selected the correct web application. To change to a different web application, select a new one in the Portal Web Application pull-down menu above the Portal Resource tree.

2. Select the book in which you want to create a book.
3. Select the Manage Book Contents tab in the Editor pane.
4. In the Available Books box, click Create New Book. The Portal Resource tree now shows New Blank Book.
5. To rename your new book, select New Blank Book in the Portal Resource tree.
6. Select the Book Properties tab.
7. Enter a title and description for the book. Click Save Changes.

**Note:** You can also add or change locale information, select a menu style from the drop-down menu and select a [theme](#). The Multi Level Menu is a pull-down menu, and the Single Level Menu is a tabbed menu.

#### Related Topics:

- [Overview of Books](#)
- [Create a Page](#)
- [Create a Desktop](#)
- [Set Entitlements on Portal Resources](#)
- [Assign Delegated Administration to Portal Resources](#)
- [Set the Primary Book on a Desktop](#)
- [Add a Book to a Book](#)
- [How Do I Change the Appearance of a Portal?](#)
- [How Do I Create Multi-Channel Portals?](#)
- [How Do I Create Different Views of My Portal for Different Users?](#)



## Manage Page Contents

The contents of a page are made up of portlets and books. The Manage Page Contents editor shows you which portlets and books are available for you to use and which are already on your page. You can easily add and remove portlets and books to construct your page.

To manage page contents:

1. In the Portal Resource tree, select a page.

**Note:** If you don't see the right page in the Portal Resource tree, make sure you have selected the right Web Application. To change to a different Web application, select a new one in the Portal Web Application pull-down menu above the Portal Resource tree.

2. Select the Manage Page Contents tab in the Editor.
3. To add portlets to the page, click Add to Page next to the appropriate portlet.
4. To remove portlets from the page, click Remove from Page.
5. To add a book to the page, scroll to the bottom of the screen and click Add to Page next to the appropriate book in the list.
6. To verify your changes in a browser, right click on the associated desktop in the Portal Resource tree, and click View Desktop.

Related Topics:

- [Create a New Page](#)
- [Add Portlets to a Page](#)
- [Position Portlets on a Page](#)
- [Set Entitlements on Portal Resources](#)
- [Assign Delegated Administration to Portal Resources](#)

## Modify Desktop Properties

A desktop's properties are all of the features and elements that make up the desktop. As a portal administrator, you can modify some of these properties in the Desktop Properties editor.

To modify desktop properties:

1. In the Portal Resource tree, select a desktop.
2. Select the Portal Properties tab in the Editor pane if not already selected.
3. Update the information in the fields. Use the table below for guidance.

For this Field:	Enter This Information:
For the Locale	Select a default language for your desktop from the drop-down menu.
Title	A new title for the desktop
Description	A new description of your desktop.
Default Shell	Select a new <a href="#">shell</a> in the drop-down menu.
Look and Feel	Select a new <a href="#">look and feel</a> in the drop-down menu.
Primary Book	Select a new <a href="#">book</a> in the drop-down menu.

4. Click Save Changes.
5. To verify your changes in a browser, right click on the desktop in the Portal Resource tree, and click View Desktop.

Related Topics:

- [Set Entitlements on Portal Resources](#)
- [Assign Delegated Administration to Portal Resources](#)
- [Overview of Desktops](#)
- [Overview of Books](#)
- [Overview of Look and Feels](#)

## Modify Layout Properties

A Layout's properties are all of the features and elements that make up the Layout. As a portal administrator, you can modify some of these properties.

To modify Layout properties:

1. In the Portal Resource tree, go to Library -> Layout.
2. Select a them from the Available Layouts list.
3. Update the information in the fields. Use the table below for guidance.

For this Field:	Enter This Information:
For the Locale	Select a default language for your layout from the drop-down menu.
Title	A new title for the layout.
Description	A new description of layout.

5. Click Save Changes.

## Related Topics

- [Overview of Layouts](#)
- [Position Pages in a Book](#)
- [How Do I Localize My Portal?](#)
- [How Do I Change the Appearance of a Portal?](#)

## Modify Look and Feel Properties

A Look and Feels's properties are all of the features and elements that make up the Look and Feel. As a portal administrator, you can modify some of these properties.

To modify Look and Feel properties:

1. In the Portal Resource tree, go to Library -> Look and Feel.
2. Select a them from the Available Look and Feels list.
3. Update the information in the fields. Use the table below for guidance.

For this Field:	Enter This Information:
For the Locale	Select a default language for your look and feel from the drop-down menu.
Title	A new title for the look and feel.
Description	A new description of look and feel.

5. Click Save Changes.

### Related Topics

- [Overview of Look and Feels](#)
- [Assign a Look and Feel to a Desktop](#)
- [Overview of Portal Resources](#)
- [How Do I Localize My Portal?](#)
- [How Do I Change the Appearance of a Portal?](#)

## Edit a Portlet Preference

If you have the appropriate Delegated Administration rights, you can edit a portlet's preferences to change the way a portlet behaves.

To edit a portlet preference:

1. In the Portal Resource tree, expand the Library.
2. Expand All Portlets, and select a portlet from the list.
3. Select the Portlet Preferences tab in the Editor pane if not already selected.
4. Click Edit next to the preference you want to modify.
5. Fill in the information in the fields. Use the table below for guidance.

For this Field:	Enter This Information:
Preference Name	The name you want to give this preference. It will be listed this way.
Preference Description	A meaningful description of this preference.
Preference Value	A value for a preference. For example: True or False.
Is Multi-Valued (checkbox)	Identify this preference as one that will have more than one value. Use the Add New Value field allows you to input additional values for this preference.
Is Modifiable (checkbox)	Allows you to designate whether end users can modify this portlet.
Propagate value(s) to all instances of this Portlet (checkbox)	Allows you to designate this preference to be propagated through every instance of this portal.

6. Click Save Portlet Preference.

### Related Topics:

- [Create a Portlet Preference](#)
- [Modify Portlet Properties](#)
- [Add a Portlet to a Page](#)
- [Create a Portlet Category](#)

## Manage Portlets in a Portlet Category

You can manage the portlets in your portlet categories by adding new portlets and moving them between categories.

To add and move portlets into a category:

1. In the Portal Resource tree, go to Library -> Portlet Categories.
2. Expand Portlet Categories, and select a category.
3. Select the Manage Portlets tab in the Editor pane.
4. Select portlets in the Available Portlets box, and click Add Portlet to move them to the Selected Portlets box.

Note: Use the Remove Portlets button to remove portlets from the Selected Portlets box.

5. Click Submit Changes.

### Related Topics:

- [Position Portlets on a Page](#)
- [Add a Portlet to Page](#)
- [Create a Portlet Category](#)

## Create a New Portal

When you create a new portal, you are creating an empty portal shell to which you can add as many [desktops](#) (versions of the portal) as you need. You can then entitle specific users with access to the Desktops. Each portal is associated with a Web Application that contains all of the resources required to run portals on the web. For more information, see the [Overview of Portal Management](#).

### To create a new portal:

1. In the Portal Management tools, use the drop-down list above the Portal Resource tree to select a portal web application.

**Note:** If you do not know which portal application to choose, consult with the developer who created the portal you are trying to expose.

2. Select Portals in the Portal Resource tree.
3. Click Create New Portal in the Editor Pane.
4. Fill in the portal application properties. Field descriptions appear beneath each configurable field in the Editor pane.
5. Click Save. Look for the new portal and portal resources in the Portal Resource tree.

You can now add [desktops](#) to your portal.

### Related Topics:

- [Create a Desktop](#)
- [Create a Page](#)
- [How Do I Change the Appearance of a Portal?](#)
- [How Do I Add Content to a Portal?](#)
- [How Do I Localize a Portal?](#)
- [How Do I Entitle Users to See Specific Parts of My Portal?](#)

## Create a Desktop

An empty desktop is one that is not derived from an existing portal definition. When you create an empty desktop, you must then populate it with portal resources. A desktop created from a template allows you to make use of existing resources such as books, pages, and portlets.

To create a desktop:

1. In the Portal Resource tree, select the portal in which you want to create the empty desktop.
2. Select the Portal Properties tab in the Editor Pane, if it is not already selected.
3. Click Create New Desktop.
4. Fill in the fields of the table. Use the table below for guidance.

For this Field:	Enter This Information:
Title	Supply a name for your desktop. This title will be visible in the Portal Resource Tree.
Description	Supply a description of your desktop.
Partial URL	Enter the name you want used to access the desktop.
Create New Desktop Using:	<ul style="list-style-type: none"> <li>• <b><u>Portal Template File</u></b>: Use an existing template to create your new desktop. This allows you to make use of existing resources such as books, pages, portlets, and associated layouts and themes.</li> <li>• <b><u>Existing Portal Resources in Library</u></b>: Create an empty Desktop that you can then populate with portal resource from the Portal Library.</li> </ul>

Create a Desktop from a Portal Template:

5. After completing steps 1-4 above, select the radio button next to Portal Template File
6. Select a template from the Choose a Template drop-down menu.

**Note:** If you select the New Blank Desktop, you will create an empty desktop to which you must add pages and other resources. The New Blank Desktop template uses default



values for the shell and look and feel and creates a new blank book as the primary book. Once you have created the desktop from a template, you can customize it by editing the portal resources.

7. Click Create New Desktop.
8. To verify your changes in a browser, right click on the associated desktop in the Portal Resource tree, and click View Desktop.

### Create a Desktop from Existing Portal Resources in the Library:

5. After completing steps 1-4 above, select the radio button next to Existing Portal Resources in Library.
6. Select a [Shell](#) from the Default Shell drop-down menu.
7. Select a [Look and Feel](#) from the Look and Feel drop-down menu.
8. Select a [Book](#) from the Primary Book drop-down menu. If the menu is empty, you may [create books](#) to add to your desktop.
9. Click Create New Desktop.
10. To verify your changes in a browser, right click on the associated desktop in the Portal Resource tree, and click View Desktop.

### Related Topics:

- [Set the Primary Book on a Desktop](#)
- [Add a Page to a Book](#)
- [Add a Book to a Book](#)
- [Overview of Desktops](#)
- [How Do I Create Different Views of My Portal for Different Users?](#)

## Set the Primary Book on a Desktop

The primary book is the main visual and navigational infrastructure for a particular desktop view of a portal. When you add a book to the portal you are actually adding it to a [desktop](#) view of the portal. You can also [add a book to a page](#).

To set the primary book on a desktop:

1. In the Portal Resource tree, navigate to the desktop to which you want to set the primary book.

**Note:** If you don't see the right desktop in the Portal Resource tree, make sure you have selected the right Web Application. To change to a different Web application, select a new one in the Portal Web Application pull-down menu above the Portal Resource tree.

2. In the Desktop Properties tab in the Editor pane, use the Primary Book pull-down menu to select a book.
3. Click Save.

You can now add [pages](#) to your book.

Related Topics:

- [Add a Page to a Book](#)
- [Add a Book to a Book](#)
- [Modify Book Properties](#)
- [Add Portlets to a Page](#)

## How Do I Create Different Views of My Portal for Different Users?

The desktop is the user view of the portal application. There can be one or more desktops per portal, and each desktop can be dynamically assembled based on user preferences and entitlement policies.

A desktop contains all the portlets, content, and look and feel elements necessary to create individual user views of a portal.

To create desktop views of your portal that are available to different users:

1. [Create a desktop](#) within a portal.
2. [Customize the way it looks](#) and its content.
3. Ensure you have the correct [entitlement roles](#) set up.
4. [Entitle the desktop](#) and/or some of the desktop elements (books, pages, portlets) to visitor entitlement roles.
5. To see your desktop in a browser, select your desktop in the Portal Resource tree, right click, and select View Desktop.

### Related Topics:

- [Overview of Desktops](#)
- [How Do I Create Multi-Channel Portals?](#)
- [How Do I Change the Way My Portal Looks?](#)
- [How Do I Add Content to My Portal?](#)
- [How Do I Entitle Users to See Specific Parts of My Portal?](#)

## How Do I Create (Duplicate) a New Portlet?

Administrators can create new portlets by duplicating and modifying properties and preferences portlets already available in the Portal Library. You can then add these portlets to pages in your portal as you would any other portlet.

Follow this example to create (duplicate) a portlet:

1. Select Portals under Portal Management in the top Menu in the Editor pane.
2. Select sampleportal as the Web application in the Portal Web Application drop-down menu, if it is not already selected.
3. In the Portal Resource tree, select Library -> All Portlets.
4. In the Editor pane, click the Duplicate button next to the RSS News Feed portlet. The duplicate of the portlet appears at the bottom of the list.
5. Click on the new portlet.
6. Rename the portlet by modifying the [portlet properties](#).
7. [Edit](#) the portlet preferences or [create](#) new ones for your new portlet.
8. You can also add your new portlet to a [portlet category](#).

### Related Topics:

- [How Do I Set Up a New Administrator?](#)
- [How Do I Entitle Users to See Specific Parts of My Portal?](#)
- [Rearrange Portlets on a Page](#)
- [Create a Page](#)
- [Create a Portlet Category](#)
- [Modify Portlet Preferences](#)

## Create a Portlet Preference

A portlet preference is a property in a portlet that can be customized by either an administrator or a user. Your portlet may already have preferences, but if you have the appropriate Delegated Administration rights you can create additional portlet preferences.

To see an example of a portlet with several preferences:

1. In the Portal Resource tree, and navigate to Library -> All Portlets -> RSS News Feed.
2. Select the Portlet Preferences tab in the Editor pane if not already selected.

Notice the types of Names and values for this portlet preference. You can create new preferences using the instructions below, and you can [edit](#) existing preferences.

To create a portlet preference:

1. In the Portal Resource tree, expand the Library.
2. Expand All Portlets, and select a portlet from the list.
3. Select the Portlet Preferences tab in the Editor pane, if not already selected.
4. Click Create New Preferences.
5. Fill in the information in the fields. Use the table below for guidance.

For this Field:	Enter This Information:
Preference Name	The name you want to give this preference. It will be listed this way.
Preference Description	A meaningful description of this preference.
Preference Value	A value for a preference. For example: True or False.
Is Multi-Valued (checkbox)	Identify this preference as one that will have more than one value. Use the Add New Value field allows you to input additional values for this preference.
Is Modifiable (checkbox)	Allows you to designate whether end users can modify this portlet.
Propagate value(s) to all instances of this Portlet (checkbox)	Allows you to designate this preference to be propagated through every instance of this portal.

6. Click Save Portlet Preference.

## Related Topics:

- [Edit Portlet Preferences](#)
- [Modify Portlet Properties](#)
- [Add a Portlet to a Page](#)
- [Create a Portlet Category](#)

## Create a Portlet Category

Portlet categories provide for the classification of portlets, which is useful when organizing a large collection of portlets into meaningful groupings. The portlet categories are similar to other hierarchical structures in that parent “folders” can contain child folders and/or portlets. You must first create a portlet category, and then you can [manage](#) portlets by adding them to a category or moving them between categories.

To create portlet category:

1. In the Portal Resource tree, select Library -> Portlet Category.
2. Right click portlet category, and select Add New Category.
3. Type in the name of the new category in the pop-up window.
4. Click OK.

Now you can [add](#) portlets to your new category.

Related Topics:

- [Duplicate a Portlet](#)
- [Add a Portlet to Page](#)
- [Manage Portlet Properties](#)

## Duplicate a Portlet in the Portal Library

The WebLogic Administration Portal allows you to duplicate a portlet in the Portal Library to use as a template for a new Portlet.

To duplicate a portlet:

1. In the Portal Resource tree, Library -> All Portlets.
2. In the Editor Pane, click the Duplicate button next to the appropriate portlet. The portlet appears at the bottom of the list.

You can now customize the portlet by modifying its [properties](#) and [preferences](#).

### Related Topics

- [Create a Portlet Category](#)
- [Create a Page](#)
- [Position Portlets on a Page](#)



## How Do I Create Configurable Portlets?

A configurable portlet is one that has portlet preference that either other administrators or even end users can modify.

A portlet preference is a property in a portlet that can be customized by either an administrator or a user. Unlike regular portlet properties (locale, name, description) that pertain to a portlet, a portlet preference allows you to define preferences on how a portlet performs or what it displays.

### **To see a portlet with configurable preferences:**

1. Select Portals under Portal Management in the top Menu in the Editor pane.
2. Expand the Library in the Portal Resource tree, and select All Portlets.
3. Select the RSS News Feed portlet.
4. Click the Edit button next to each preference to see the field that you can edit.

### Related Topics:

- [Create a Portlet Preference](#)
- [Edit a Portlet Preference](#)
- [Modify Portlet Properties](#)
- [Create a Portlet Category](#)
- [How Do I Create \(Duplicate\) a New Portlet?](#)
- [How Do I Change the Appearance of a Portal?](#)
- [How Do I Add Content to a Portal?](#)
- [How Do I Entitle Users to See Specific Parts of My Portal?](#)

## Remove Delegated Administration of Portal Resources

As an administrator, you can rescind the rights of a Delegated Administration role to manage portal resources.

To remove portal resources from a Delegated Administration role:

1. In the Portal Resource tree, select the portal resource you want to remove from a role.
2. Selected the Edit Delegated Administration tab in the Editor pane to the the right, if it is not already open.
3. Use the drop-down menu in the Delegated Administration editor to select a role. (The role appears in the Can Manage box.)
4. If you want to remove the portal resource from more than one role, repeat Step 3 until all of the roles are listed in the Can Manage box.
5. Check the box to the left of each role.
6. Click Remove.

### Related Topics:

- [Overview of Role Hierarchy](#)
- [Overview of Delegated Administration](#)

## Add a User to a Group

A group is simply a collection of users together under a specific name, for example, Human Resources. When you create a user, you automatically add it to a group, but a user can be a member of an infinite number of groups.

After being added to a group, a user will inherit any administrative entitlements that the group already has.

When you add a user to a group, you are merely including the user's name as a member of the group. It is important to note that by simply adding a user to a group, you are NOT necessary, adding the user or group to a role. For example, if the role definition is Group=X and the users are placed in group X, they will satisfy that role. If the role is Group X and Session Property = Y, they may or may not satisfy the role.

For information about mapping users and groups of users to administrative roles, see [Overview of Roles](#). You can add a user to a group two different ways:

To add user(s) to a single group:

1. In the Users and Groups Resource tree, select the group to which you want to add a user.
2. Select the Add Users tab.
3. Type the user's name in the Login ID field and click Search. To select multiple users, click a letter in the Quick Search field. Selected users appear in the Select box.
4. Click the check box next to each user to select it, and click Select Users. Selected users now appear in the Edit box.
5. Click the Add User(s) to Group button.

**To add user(s) to multiple groups:**

1. [Find](#) the user you want to remove.
2. Click Edit Profile Values.
3. Select the Edit Group Memberships tab. Groups to which the user belongs are listed.
4. Click Add User to More Groups.
5. In the User Group Resource tree, click Add to the right of the appropriate groups. Selected groups will appear in the Editor pane to the right.
6. Click the Add User to Group(s) button.

Related Topics:

- [List a User's Group Membership](#)

- [Remove a User from a Group](#)
- [Create a New User](#)
- [Create a New Group](#)
- [Edit User Profiles](#)
- [How Do I Set Up a New Administrator?](#)
- [How Do I Entitle Users to See Specific Parts of My Portal?](#)

## Create a Group

A group is simply a collection of users. When you first create a group, you create an empty group to which you can add an infinite number of users. You can then classify the users in the group by mapping the group to an entitlement role or a content segment.

You can also create groups inside of groups, thus creating sub-groups that inherit properties from the parent group. For more information about group hierarchy, see the [Overview of Group Hierarchy](#).

**Note:** Users can be members of more than one group.

You can create a group by two methods:

### Method 1:

1. In the User-Groups Resource tree, select a parent group. To create a group at the top level, select All Groups.
2. Right click, and select Add User Group.
3. Click OK.

### Method 2:

1. In the User Group Resource tree, select a parent group. To create a group at the top level, select All Groups.
2. Click the Create Group icon in the top right toolbar.
3. Enter the name of the group in the pop-up window, and click OK.

You can now perform the following tasks in your new groups:

- Add users to your new group. See [Add Users to a Group](#).
- Map your group to a Delegated Administration role. See [Add Group to a Role](#).

### Related Topics:

- [Delete a Group](#)
- [Move a Group - Change a Group's Position in the Group Hierarchy](#)
- [Create a New User](#)
- [Overview of User Segments](#)

## Edit User Profile Values

A user profile is a schema that determines which data you collect and store about a user. Each piece of data in a user profile is called a user property. User properties can range from statically-defined properties, such as a user's Social Security number, to dynamically-created and persisted properties, such as Web-site tracking information for a particular user, or user preferences entered from a standard input screen.

User properties can be used to target users with personalized content and pre-populating forms. These properties, such as address information, employment details, personal interests, and investing characteristics, appear as editable fields in the WebLogic Administration Portal.

To edit user profile values:

1. [Find](#) the user whose profile you wish to edit.
2. Click Edit Profile Values.
3. Use the drop-down menu to select a [property set](#). The editable properties appear in the Name, Value, and Description fields.

**Note:** If the user has no profile values, a No property sets found for this object message appears in the Editor pane.

4. Click the box next to a user to expand the associated editor.
5. Update the user's properties. The properties vary depending on what has been set up for the user.
6. Click Update Value.
7. Repeat steps 4-7 for each profile value as needed.

Related Topics:

- [Overview of Interaction Management](#)
- [Create a New User](#)
- [Add User to a Group](#)
- [Assign Groups to a Delegated Administration Role](#)

## Remove a User from a Group

A group does not "own" a user, so you can add and remove users to groups without affecting the user's properties. As a member of a group, a user inherits the group's classification ([segments](#)). Removing a user from a group removes the user from roles predicated on membership in that group, but it does not change the individual user's properties.

For example, you might remove a user from a group to change the user's classification and privileges. You could remove a user from the PortalSystemAdministrators group, which maps to the PortalSystemAdministrator role. Removing the user from this group means that he or she will no longer have the privileges associated with the PortalSystemAdministrator role.

You can move users from a group two different ways:

To remove users from a group:

1. In the Users and Groups Resource tree, select the group to which you want to add a user.
2. Select the Edit Users in a Group tab.
3. Type the user's name in the Login ID field and click Search. To select multiple users, click a letter in the Quick Search field. Selected users appear in the Select box.
4. Click the check box next to each user to select it, and click Select Users. Selected users now appear in the Edit box.
5. Click Remove Users from Group.

To remove users from multiple groups:

1. [Find](#) the user you want to remove.
2. Click Edit Profile Values.
3. Select the Edit Group Memberships tab. Groups to which the user belongs are listed.
4. Click the box next to the appropriate group.
5. Click the Remove User from Group(s) button.

Related Topics:

- [List a User's Group Membership](#)
- [Create a New User](#)
- [Create a New Group](#)
- [Overview of Interaction Management](#)
- [Overview of User Segments](#)
- [Overview of Delegated Administration](#)

## List a User's Group Membership

A user can belong to more than one group. If you want to see all of the groups to which a user belongs, use the following instructions.

To see a list of groups of which a user is a member:

1. [Find](#) the user you want to list.
2. Select the Group Memberships tab. Groups to which the user belongs are listed.

### Related Topics:

- [Remove a User from a Group](#)
- [Add a User to a Group](#)
- [Assign Delegated Administration Rights to a User](#)
- [Create a New User](#)
- [Create New Group](#)
- [Create a New Delegated Administration Role](#)



## Add a Group to a Delegated Administration Role

A group is a static collection of users that administrators set up and maintain in the WebLogic Administration Portal or LDAP. A Delegated Administration role is a dynamic classification of users that is determined by the expressions, or characteristics, that you define in the administration portal as well. When you add a group of users to a role, you grant that collective group of users access to all of the administrative rights attributed to that role.

### **ROD - is this correct about users and how they are maintained in LDAP?**

To add a group to a Delegated Administration role:

1. In the Delegated Administration Resource tree, select the role to which you want to add groups of users.
2. Select the Add Groups to Role tab.
3. Select the group you want to add by clicking the arrow to the right of the group name. The selected group now appears in the Edit box. Repeat these steps to select multiple groups.
4. Click the check box next to each group to select it, and click Add Group(s) to Role button.
5. Click the Role Properties tab and confirm that the groups have been successfully added to the role.

**Note:** When you are establishing your role hierarchy, keep in mind that child roles within a Delegated Administration role must be unique. For example, you cannot have a Delegated Administration role called RoleA with a child role of Role 4 if you already have a child role called Role 4 elsewhere in the hierarchy.

### Related Topics:

- [Create a New Group](#)
- [Assign Portal Resources to a Delegated Administration Role](#)
- [Assign Interaction Management Resources to a Delegated Administration Role](#)
- [Assign Content Management Resources to a Delegated Administration Role](#)
- [Overview of Users and Groups](#)
- [Create a Delegated Administration Role](#)

## Remove Users from a Delegated Administration Role

If you want to remove a specific user or a set of users who are no longer eligible for an administration role, use these instructions to select the users and remove them from the selected role.

To remove users from a role:

1. In the Delegated Administration Resource tree, select the role from which you want to remove users. The role's properties are displayed in the Role Properties tab within the Editor pane.
2. Click the check box next to the user you want to remove.
3. Click Remove User(s) from Role.

### Related Topics:

- [Remove Groups from a Delegated Administration Role](#)
- [Add Users to a Delegated Administration Role](#)
- [Add Groups to a Delegated Administration Role](#)

## Remove a Group from a Delegated Administration Role

If you want to remove a group of users from an administration role, use these instructions to select the group and remove it from the selected role.

To remove a group from a role:

1. In the Delegated Administration Resource tree, select the role from which you want to remove a group of users. The role's properties are displayed in the Role Properties tab within the Editor pane.
2. Click the check box next to the group you want to remove.
3. Click Remove Group(s) from Role.

### Related Topics:

- [Remove Users from a Delegated Administration Role](#)
- [Add a Group to a Delegated Administration Role](#)
- [Create a New Group](#)
- [Add Users to a Group](#)

## How Do I Update User Information?

User information is compiled in a user profile that can be stored in an directory server (i.e. LDAP) or relational database. The Administration Portal provides an editor that allows you to update the user profile data in the system regardless of how it is stored.

The following information is available to help you understand and update information about users and groups:

- [Overview of Users and Groups](#)  
Provides a detailed overview of the way users and groups are handled in the Administration Portal.
- [Overview of User Profiles](#)  
Provides a detailed description of user profiles, property sets, property set types, and security issues.
- [Edit User Profile Values](#)  
Provides instructions for editing user profile values in the Administration Portal.

### Related Topics:

- [How Do I Create a New Administrator?](#)
- [How Do I Entitle Users to See Specific Parts of My Portal](#)
- [Overview of Security](#)
- [Overview of Portal Administration](#)

## Overview of User Profiles and Property Sets

A user profile is a schema that determines which data you collect and store about a user. Similarly, a group profile is a schema that determines which data you collect and store about a specific group of users. Each piece of data in a user profile is called a user property. A user profile is the entire collection of user property values for a user from all available user property sets.

User properties can range from statically-defined properties, such as a user's Social Security number, to dynamically-created and persisted properties, such as Web-site tracking information for a particular user, or user preferences entered from a standard input screen.

User profiles use property sets to organize the properties that they contain. A property set is a convenient way to give a name to a group of properties for a specific purpose.

A property set type establishes a set of expectations for how a property set is used. For example, a property set for users called "personal" could contain such properties as age, gender, marital status, and social security number. Another property set called "preferences" could contain such properties as hobby, favorite color, and news preference.

User profiles are a key component in Interaction Management. When users log in to a portal, the portal knows all their property values and can target them with personalized content, e-mails, and discounts based on the personalization rules you set up.

## Security and User Profiles

User profiles are a key component in portal security. When you use visitor entitlements to limit end user access to portal resources (desktops, books, pages, portlets, and other resources), the visitor entitlements can be defined with user properties. For example, you could create a visitor entitlement role called "manager" that says, "If a user who logs in has an "employee\_type" property with a value of "manager," that user belongs to the "manager" role. You could then select a portlet and set its visitor entitlement to the "manager" role. Then, when a manager logs in, the manager sees the portlet. If a non-manager logs in, the person does not see the portlet.

User profiles also play a role in setting up delegated administration. You can create Delegated Administration roles using, among other things, user properties.

When setting up visitor entitlements and delegated administration, you will see the following option: "The user has specific characteristics." (Double-check that option name). This is the option you use to select user profile properties in defining the visitor entitlement or Delegated Administration role.

## Related Topics:

- [Security Overview](#)
- [Edit User Profile Values](#)
- [Overview of Interaction Management](#)

## Overview of Security

The fundamentals of portal security are user authentication and user authorization.

Authentication means the correct user is granted access to a specified portal or to a specified private or restricted area. After the user has been authenticated, authorization means the correct user is granted access to the specified portal resource, now that the system recognizes the user. Some of the core components of authentication and authorization are [Entitlements](#) and [Delegated Administration](#).

There are three different layers that portal security depends upon:

- User credentials
- Security policies
- Role policies

Other key factors in portal security are associating users with roles and groups and creating security policies that map the access of portal resources. In addition, user credential management, network security, and WebLogic Server security can affect portal security.

As an administrator, you should have a clear understanding of how Entitlements and Delegated Administration work. You should also be comfortable with role policies and security policies.

The WebLogic Administration Portal is a major factor in implementing security on top of WebLogic Server by provides the following functionality that can play a vital role in portal security:

- [Creating users](#)
- [Creating groups](#)
- Mapping users to groups and roles
- Creating [Delegated Administration roles](#)
- Mapping [users](#) to those roles
- Creating [portals](#) and portal resources
- Controlling user and administrator access to portal resources with [Entitlements](#)

### Related Topics:

- [Overview of Delegated Administration](#)
- [Overview of Visitor Entitlements](#)
- [Overview of Users and Groups](#)

## Add Users to Administrative Roles with Expressions

Using expressions, administrators can define conditions based on attributes in user's profile and date/time to evaluate a Delegated Administration role. This feature is extremely powerful as it provides the Dynamic Role Association to take place based on the contextual information.

When you select a condition in the Editor pane, a small editor appears in which you can select and modify the conditions. Expressions may be set up in a union or intersection relationship with [user or group](#) predicates.

To add users to a role with expressions:

1. In the Delegated Administration Resource tree, select the role to which you want to add users.
2. Select the Edit Role Expressions Tab (if not already selected).
3. Use the pulldown menu to designate whether All of the conditions or Any of the conditions should be met, and click Save Changes.
4. You can modify the following conditions in the Expressions editor:
  - The date is:
  - It is after a given date:
  - It is after a given date and time:
  - It is between two times:
  - It is between two dates:
  - It is between two date/times:
  - The visitor has specific characteristics:
    - Property Set
    - Property
    - Value Phrase
5. To modify a date or time condition, click the box next to the condition, then use the calendar tool to set the specific condition.
6. To modify the visitor characteristics, use the pull-down menus next to each condition. You can also click the Add New Value Phrase or Add Descriptor buttons to further modify the visitor characteristics.
7. Click Save Changes at the top of the Editor pane to apply your edits.

### Related Topics:

- [Add a User to a Delegated Administration Role](#)
- [Add a Group to a Delegated Administration Role](#)
- [Create a New User](#)
- [Overview of Delegated Administration](#)



## Assign Groups to a Delegated Administration Role

Delegated Administration roles are dynamic classifications of users who meet specific requirements. They are used to determine whether to grant or deny access to resources, and to determine which capabilities on those resources are available to the user. You can assign individual users and groups to predefined Delegated Administration roles to grant them with the access rights afforded to that [role](#).

To assign groups to a Delegated Administration role:

1. In the User Group Resource tree, select the group you want to assign to a role.
2. Selected the Edit Delegated Administration tab.
3. Use the drop-down menu in the Delegated Administration editor to select a role.
4. Click Add Role.
5. Check the box next to each administrative right you want to grant.
6. Click Update.

### Related Topics:

- [Create a Delegated Administration Role](#)
- [Remove Users \(or Groups\) from a Delegated Administration Role](#)
- [Assign Portal Resources to a Delegated Administration Role](#)
- [Assign Interaction Management Resources to a Delegated Administration Role](#)
- [Assign Content Management Resources to a Delegated Administration Role](#)
- [How Do I Set Up a New Administrator?](#)
- [How Do I Entitle Users to See Specific Parts of My Portal?](#)

## Assign Delegated Administration of Content Management Resources

Delegated Administration roles are dynamic classifications of users that determine user access to resources in the WebLogic Administration Portal. These roles are used to determine whether to grant or deny access to resources, and to determine which capabilities on those resources are available to the administrator.

As an administrator, you can delegate the administration of Content Management resources.

### **To assign Content Management resources to a Delegated Administration role:**

**Note:** Before you can assign Content Management resources to a Delegated Administration role, you must make sure the role exists and has Delegated Administration rights assigned to it. If no role exists, you must [create](#) it, then you can add users and content resources to it. For detailed information about setting up administrators, see [How Do I Set Up a New Administrator?](#)

To assign Content Management resources to a Delegated Administration role:

1. In the Content Hierarchy Resource tree, select the content resource you want to assign to a role.
2. Select the Edit Delegated Admin tab in the Editor pane to the the right, if it is not already open.
3. Use the drop-down menu in the Editor pane to select a role. (The role appears in the Can Manage box.)
4. If you want to assign the content resource to more than one role, repeat Step 3 until all of the roles are listed in the Can Manage box.
5. Check the Can Manage box next to each role.
6. Click Update.
7. To confirm the role has been assigned, select the resource in the Resource tree, then view the Edit Delegated Admin tab in the Editor pane. The role name should appear with the Can Manage box selected.

### Related Topics:

- [Overview of Role Hierarchy](#)
- [Overview of Delegated Administration](#)

## Add Groups to a Visitor Role

As an administrator, you can add groups to a visitor role.

To add groups to a Visitor Role:

1. In the Visitor Roles Resource tree, select the Visitor Role to which you want to add groups.
2. Click the Add Groups to Role tab in the Editor pane.
3. A Resource tree for all user groups is displayed. Click on the icon to the right of the group in the tree to add it to the current Visitor Role.
4. Click Commit Selected.
5. The group is then added to the designated visitor role and can be verified by clicking the Role Properties tab for a list of groups assigned to that role.

Related Topics:

- [Add Users to a Visitor Role](#)
- [Create a Visitor Role](#)
- [Assign Visitor Entitlement Role to a Delegated Administration Role](#)
- [Remove Visitor Entitlement Role from a Delegated Administration Role](#)
- [Delete a Visitor Role](#)
- [Edit Visitor Role Expressions](#)
- [Modify Visitor Role Properties](#)
- [Rename a Visitor Role](#)

## Assign a Visitor Entitlement Role to a Delegated Administration Role

Delegated Administration roles are dynamic classifications of users that determine user access to resources in the WebLogic Administration Portal. These roles are used to determine whether to grant or deny access to resources, and to determine which capabilities on those resources are available to the administrator.

As an administrator, you can delegate the administration of Visitor Entitlement roles.

**Note:** Before you can assign Visitor Entitlement Roles to a Delegated Administration role, you must make sure the Delegated Administration role exists and has Delegated Administration rights assigned to it. If no role exists, you must [create](#) it, then you can add users and Visitor Entitlement roles to it. For detailed information about setting up administrators, see [How Do I Set Up a New Administrator?](#)

To assign Visitor Entitlement Roles to a Delegated Administration role:

1. In the Visitor Entitlements Resource tree, select the visitor role you want to assign to a Delegated Administration role.
2. Select the Edit Delegated Admin tab in the Editor pane to the the right, if it is not already open.
3. Use the drop-down menu in the Editor pane to select a Delegated Administration role. (The role appears in the Can Manage box.)
4. If you want to assign the visitor role to more than one Delegated Administration role, repeat Step 3 until all of the roles are listed in the Can Manage box.
5. Check the Can Manage box next to each role.
6. Click Update.
7. To confirm the role has been assigned, select the resource in the Resource tree, then view the Edit Delegated Admin tab in the Editor pane. The role name should appear with the Can Manage box selected

### Related Topics:

- [Overview of Role Hierarchy](#)
- [Overview of Delegated Administration](#)
- [Add Users to a Visitor Role](#)
- [Add Groups to a Visitor Role](#)
- [Create a Visitor Role](#)
- [Remove a Visitor Entitlement Role from a Delegated Administration Role](#)
- [Delete a Visitor Role](#)
- [Edit Visitor Role Expressions](#)

- [Modify Visitor Role Properties](#)
- [Rename a Visitor Role](#)

## Remove a Visitor Entitlement Role from a Delegated Administration Role

As an administrator, you can rescind the rights of a Delegated Administration role to manage a Visitor Entitlement role.

To remove a Visitor Role from a Delegated Administration role:

1. In the Visitor Role Resource tree, select the visitor role you want to remove from a Delegated Administration role.
2. Selected the Edit Delegated Administration tab in the Editor pane to the right, if it is not already open.
3. Use the drop-down menu in the Delegated Administration editor to select the Delegated Administration role to be removed.
4. If you want to remove the Visitor Role from more than one Delegated Administration role, repeat Step 3 until all of the roles are listed.
5. Check the box next to each role and click Remove Selected Roles.
6. Click Save.

### Related Topics:

- [Overview of Role Hierarchy](#)
- [Overview of Delegated Administration](#)
- [Add Users to a Visitor Role](#)
- [Add Groups to a Visitor Role](#)
- [Create a Visitor Role](#)
- [Assign Visitor Entitlement Role to a Delegated Administration Role](#)
- [Delete a Visitor Role](#)
- [Edit Visitor Role Expressions](#)
- [Modify Visitor Role Properties](#)
- [Rename a Visitor Role](#)

## Delete a Visitor Role

As an administrator, you can delete a Visitor Role from the Resource tree.

To delete a Visitor Role:

### Method 1

1. In the Visitor Entitlements Resource tree, select the Visitor Role you want to delete.
2. Right-click on the role.
3. Select Delete Role from the pop-up menu.

### Method 2

1. In the Visitor Entitlements Resource tree, select the Visitor Role you want to delete.
2. In the Editor pane, click on Delete Role or the trash can icon.

The Visitor Role is deleted from the Visitor Role Resource tree.

Related Topics:

- [Add Users to a Visitor Role](#)
- [Add Groups to a Visitor Role](#)
- [Create a Visitor Role](#)
- [Assign a Visitor Entitlement Role to a Delegated Administration Role](#)
- [Remove a Visitor Entitlement Role from a Delegated Administration Role](#)
- [Edit Visitor Role Expressions](#)
- [Modify Visitor Role Properties](#)
- [Rename a Visitor Role](#)

## Edit a Visitor Role Expression

As an administrator, you can edit the expression conditions that define a Visitor Entitlement role.

To edit a Visitor Role expression:

1. In the Visitor Entitlements Resource tree, select the Visitor Role you want to edit.
2. Click the Edit Role Expression tab in the Editor pane.
3. In the Editor pane using the pull-down menu, specify whether any or all of the conditions must apply.
4. Click Save Changes at the top of the conditions panel.
5. Specify the conditions as desired:
  - The date is: (Specify a given date.)
  - It is after a given date: (Specify a given date.)
  - It is after a given date and time: (Specify a given date and time.)
  - It is between two times: (Specify a time range.)
  - It is between two dates: (Specify a date range.)
  - It is between two date/times: (Specify a range of dates and a range of times.)
  - The visitor has specific characteristics: (Specify a property value from the pull-down menu.)
6. Click Save Changes at the bottom of the conditions panel.

### Related Topics:

- [Add Users to a Visitor Role](#)
- [Add Groups to a Visitor Role](#)
- [Create a Visitor Role](#)
- [Assign a Visitor Entitlement Role to a Delegated Administration Role](#)
- [Remove a Visitor Entitlement Role from a Delegated Administration Role](#)
- [Delete a Visitor Role](#)
- [Modify Visitor Role Properties](#)
- [Rename a Visitor Role](#)



## Modify Visitor Role Properties

As an administrator, you can modify Visitor Role properties by:

- Removing users or groups from the role
- Changing the expression criteria.

To remove users or groups from a Visitor Role:

1. In the Visitor Role Resource tree, select the Visitor Role you want to modify.
2. Under the Role Properties tab in the Editor pane, click in the box next to the groups and/or user you want to remove from the role.
3. Click Remove Group(s) to delete groups, and click Remove User(s) from Role to delete users.

The selected groups and/or users are removed from the Visitor Role.

To modify the expression criteria:

1. In the Visitor Role Resource tree, select the Visitor Role you want to modify.
2. Under the Role Properties tab in the Editor pane, go to the Members of this Role must be in the specified Users or Groups field.
3. Select And match the Expression or select OR match the Expression depending on how you want to modify the expression criteria. Click Save.

**Note:** You will only be able to modify the expression criteria if the role has an expression already defined.

Related Topics:

- [Add Users to a Visitor Role](#)
- [Add Groups to a Visitor Role](#)
- [Create a Visitor Role](#)
- [Assign a Visitor Entitlement Role to a Delegated Administration Role](#)
- [Remove a Visitor Entitlement Role from a Delegated Administration Role](#)
- [Delete a Visitor Role](#)
- [Edit Visitor Role Expressions](#)
- [Rename a Visitor Role](#)

## Rename a Visitor Role

As an administrator, you can rename a Visitor Role in the Resource tree.

To rename a Visitor Role:

### Method 1

1. In the Visitor Entitlements Resource tree, select the Visitor Role you want to rename.
2. Right-click on the role.
3. Select Rename Role from the pop-up menu.
4. In the pop-up window, enter the new name for the Visitor Role, and click OK.

### Method 2

1. In the Visitor Entitlements Resource tree, select the Visitor Role you want to rename.
2. In the Editor pane, click on Rename Role or the text icon.

The renamed role now appears in the Visitor Role Resource tree.

Related Topics:

- [Add Users to a Visitor Role](#)
- [Add Groups to a Visitor Role](#)
- [Create a Visitor Role](#)
- [Assign a Visitor Entitlement Role to a Delegated Administration Role](#)
- [Remove a Visitor Entitlement Role from a Delegated Administration Role](#)
- [Delete a Visitor Role](#)
- [Edit Visitor Role Expressions](#)
- [Modify Visitor Role Properties](#)

## Overview of Group Hierarchy

A group, also known as a user-group, is a named collection of users in the user management system. Groups provide a convenient way to refer to a related group of users, such as a department, team, or regional office.

Because groups can belong to other groups, they provide a way to easily sub-classify users with a group hierarchy tailored to fit your needs.

For example, you might have a top-level group called AllEmployees that contains all of the employees in your company. The AllEmployees group might then contain other groups, each of which contains just the employees of offices in various geographic locations:

- AllEmployees (group containing all employees)
  - NewYork (group containing just employees in New York)
  - SanFrancisco (group containing just employees in San Francisco)
  - Seattle (group containing just employees in Seattle)
  - Denver (group containing just employees in Denver)

### Related Topics:

- [Create a Group](#)
- [Move a Group](#)
- [Add Users to a Group](#)
- [Assign Delegated Administration Rights to a Group](#)

## Move a Group - Change a Group's Position in the Group Hierarchy

A group is a collection of users, and a child group is a subset of a larger group. The child group has a parent-child relationship with the primary group and inherits the group's properties, but it can also contain unique properties.

When you create a group, you create it either as a parent group at the top level or as a child group within another group. If you want to change the [hierarchy](#) of your groups and subgroups, you can easily move an existing subgroup from one group to another or change its status from parent group to a child group.

To move a group in the group hierarchy:

1. In the User Group Resource tree, select the group you want to move.
2. Click the Add Groups to Group Tab.
3. In the User Group Resource tree, click the arrow next to the group you want to move.
4. In the Editor pane to the right, click the box next to each group to select it.
5. Click Add Groups to Group to sub-classify a group to another. Click Remove to move a group from a child to a parent position in the hierarchy.

Related Topics:

- [Create a Group](#)
- [Delete a Group](#)
- [Delete a User](#)

## Administering Portals with the WebLogic Administration Portal

Portal administration involves many traditional system administration activities, as well as tasks that control the behavior, content, and appearance of portals. While portal administrators do not typically develop the resources required for a portal Web site, they use those resources to build, maintain, and modify portals.

The WebLogic Administration Portal provides you with the tools to administer portal Web sites built with BEA WebLogic Platform:

- **Portal Management:** Portals, desktops, books, pages, portlets, and other portal resources
- **Content Management:** Content and repositories
- **User Management:** User and group management, delegated administration, entitlements
- **Interaction Management:** Campaigns, Placeholders, Content Selectors, and User Segments
- **Service Administration:** Server settings
- **Search:** Search within WebLogic Administration Portal

### The Portal Administrator

As an administrator, you can use the administration portal to manage other [users, groups, and roles](#) to control access to the applications and assets available on a portal server.

Depending on the type of [authority granted](#), an administrator can perform administrative tasks such as [creating new portals](#), [modifying the authority of visitors](#) and other administrators, and [modifying many of the attributes displayed in the portal](#). Administrators can have further control over user access by creating roles to suit the types of activities that a user (either other administrators or visitors to the portal) will undertake when using the system.

Administrators of portal assets in the Portal Library can work with portal applications and portal components to create the portals that are available to portal administrators and users.

### What is a Portal?

A portal is a doorway, an entrance, or a gateway. Similarly, a portal application acts as an entrance or a gateway to content and applications that users must access to complete business transactions, locate and acquire information, or collaborate with other users. Portals provide the following benefits to the user:

- **Aggregation** – The user can go to a single place to access all information and

applications.

- **Customization** – Users and administrators can be granted the ability to manage portal appearance and behavior based on their personal preferences or audience requirements.
- **Personalization** – Business policies can be used to deliver specific information and content to the user based on profile attributes and behavior.
- **Integration** – Multiple applications, composite applications, and content sources can be presented to the user in a unified way.

The portal provides dynamic provisioning of portal components based on user, group, and role attributes. The portal acts as both a controller, by determining the context of the user, and a container, by aggregating and presenting applications and information based on the intersection of business policies and access privileges of the portal user.

## Portal Business Services

WebLogic Portal includes the following portal business services:

- **Content Management** – Enables the creation, management, and delivery of content and repositories
- **Search** – Offers enterprise and web-based search capability
- **Collaboration** – Provides connectivity to personal information management applications and supports team and group communication
- **Interaction Management** – Provides tools for personalizing the user experience and driving portal usage to meet business goals
- **Commerce** – Supports business-to-consumer or business-to-business scenarios

## Portal Enterprise Services

WebLogic Portal also supports the following enterprise services:

- **Business Process Management** – Provides support for connecting portal users to business processes and allows portal applications to participate in business processes
- **Single Sign-On** – Allows users to log on once for all applications accessed from the portal

## Related Topics:

- [Overview of Users and Groups](#)
- [Overview of Delegated Administration](#)
- [Overview of Visitor Entitlements](#)
- [Overview of Interaction Management](#)
- [Overview of Content Management](#)

- [Overview of Portal Management](#)
- [Overview of Server Administration](#)

## Overview of Service Administration

WebLogic Portal provides a single framework for configuring, accessing, monitoring, and maintaining caches. If configured properly, the caches can reduce the time needed to retrieve frequently used data.

Many WebLogic Portal services use preconfigured caches that you can tune to meet your performance needs. Some services use internally configured caches that you cannot configure or access. If you extend or create additional services, developers can use the cache framework to define and use your own set of caches, and make them available to you in the WebLogic Administration Portal.

The administration portal allows you to configure the following default services:

- [AdContentProvider](#)
- [Ad Service](#)
- [Behavior Tracking Service](#)
- [Caches](#)
- [Campaign Service](#)
- [Document Connection Pool](#)
- [Document Manager](#)
- [Event Service](#)
- [Mail Service](#)
- [Payment Service Client](#)
- [Scenario Service](#)
- [Tax Service Client](#)



## Configure New Content Provider

For each of the three Ad Service attributes, you can add a new content provider.

To create a new content provider for an Ad Service attribute:

1. In the Application Configuration Settings Resource tree, select Ad Service Group, click one of the Ad Service attributes (for example: image, text, application/x-shockwave-flash).

**Note:** If Ad Group does not appear in the Resource tree to the left, follow the instructions [Add or Remove a Configurable Item](#) to add it, and continue with step 2.

2. Enter a name for the new content provider in the Content Provider field. For detailed descriptions of the content provider fields, see [New Content Provider Configuration Parameters](#).
3. Fill in the Properties field.
4. Click Update.

### Related Topics:

- [Configure the Ad Service](#)
- [Content Provider Configuration Parameters](#)

## Configure the Ad Service

As an administrator, you can configure the Ad Service.

To configure the Ad Service:

1. In the Application Configuration Settings Resource tree, select Ad Service Group.

**Note:** If Ad Services does not appear in the Resource tree to the left, follow the instructions [Add or Remove a Configurable Item](#) to add it, and restart this process at step 1.

2. Fill in the fields to configure the Ad Service. For detailed descriptions of the Ad Service configuration fields, see [Ad Service Field Descriptions](#).
3. Click Update.

A message at the bottom of the window indicates that your changes have been applied.

Related Topics:

- [Create a New Content Provider](#)
- [Configurable Services](#)
- [Ad Service Field Descriptions](#)

## Configure the Behavior Tracking Service

The Event system provides you with the ability to identify the interactions that visitors have with your portal or Web site. One of the primary uses of events is in customer interactions such as promotions or Campaigns. A simple example of using events in a Campaign is triggering the display of an ad for a related product when a customer places an item in a shopping cart.

Another primary use of events is to track visitor behavior by recording events. Recording events is more than just navigation logging, which tells you only what pages were visited. Behavior Tracking allows you to know what the visitor saw and responded to, or equally important, ignored on a page.

As an administrator, you can modify the configuration settings for the Behavior Tracking Service.

To configure the Behavior Tracking Service:

1. In the Application Configuration Settings Resource tree, select Behavior Tracking Service.

**Note:** If Behavior Tracking Service does not appear in the Resource tree to the left, follow the instructions [Add or Remove a Configurable Item](#) to add it, and restart this process at step 1.

2. Fill in the fields to configure the Behavior Tracking Service. To select a Persisted Event Type, you must double click the item in the window. For detailed descriptions of the configuration setting fields, see [Behavior Tracking Configuration Parameters](#).
3. Click Update.

A message at the bottom of the window indicates that your changes have been applied.

Related Topics:

- [Configurable Services](#)
- [Add or Remove a Configurable Item](#)
- [Behavior Tracking Configuration Parameters](#)

## Create a Cache

The Administration Portal provides several default caches, but you can create unique caches to meet your own needs. Creating a cache allows you to set up a cache that has specific parameters that you can later modify as needed.

To create a cache:

1. In the Application Configuration Settings Resource tree, select Cache Manager.
2. Fill in the fields to set up your new cache. For detailed descriptions of the cache creation fields, see [Create Cache Configuration Parameters](#).
3. Click Create.

Your new cache will appear in the Application Configuration Settings Resource tree under Cache Manager. To remove it from the tree, follow the instructions [Add or Remove a Configurable Item](#).

Related Topics:

- [Configure a Cache](#)
- [Create Cache Service Configuration Parameters](#)
- [Configurable Services](#)

## Configure a Campaign Service

The Campaign service uses display counts to determine whether a Campaign has met its end goals. Each time an ad placeholder finds an ad to display as a result of a scenario action, the Campaign service updates the display count.

By default, the Campaign service does not update the display count in the database until an ad placeholder has found 10 ads to display as a result of one or more scenario actions. If the server crashes before the Campaign service flushes this display-count buffer to the database, you can lose display-count updates, up to the number of display counts that are in the buffer.

You can use the WebLogic Server Administration Console to determine the number of display counts that are stored in memory before the Campaign service updates the database:

To configure a Campaign Service:

1. In the Application Configuration Settings Resource tree, select Campaign Service.

**Note:** If Campaign Service does not appear in the Resource tree to the left, follow the instructions [Add or Remove a Configurable Item](#) to add it, and restart this process at step 1.

2. Fill in the fields to configure the Campaign Service. For detailed descriptions of the Campaign Service configuration fields, see [Campaign Service Configuration Parameters](#).
3. Click Update.

A message at the bottom of the window indicates that your changes have been applied.

Related Topics:

- [Overview of Campaigns](#)
- [Campaign Service Configuration Parameters](#)
- [Configurable Services](#)

## Create a New Document Connection Pool Service

As an administrator, you can create a new Document Connection Pool Service.

To create a new Document Connection Pool Service:

1. In the Application Configuration Settings Resource tree, select Document Connection Pool Service.
2. Fill in the fields to configure the document connection pool service. For detailed descriptions of the fields, see [Document Connection Pool Service Configuration Parameters](#).
3. Click Create.

Your new Document Connection Pool Service will appear in the Application Configuration Settings Resource tree under Document Connection Pool Service. To remove it from the tree, follow the instructions [Add or Remove a Configurable Item](#).

### Related Topics:

- [Configure a Document Connection Pool Service](#)
- [Document Connection Pool Service Configuration Parameters](#)
- [Configurable Services](#)

## Create a New Document Manager Service

As an administrator, you can create a new Document Manager Service.

To create a new Document Manager Service:

1. In the Application Configuration Settings Resource tree, select Document Manager.
2. Fill in the fields to create the document manager service. For detailed descriptions of the configuration setting fields, see [Document Manager Service Configuration Parameters](#).
3. Click Create.

A message at the bottom of the window indicates that your changes have been applied.

Related Topics:

- [Configure a Document Manager Service](#)
- [Document Manager Service Configuration Parameters](#)
- [Configurable Services](#)
- [Add or Remove a Configurable Item](#)

## Configure the Event Service (Add/Remove Event Listeners)

As an administrator, you can modify the configuration settings for Event Service, including adding or removing synchronous or asynchronous listener classes.

**Note:** Ensure that the listener class exists before trying add it.

To add a synchronous or asynchronous listener class:

1. In the Application Configuration Settings Resource tree, select Event Service.
2. Enter the class name in the Listener Class To Add field.
3. Click Update.
4. Ensure that you get a message in the bottom of the window stating that your changes have been applied.

**Note:** For detailed descriptions of the configuration setting fields, see [Event Service Configuration Parameters](#).

To remove a synchronous or asynchronous listener class:

1. In the Application Configuration Settings Resource tree, select Event Service.
2. Click on the appropriate class name from the displayed list of active listeners.
3. Click Update.
4. Ensure that you get a message in the bottom of the window stating that your changes have been applied.

Related Topics:

- [Event Service Configuration Parameters](#)
- [Configurable Services](#)
- [Add or Remove a Configurable Item](#)



## Configure a Mail Service

As an administrator, you can configure a Mail Service.

To configure a Mail Service:

1. In the Application Configuration Settings Resource tree, select Mail Service.

**Note:** If Mail Service does not appear in the Resource tree to the left, follow the instructions [Add or Remove a Configurable Item](#) to add it, and restart this process at step 1.

2. Fill in the SMTP Host Name field. For detailed descriptions of the SMTP Host Name field, see [Mail Service Configuration Parameters](#).

3. Click Update.

A message at the bottom of the window indicates that your changes have been applied.

Related Topics:

- [Mail Service Configuration Parameters](#)
- [Configurable Services](#)
- [Add or Remove a Configurable Item](#)

## Configure a Payment Client Service

WebLogic Portal includes a flexible payment service that lets you connect to a third-party payment product for authorizing and settling orders. The payment service itself currently allows credit card payments to be made.

To configure a Payment Client Service:

1. In the Application Configuration Settings Resource tree, select Payment Client Service.

**Note:** If Payment Service Client does not appear in the Resource tree to the left, follow the instructions [Add or Remove a Configurable Item](#) to add it, and restart this process at step 1.

2. Fill in the fields to configure the payment service. For detailed descriptions of the ad service configuration fields, see [Payment Service Client Configuration Parameters](#).
3. Click Update.

A message at the bottom of the window indicates that your changes have been applied.

Related Topics:

- [Payment Service Client Configuration Parameters](#)
- [class="text\\_normal\\_12px">Configurable Services](#)
- [Add or Remove a Configurable Item](#)

## Configure a Scenario Service

As an administrator, you can configure a Scenario Service.

To configure a scenario service:

1. In the Application Configuration Settings Resource tree, select Scenario Service.

**Note:** If the Scenario Service does not appear in the Resource tree to the left, follow the instructions [Add or Remove a Configurable Item](#) to add it, and restart this process at step 1.

2. Fill in the fields to configure the Scenario Service. For detailed descriptions of the scenario configuration fields, see [Scenario Service Configuration Parameters](#).

3. Click Update.

A message at the bottom of the window indicates that your changes have been applied.

Related Topics:

- [Scenario Service Configuration Parameters](#)
- [Configurable Services](#)
- [Add or Remove a Configurable Item](#)

## Configure a Tax Service Client

As an administrator, you can configure a Tax Service.

To configure a Tax Service Client:

1. In the Application Configuration Settings Resource tree, select Tax Service Client.

**Note:** If Tax Service Client does not appear in the Resource tree to the left, follow the instructions [Add or Remove a Configurable Item](#) to add it, and restart this process at step 1.

2. Fill in the fields to configure the tax service. For detailed descriptions of the tax configuration fields, see [Tax Service Configuration Parameters](#).

3. Click Update.

A message at the bottom of the window indicates that your changes have been applied.

Related Topics:

- [Tax Service Client Configuration Parameters](#)
- [Configurable Services](#)
- [Add or Remove a Configurable Item](#)

## Delete a Group

When you delete a group, you permanently delete the group and all of its children (sub-groups) from LDAP, and you will have to recreate all of the affected groups if you want to use them again. If you delete a group, it does not delete the users contained within it.

You can [remove the subgroup](#) from a group, and you can [move a group](#) within the group hierarchy to change its relationship to other groups. You can delete groups by two methods:

### Method 1:

1. In the User-Groups Resource tree, select the group you want to delete.
2. Right click, and select Delete.
3. Click OK.

### Method 2:

1. In the User Group Resource tree, select the group you want to delete.
2. Click the Delete This Group icon in the top right toolbar.
3. Click OK

### Related Topics:

- [Move a Group](#)
- [Create a Group](#)
- [Create a New User](#)

## Delete a User from the System

When you delete a user, you remove the user from LDAP, not just delete them from a group. As a result, if you delete the user from LDAP, the user will no longer be available in any other group or subgroup, and you will have to recreate the user if you need to use it again.

If you want to remove the user from a group but not remove the user from the entire system, see [Remove a User from a Group](#).

To delete a user from the system:

1. In the User Group Resource tree, select All Groups.
2. Type the user's name in the Login ID field and click Search. To select multiple users, click a letter in the Quick Search field. Selected users appear in the Select box.
3. Click the check box next to each user to select it, and click Select Users. Selected users now appear in the Edit box.
4. Click Delete Users from the System.

Related Topics:

- [Create a User](#)
- [Edit User Properties](#)
- [Find a User in the System](#)

## Remove Groups from a Delegated Administration Role

If you no longer want delegated administration rights to be available for a group of users, you can simply remove Delegated Administration privileges for the user or group from the Delegated Administration role.

To remove groups from a Delegated Administration role:

1. In the User Group Resource tree, select the group whose privileges you want to remove from a role.
2. Selected the Delegated Administration tab.
3. Use the drop-down menu in the Delegated Administration editor to select a role.
4. If you want to remove the user or group from more than one role, repeat Step 3 until all of the roles are listed in the Can Manage box.
5. Check the box to the left of each role.
6. Click Remove.

## Related Topics

- [Assign Users \(or Groups\) to a Delegated Administration Role](#)
- [Remove Portal Resources from a Delegated Administration Role](#)
- [Remove Interaction Management Resources from a Delegated Administration Role](#)
- [Remove Content Management Resources from a Delegated Administration Role](#)

## Change a User's Password

If you have the appropriate Delegated Administration rights, you can change any user or group of user's password. Make sure that your user makes note of the new password because once the password is in place there is no way for you to find out what it is. If a user forgets a password, an administrator will have to change it.

### **To change a user's password:**

1. [Find](#) the user whose password you want to change.
2. Double-click the user name to access the User Editor Pane.
3. Click the Change Login Password tab.
4. Enter the new password in both input fields.
5. Click Save.

### **Related Topics:**

- [Create a New User](#)
- [Find a User](#)
- [Add a User to a Group](#)



## Remove Delegated Administration of Content Management Resources

As an administrator, you can rescind the rights of a Delegated Administration role to manage Content Management resources.

To remove Content Management resources from a Delegated Administration role:

1. In the Browse & Edit Resource tree, select the Content Management resource you want to remove from a role.
2. Selected the Delegated Administration tab in the Editor pane, if it is not already open.
3. Use the drop-down menu in the Delegated Administration editor to select a role. (The role appears in the Can Manage box.)
4. If you want to remove the Content Management resource from more than one role, repeat Step 3 until all of the roles are listed in the Can Manage box.
5. Check the box to the left of each role.
6. Click Remove.

### Related Topics:

- [Overview of Role Hierarchy](#)
- [Overview of Delegated Administration](#)

## Move a Role - Change a Role's Position in the Role Hierarchy

If you want to make an existing role the child of another role, you can simply move it in the role hierarchy. For example, a role that is at the top level can be moved to become a subrole of another role.

When you move a role, the subroles associated with it are moved with it. Moving a role is a process of cutting it from one parent role and pasting it into a new parent role.

To move a role from one parent to another:

1. In the Delegated Administration Resource tree, select the role you want to move
2. Right click on the role and select Move/Cut or click the Move/Cut Role icon in the top right toolbar in the Editor pane.
3. Select a new parent role in the Delegated Administration Resource tree.
4. Right click on the new parent role, and select Paste the role you selected to move/cut.

Related Topics:

- [Overview of Delegated Administration Role Hierarchy](#)
- [Create a New Delegated Administration Role](#)
- [Delete a Delegated Administrative Role](#)

## Delete a Delegated Administration Role

When you delete a Delegated Administration role, the child roles associated with it are also deleted. If there are references ([security policies](#)) associated with a role you are trying to delete, a warning will be displayed. You will need to remove all such references before the system will allow you to delete the role.

A Delegated Administration role can be deleted when no security policies are associated with it. Only a user in the global "Admin" role is allowed to delete roles with associated security policies.

To delete a Delegated Administration role:

1. In the Delegated Administration Resource tree, select the role want to delete.
2. Right click, and select Delete Role, or click the Delete Role icon in the top right toolbar in the Editor pane.
3. Click OK.

Related Topics:

- [Create a Delegated Administration Role](#)
- [Overview of Delegated Administration](#)

## Delegated Administration Role Policy Reference Summary

You can view summary information about a Delegated Administration role to learn how the role is being used and what access it has for specific portal resources. This is useful because before you can delete a Delegated Administration role, you have to remove the access it has to specific portal resources.

To view a Delegated Administration role's policy reference summary information:

1. In the Delegated Administration Roles Resource tree, select a role.
2. In the Editor pane, click the Policy Reference Summary tab.
3. There you can view the information for the role's:
  - Web Application name
  - Editor Name
  - Number of References

### Related Topics:

- [Add Users to a Delegated Administration Role](#)
- [Add Groups to a Delegated Administration Role](#)
- [Remove Users from a Delegated Administration Role](#)
- [Remove Groups from a Delegated Administration Role](#)

## Rename a Delegated Administration Role

You can change the name of both parent roles and child roles. If there are references ([security policies](#)) associated with a role you are trying to rename, a warning will be displayed. You will need to remove all such references before the system will allow you to rename the role.

To rename a Delegated Administration role:

1. In the Delegated Administration Resource tree, select the role whose name you want to change.
2. Right click, and select Rename Role, or click the Rename Role icon in the top right toolbar in the Editor pane.
3. Type the new name in the pop-up window, and click OK.

Related Topics:

- [Create A Delegated Administration Role](#)
- [Delete a Delegated Administration Role](#)
- [Overview of Delegated Administration Role Hierarchy](#)

## Visitor Entitlement Role Policy Reference Summary

You can view summary information about a Visitor Entitlement role to learn how the role is being used and what access it has for specific portal resources. This is useful because before you can delete a Visitor Entitlement role, you have to remove the access it has to specific portal resources.

To view a Visitor Entitlement role's policy reference summary information:

1. In the Visitor Entitlement Resource tree, select a role.
2. In the Editor pane, click the Policy Reference Summary tab.
3. There you can view the information for the role's:
  - Web Application name
  - Editor Name
  - Number of References

### Related Topics:

- [Add Users to a Visitor Role](#)
- [Add Groups to a Visitor Role](#)
- [Create a Visitor Role](#)
- [Assign a Visitor Entitlement Role to a Delegated Administration Role](#)
- [Remove a Visitor Entitlement Role from a Delegated Administration Role](#)
- [Delete a Visitor Role](#)
- [Edit Visitor Role Expressions](#)
- [Modify Visitor Role Properties](#)
- [Rename a Visitor Role](#)

## Duplicate or Modify a Campaign

As an administrator, you can duplicate an existing Campaign, then modify the new Campaign. You can also modify an existing Campaign, including changing the start or stop date or modifying the query user name.

From the Campaigns tab in the Editor pane, you can:

- [Duplicate a Campaign](#)
- [Activate a Campaign](#)
- [Deactivate a Campaign](#)
- [Change the start and/or stop date](#)
- [Update the query user name](#)
- [Reset the Campaign properties](#)

To duplicate a Campaign:

1. In the Campaigns Resource tree, select the Campaign you want to duplicate.
2. In the Editor pane, under the Campaigns tab, click Duplicate.
3. In the pop-up window, enter the name for the new Campaign. Click OK.

The new Campaign appears in the Campaigns Resource tree.

To activate a Campaign:

1. In the Campaigns Resource tree, select the Campaign you want to activate.
2. In the Editor pane, under the Campaigns tab, click on the active button.
3. Click Save Changes.

The Campaign is now active.

To deactivate a Campaign:

1. In the Campaigns Resource tree, select the Campaign you want to deactivate.
2. In the Editor pane, under the Campaigns tab, click on the not active button.
3. Click Save Changes.

The Campaign is no longer active. The targeted user will see default content rather than specific Campaign content in the Campaign's Placeholder.

To change a Campaign start and/or stop date:

1. In the Campaigns Resource tree, select the Campaign for which you want to modify the start or stop date.
2. In the Editor pane, under the Campaigns tab, click the calendar icon next to the Start Date or Stop Date field.
3. Use the month and year drop-down menus to select the month and year. You can also use the left and right arrows at the top of the calendar window to select the month and year.
4. Use the numbers in the date pane to select a day.
5. Use the up and down arrows in the time pane to select a specific time of day. You must click on each field in the time pane before you can modify it.
6. Click Save Changes.

The start and/or stop date have been modified for the Campaign.

To update the query user name:

1. In the Campaigns Resource tree, select the Campaign for which you want to change the query user name.
2. In the Editor pane under the Campaigns tab, go to the Query User Name field and click Update.
3. In the pop-up window, enter the new query user name. Click Save Changes.

The query user name has been modified for the Campaign.

To reset the Campaign settings:

1. In the Campaigns Resource tree, select the Campaign you want to reset.
2. In the Editor pane under the Campaigns tab, click on Reset Campaign.
3. In the pop-up window, select which component of the Campaign you want to clean up or reset. You can choose to reset the following aspects of the Campaign:
  - All
  - Ad Buckets
  - Ad Counts
  - End States
  - Mail Batches
4. Click Reset Campaign.

The Campaign has been reset.

**Note:** To cancel resetting the Campaign, click Cancel.

Related Topics:



- [Modify an Email Action](#)
- [Modify a Content Action](#)
- [Modify a Discount Action](#)
- [Preview a Modified Campaign Action](#)
- [Assign Interaction Management Resources to a Delegated Administration Role](#)
- [Remove Interaction Management Resources from a Delegated Administration Role](#)

## Modify a Content Action

As an administrator, you can modify a content action within a Campaign to change the content query, change the pPlaceholder, change the conditions, and more.

To modify a content action:

1. In the Campaigns Resource tree, select the Campaign and content action you want to modify.
2. In the Editor pane, under the Campaigns tab, you can specify:
  - Whether any or all conditions apply
  - If the visitor has predefined characteristics
  - If the visitor is in a particular user segment
  - The visitor's HTTP session
  - The visitor's HTTP request
  - If any of the following events occurred:
    - UserRegistrationEvent
    - AddToCartEvent
    - ClickContentEvent
    - DisplayCampaignEvent
    - PurchaseCartEvent
    - RemoveFromCartEvent
    - SessionLoginEvent
    - ClickProductEvent
    - ClickCampaignEvent
  - The event characteristics
  - The current date
  - The current date is after a particular date
  - The current date and time is after a particular date and time
  - The current time is between two particular times
  - The current date is between two particular dates
  - The current date and time is between two particular dates and times
  - A random number between 1 and 100 that falls between 1 and 100 (this defines 100 percent of the qualifying visitors)
3. After you have modified the content action characteristics, you can then modify the content action further by specifying the specific content to retrieve for the visitor and the specific placeholder for it. To modify the retrieved content, click on the bracketed text within the Then box in the Editor pane.

Related Topics:

- [Modify an Email Action](#)
- [Modify a Discount Action](#)

- [Preview a Modified Campaign Action](#)
- [Duplicate or Modify a Campaign](#)

## Modify a Discount Action

As an administrator, you can modify a discount action within a Campaign to change the action conditions, descriptions, User Segments, and more.

To modify a discount action:

1. In the Campaigns Resource tree, select the Campaign and discount action you want to modify.
2. In the Editor pane, under the Campaigns tab, you can specify:
  - Whether any or all conditions apply
  - If the visitor is in a particular User Segment
  - If the visitor has predefined characteristics
  - The visitor's HTTP session
  - The visitor's HTTP request
  - If any of the following events occurred:
    - UserRegistrationEvent
    - AddToCartEvent
    - ClickContentEvent
    - DisplayCampaignEvent
    - PurchaseCartEvent
    - RemoveFromCartEvent
    - SessionLoginEvent
    - ClickProductEvent
    - ClickCampaignEvent
  - The event characteristics
  - The current date
  - The current date is after a particular date
  - The current date and time is after a particular date and time
  - The current time is between two particular times
  - The current date is between two particular dates
  - The current date and time is between two particular dates and times
  - A random number between 1 and 100 that falls between 1 and 100 (this defines 100 percent of the qualifying visitors)
3. After you have modified the discount action characteristics, you can then modify the discount action further by specifying the specific discount to retrieve for the visitor. To modify the retrieved discount for the scenario, click on the bracketed text within the Then box in the Editor pane.

Related Topics:

- [Modify an Email Action](#)
- [Modify a Content Action](#)

- [Preview a Modified Campaign Action](#)
- [Duplicate or Modify a Campaign](#)

## Modify an Email Action

As an administrator, you can modify an email action within a Campaign to change the action conditions, descriptions, User Segments, and more.

To modify an email action:

1. In the Campaigns Resource tree, select the Campaign and email action you want to modify.
2. In the Editor pane, under the Campaigns tab, you can specify:
  - Whether any or all conditions apply
  - If the visitor is in a particular User Segments
  - If the visitor has predefined characteristics
  - The visitor's HTTP session
  - The visitor's HTTP request
  - If any of the following events occurred:
    - UserRegistrationEvent
    - AddToCartEvent
    - ClickContentEvent
    - DisplayCampaignEvent
    - PurchaseCartEvent
    - RemoveFromCartEvent
    - SessionLoginEvent
    - ClickProductEvent
    - ClickCampaignEvent
  - The event characteristics
  - The current date
  - The current date is after a particular date
  - The current date and time is after a particular date and time
  - The current time is between two particular times
  - The current date is between two particular dates
  - The current date and time is between two particular dates and times
  - A random number between 1 and 100 that falls between 1 and 100 (this defines 100 percent of the qualifying visitors)
3. After you have modified the email action characteristics, you can then modify the email action further by specifying the:
  - Email location
  - Email subject
  - Email sent by address

To modify these characteristics, click on the bracketed text within the Then box in the Editor pane.

## Related Topics:

- [Modify an Content Action](#)
- [Modify a Discount Action](#)
- [Preview a Modified Campaign Action](#)
- [Duplicate or Modify a Campaign](#)

## Preview a Modified Campaign Action

As an administrator, you can preview a modified action within a campaign. These campaign actions include:

- **Content**
- **Email**
- **Discount**

Within the WebLogic Administration Portal, you can modify these actions by changing the conditions or content queries of these actions. After changing an action, you can preview it to verify the change is correct.

To preview a modified campaign action:

1. In the Campaigns Resource tree, select the Campaign and subsequent action you want to modify.
2. Modify the [discount](#), [email](#), or [content](#) action accordingly. Save your changes.
3. Click Show Previews.

**Note:** The modified content does not show in the preview at this time. Continue with step 4.

4. Close the Campaigns Resource tree, then re-expand it.
5. In the Campaigns Resource tree, select the Campaign and subsequent action you want to preview.
6. In the Editor pane, click Show Previews.

The modified content can now be previewed.

**Note:** To close the preview, click Hide Previews.

Related Topics:

- [Modify an Email Action](#)
- [Modify a Discount Action](#)
- [Modify a Content Action](#)
- [Duplicate or Modify a Campaign](#)



## View Content, Type, or Repository

You can choose to view content, types, or repositories from within the Content Management administration tool.

To view either content or type for a repository:

1. In the Resource tree in the View field, select Content, Type, or Repository from the pull-down menu.
2. The Resource tree then displays the Content List, the Type List, or the Repository Resource tree.

### Related Topics:

- [Overview of Content Management](#)
- [Overview of Managing Content](#)
- [Overview of Managing Repositories](#)
- [Overview of Managing Types](#)

## Add a Type

Types, also called schemas, allow you to define the data that a content item can contain.

To add a type:

1. In the Type List Resource tree, select a repository to get a list of available types.
2. Right click on the repository.
3. Select Add Type from the pop-up menu.
4. In the pop-up window, enter the type name you are adding to the repository and either press Return or click OK.

**Or**

1. Select the appropriate repository and right click on List Types to get a list of available types.
2. Click Add Type.
3. In the pop-up window, enter the type name you are adding to the repository and either press Return or click OK.

Related Topics:

- [Copy a Type](#)
- [Delete a Type](#)
- [Edit a Type](#)
- [Rename a Type](#)
- [Add Properties to a Type](#)

## Copy a Type

You can copy an existing type then edit it and save it as a new type. This is also referred to as "save as."

To copy a type in the repository:

1. In the Type List Resource tree, click on the type you want to copy.
2. In the Editor pane, click on the Save As icon. You can also right click the type in the Type List Resource tree and select Save As from the pop-up menu. An Explorer User Prompt window appears.
3. In the Explorer User Prompt window, enter in the new name for the copied type.
4. Press Return or click OK.

### Related Topics:

- [Add a Type](#)
- [Delete a Type](#)
- [Edit a Type](#)
- [Rename a Type](#)
- [Add Properties to a Type](#)

## Delete a Content Type

WebLogic Administration Portal enables you to delete a content type from your content repository.

To delete a type:

1. In the Type List Resource tree, right click on the type you want to delete.
2. Select Delete from the pop-up menu.
3. A pop-up window displays asking you to confirm that you want to delete the content type. If you want to proceed, click OK.

The type should no longer appear in the Resource tree.

Related Topics:

- [Add a Type](#)
- [Copy a Type](#)
- [Edit a Type](#)
- [Rename a Type](#)
- [Add Properties to a Type](#)

## Edit a Type

As an administrator, you can change the type definitions, including the type name, data type, default values, and more.

To edit a type in the repository:

1. In the Type List Resource tree, select a type to edit.
2. In the Editor pane, modify the appropriate type definitions. The choices are:
  - Changing the type name
  - Specifying whether the type is required, read only, or primary property.
  - Changing the data type
  - Changing the choice type
  - Changing the default value(s)
  - Designating the type as explicit
3. Click Update to apply the changes.

**Note:** If the type has content associated with it, you will not be able to edit that type.

Related Topics:

- [Copy a Type](#)
- [Delete a Type](#)
- [Add a Type](#)
- [Rename a Type](#)
- [Add Properties to a Type](#)

## Rename a Type

As an administrator, you can rename a type.

To rename a type in the repository:

1. In the Type List Resource tree, click on the type you want to rename.
2. In the Editor pane, click on the Rename icon in the gray window. An Explorer User Prompt window appears.
3. In the Explorer User Prompt window, enter in the new name for the type.
4. Press Return or click OK.

### Related Topics:

- [Copy a Type](#)
- [Delete a Type](#)
- [Edit a Type](#)
- [Add a Type](#)
- [Add Properties to a Type](#)

## Add Properties to a Type

As an administrator, you can add property definitions to a type.

To add properties to a type:

1. In the Type List Resource tree, click on the type to which you want to add properties.
2. In the Editor pane, click on the Add Property icon or click Add Property. An Add Property window appears.
3. Give the added property a name.
4. Designate the property as Required and/or Read-Only by checking the appropriate box.
5. Designate the property as Primary by checking the Primary box.
6. Select one of the following as the Data Type:
  - String
  - Integer
  - Boolean
  - Double
  - Calendar
  - Binary
7. Select one of the following as the Choice Type:
  - Single Unrestricted
  - Single Restricted
  - Multiple Unrestricted
  - Multiple Restricted
8. Press Return or click OK.

### Related Topics:

- [Copy a Type](#)
- [Delete a Type](#)
- [Edit a Type](#)
- [Rename a Type](#)
- [Add a Type](#)

## Lock a Portlet's Position on a Page

When a portlet is locked on a page, a user or unauthorized administrator cannot change its position.

To lock a portlet on a page:

1. In the Portal Resource tree, expand the Portal folder to show all of your portals.
2. Select the Page that contains the portlet you want to lock.
3. Select the Position Page Contents tab.
4. Click the Lock Placeholder checkbox to lock the portlet's Placeholder.
5. Click Save Changes.

### Related Topics:

- [Position Portlets on a Page](#)
- [Edit Portlet Preferences](#)
- [Manage Portlets in a Portlet Category](#)
- [Modify Page Properties](#)
- [Set Entitlements on Portal Resources](#)
- [Assign Delegated Administration to Portal Resources](#)



## Overview of Portlet Categories

Portlet categories provide for the classification of portlets, which is useful when organizing a large collection of portlets into something more meaningful. The portlet categories are similar to other hierarchical structures in that parent “folders” can contain child folders and/or portlets.

### Related Topics:

- [Create Portlet Categories](#)
- [Modify Portlet Categories](#)
- [Duplicate a Portlet](#)
- [Position Portlets on a Page](#)

## Modify Portlet Category Properties

A portlet category's properties are all of the features and elements that make up the category. As a portal administrator, you can modify some of these properties.

To modify portlet category properties:

1. In the Portal Resource tree, go to Library -> Portlet Categories.
2. Expand Portlet Categories, and select a category.
3. Select the Portlet Category Properties tab in the Editor pane.
4. Update the information in the fields. Use the table below for guidance.

For this Field:	Enter This Information:
For the Locale	Select a default language for your portlet category from the drop-down menu.
Title	A new title for the portlet category.
Description	A new description of your category.

5. Click Save Changes.

Related Topics:

- [Manage Portlets in a Portlet Category](#)
- [Add a Portlet to Page](#)
- [Create a Portlet Category](#)

## Modify Theme Properties

A theme's properties are all of the features and elements that make up the theme. As a portal administrator, you can modify some of these properties.

To modify theme properties:

1. In the Portal Resource tree, go to Library -> Themes.
2. Select a them from the Available Themes list.
3. Update the information in the fields. Use the table below for guidance.

For this Field:	Enter This Information:
For the Locale	Select a default language for your theme from the drop-down menu.
Title	A new title for the theme.
Description	A new description of theme.

5. Click Save Changes.

## Related Topics

- [Overview of Themes](#)
- [Assign a Theme to a Portal Element](#)
- [Overview of Portal Resources](#)
- [How Do I Localize My Portal?](#)
- [Manage Portlet Properties](#)

## Overview of Portals

The word portal is defined as a doorway, an entrance, or a gateway. Similarly, a web portal acts as an entrance or a gateway to content and applications that users most often access.

Portals provide the following benefits to the user:

- **Aggregation** – The user can go to a single place for all content and applications.
- **Customization** – The preferences for a user determine how the portal looks and feels.
- **Personalization** – The user can get content that is specific to their interests and needs.
- **Organization** – The user can arrange the content and applications to make better sense of the information.
- **Integration** – The user can work with multiple applications and content sources in a unified fashion.

Portals typically include the following features and benefits:

- **Search** – Enterprise and web-based search facilities
- **Content Management** – Creation, management, and delivery of content
- **Content Repurposing** – Including content from multiple disparate data sources

Portals optionally include the following features and benefits:

- **Workflow** – Business process management
- **Single Sign-On** – Allows users to log on once for all applications within the portal

Related Topics:

- [Overview of Delegated Administration](#)
- [Overview of Entitlements](#)
- [Overview of Interaction Management](#)
- [Overview of Content](#)

## Remove Visitor Entitlements from Portal Resources

If you no longer want Visitor Entitlement rights to be available for a particular portal resource, you can remove the resource from the Visitor Entitlement role.

### **To remove Visitor Entitlements from portal resources:**

1. In the Portal Resource tree, select the portal resource from which you want to remove Visitor Entitlements.
2. Click the Entitlements tab in the Editor pane.
3. Click Remove Selected Roles.

### Related Topics:

- [Set Visitor Entitlements on Portal Resources](#)
- [Overview of Visitor Entitlements](#)
- [Overview Of Delegated Administration](#)

## Make Portal Resources Available in the Weblogic Administration Portal

Portals and portal resources are most often developed elsewhere and made available for you to manage in the WebLogic Administration Portal. In order for you to see the resource in the Resource tree and be able to access its properties, it must first be "made available" to the WebLogic Administration Portal and then you must be given [Delegated Administration](#) rights to see it.

To make portal resources available in the WebLogic Administration Portal:

1. In the Portal Management tools, use the pull-down list above the Portal Resource tree to select a web application.

**Note:** If you do not know which web application to choose, consult with the developer who created the portal you are trying to expose.

2. Select Portal Resources in the Portal Resource tree.
3. Click Create New Portal in the Editor pane.
4. Fill in the web application properties. Use the table below for guidance.
5. Click Create Portal. Look for the new portal and portal resources in the Portal Resource tree.

For This Field:	Enter This Information:
Choose a Portal Template from which to create your new portal	From the pull-down menu, select the portal that you want to expose in the WebLogic Administration Portal.
Enter a Name for this Portal	Enter the name of the portal as you want it to appear in the Resource tree.
Enter a Description for this Portal	Enter a description of the portal.
Enter a partial URL for this Portal	Enter the name you want used to access the portal. (Replace the boldface item in the example.)
Enter a partial URL for this Portal's Desktop	This allows you to further specify the URL. (replace the boldface item in the example)
Enter an (optional) Portal URI	This allows you to specify a JSP. (replace the boldface item in the example.)

## Delete a Portal Resource from the Portal Resource Library

As a portal resource librarian, you can delete portal resources from the portal resource library.

To delete a portal resource:

1. In the Portal Resource tree, select the resource you want to copy from the library.
2. Right Click, and select Delete.

### Related Topics

- [Create a Desktop](#)
- [Create a Book](#)
- [Create a Page](#)
- [Duplicate a Portlet](#)

## Add or Remove a Configurable Item

You can configure your portal by adding or removing services that keep information in cache/memory during a server session. Any changes you make to these configuration settings require you to redeploy your application.

The configurable items that you add or remove will be added or removed from the Application Configuration Settings Resource tree to the left of the screen. For a description of the configurable items available for addition or removal, see [Configurable Services](#).

### **To add or remove a service:**

1. Check the box next to a service to add it; uncheck the box to remove the item.
2. Click Update to apply your changes.
3. Redeploy your application to activate the changes.

### **Related Topics:**

- [Overview of Portal Administration](#)
- [Configurable Services](#)



## Content Provider Configuration Parameters

Field Name	Description
Content Provider	Specifies the name of the class that generates the HTML elements that the browser requires to display an ad of this MIME type. If you write your own class, it must implement the <code>com.bea.commerce.platform.ad.adContentProvider</code> interface
Properties	Specifies configuration properties for the content provider class. Default behavior: the <code>AdContentProvider</code> uses the <code>com.bea.p13n.ad.ContentProviders.getContentProviderProperties(String mimeType)</code> method.

## Ad Service Configuration Parameters

Field Name	Description
Display Flush Size	Determines the number of display counts that are stored in memory before updating the database. The Campaign Service uses display counts to determine whether a Campaign has met its end goals. Each time an ad placeholder displays an ad as a result of a scenario action, the Campaign Service updates the display count. With the default setting of 10, the Campaign Service does not update the display count in the database until 10 ads have displayed as a result of one or more scenario actions placing queries in ad placeholders. For sites with high traffic, increase this number to a range of 50 to 100. Minimum value: 1.
Rendering Class	Specifies the class that generates the HTML elements that the browser requires to display an ad through the <ad:adTarget> JSP tag. WebLogic Portal provides only one class.
Event Tracker Class	Determines the class that the adTarget tag uses to access the Event Service. The WebLogic Portal installer configures this property. If you write your own class, it must implement the com.bea.p13n.ad.AdEventTracker interface. If you use the adTarget tag as part of Campaigns, use this attribute to specify the com.bea.Campaign.AdTracking class. Default behavior: Uses com.bea.p13n.ad.AdEventTrackerBase.
Ad Clickthru URI	Specifies the name of the servlet to which the AdService forwards clickthroughs on ads. The name must correspond to a servlet mapping of an AdClickThruServlet, which you create in the Web application's web.xml file. Default behavior: the AdService forwards clickthrough to a servlet identified as AdClickThru.
Show Doc URI	Specifies the name of the servlet that the AdService uses to display ads. The name must correspond to a servlet mapping of a ShowDoc servlet, which you create in the Web application's web.xml file.

## Overview of Configurable Services

Service Name	Description
Ad Service	Configures the content rendering and content event services to control content placeholders. Provides content rendering, click-through, and impression event tracking support for enabling content display.
Behavior Tracking Service	Configures how and which behavior events will be persisted for analytics. Persists user-driven actions and events to enable analytics tools to track user behavior.
Cache Manager	Configures the portal caches, which are used by the other services to cache data; includes the ability to flush cached data. Provides support for caching generated data in a cluster-aware and managed system; used internally by many other services in the portal product.
Campaign Service	Configures the interaction management services to control how they execute. Interaction management services for enabling advanced personalization by reacting to user events to conditionally display content, send emails, and offer discounts.
DocumentConnectionPool	Configures a 7.0 document service provider implementation to enable access through portal. Deprecated. Content management system access services for searching for and retrieving content.
DocumentManager	Configures a 7.0 DocumentManager.
Event Service	Configures EvenListeners to receive user events from portal. Generic application event service for passing events to listeners for processing; used by behavior tracking and interaction management.

<b>Mail Service</b>	<b>Configures how email is sent from Campaigns. Provides support for creating batches of email messages and sending email from portal.</b>
<b>Payment Service Client</b>	<b>Configures how the sample commerce payment client code will contact a payment service. Configuration for the sample tax and payment client code.</b>
<b>Scenario Service</b>	<b>Interaction management services for enabling advanced personalization by reacting to user events to conditionally display content, send emails, and offer discounts.</b>
<b>Tax Service Client</b>	<b>Configures how the sample commerce tax client code will contact a tax service.</b>

## Behavior Tracking Service Configuration Parameters

Field Name	Description
Data Source JNDI Name	Specifies the JNDI name of the BehaviorTracking EJB.
Maximum Buffer Size	Sets the maximum number of entries (events) for the buffer. Default value: 100 events.
Buffer Sweep Interval	Determines how often the events buffer is checked to determine whether the events in the buffer should be persisted to the database. Two conditions will trigger buffer persistence: 1) if the maximum buffer size has been reached or 2) if the maximum time allowed in the buffer (sweep max time) has been exceeded. (Note: events are added to the buffer as soon as they are received - this has nothing to do with the buffer sweep interval.)
Buffer Sweep Maximum Time	Sets the maximum time in seconds before the buffer's contents are either persisted to the database (if the event type is listed in Persisted Event Types) or flushed from memory. In your development environment, start with a set of baseline values for Buffer Sweep Interval and Buffer Sweep Maximum Time, and try higher or lower values while testing expected, peak site usage with your Web application. A buffer sweep should be performed often enough that writing to the database is not too time consuming, but not so frequent that the operation is wasteful. Default value: 120 seconds.
Persisted Event Types	If listed, events of this type are persisted to the database. For facilitating offline processing of customer interactions with a Web site, Behavior Tracking events are designed to be persisted to a table in the database, called the EVENT table. Part of the process of recording data from Behavior Tracking events is creating an XML representation of the data, which is stored in the xml_definition column of the EVENT table. You can persist events in an alternate location and table structure as requirements dictate.

## Create Cache Service Configuration Parameters

Field Name	Description
Cache Name	The name of the new cache.
Enabled	Check this item to enable a cache. When not checked, the cache is not populated or used for retrieval. Clearing this check box also flushes the cache and causes the fetch, add, and remove methods to do nothing.
Time to Live	Specifies in milliseconds how long an item can live in the cache before it is automatically expired.
Maximum Number of Entries	<p>Determines the maximum number of items that the cache maintains. This is an integer number; no commas or decimals are allowed. If a cache already contains the maximum number of entries and a service tries to add an item, the cache determines whether the item already exists in the cache. Then it does one of the following:</p> <ul style="list-style-type: none"><li>• If the item already exists, the cache replaces the entry.</li><li>• If the item does not already exist, it is added to the cache.</li></ul> <p>If the cache is at the maximum capacity, then the least recently used element is removed to accommodate the new element.</p>

## Configure a Cache

When you configure a cache, you modify its parameters to change its behavior or capability. For example, you can set up a cache to hold only the last 10,000 entries and set the time they can remain in the cache. You can also flush the cache so that all new requests for information come from the database.

To configure a cache:

1. In the Application Configuration Settings Resource tree, select Cache Manager -> specific cache you want to configure.

**Note:** If the specific cache does not appear in the Resource tree to the left, click Add/Remove Configurable Item in the Resource tree to see if it has been created. If it appears in the Configurable Items list, follow the instructions [Add or Remove a Configurable Item](#) to add it to the Resource Tree, and restart this process with step 1. If it has not been created, follow the instructions to [Create a Cache](#), and restart this process at step 1.

2. Fill in the fields with new configuration settings. For detailed descriptions of the configuration setting fields, see [Cache Manager Configuration Parameters](#).
3. Click Update.

A message at the bottom of the window indicates that your changes have been applied.

Related Topics:

- [Create a Cache](#)
- [Configure Cache Service Configuration Parameters](#)
- [Configurable Services](#)
- [Add or Remove a Configurable Item](#)

## Campaign Service Configuration Parameters

Field Name	Description
Goal Check Time	Configures a cache that Campaigns use to determine whether they have reached their goals. If you want to disable the cache, provide a value of 0 or less. The default value is 300000 milliseconds (5 minutes).
Base Directory for Email Browsing	Specifies the directory within a Web application that contains Campaign emails. Default directory: Campaigns/emails.
Email URI Extensions	Specifies the filename extensions for files within the EmailBrowseBaseDir that are to be considered Campaign emails. Enter one per line.
JNDI Name of Campaign Service	Specifies the JNDI name of the CampaignService EJB. The default value is <code>\${APPNAME}.BEA_Campaign.CampaignService</code> .
Default From Email Address	Specifies the default address that receives any replies from email that the Campaign sends. In a standard mail header, this is the From address. Each Campaign scenario can specify its own From address. A scenario-provided From address overrides this DefaultFromAddress property. Default value is <code>acme@acme.com</code> .
Email Address Property Name	Specifies the name of the property that contains customer email addresses. Properties and property sets are stored in the RDBMS repository. You use the E-Business Control Center to create and manage them. Default value is <code>email</code> .
Property Set Name Containing Email Address Property	Specifies the name of the property set that contains customer email properties. Default value is <code>Customer Properties</code> .
Email Opt In Property Name	Specifies the name of a property that contains a customer's Campaign-related email preferences. Default value is <code>Email_Opt_In</code> .
Property Set Name Containing Opt In Property	Specifies the name of the property set that contains the OptIn property. Default value is <code>Demographics</code> .



## Document Connection Pool Service Configuration Parameters

Field	Description
Document Connection Pool Name	The name you give a new Document Connection Pool Service. This field is available when you create a new Document Connection Pool.
Driver Name	Specifies the name of the driver that DocumentConnectionPool uses to connect to the content management system. Default behavior: uses com.bea.p13n.content.document.jdbc.Driver.
Initial Capacity of Pool	Specifies the number of connections to the content management system that the connection pool establishes when you start the Web application. Minimum value is 0.
Capacity Increment	Determines an algorithm for expanding the number of connections in the pool. When the number of requests exceeds the current number of connections, the connection pool adds as many connections as this CapacityIncrement attribute specifies (up to the maximum capacity). Default value is 0. Minimum value is 0.
Maximum Capacity of Pool	Specifies the maximum number of connections to the content management system that the connection pool maintains. After the connection pool reaches this maximum, additional requests to connect to the content management system wait in a queue until a connection is available. Minimum value is 1.
Is Shrinking Enabled?	If checked, the connection pool decreases the number of available connections if they are not all being used. Default behavior: shrinking is not enabled.
Login Timeout (seconds)	Specifies the number of seconds that the pool waits for a connection to become available. If it is unable to make a connection after this time expires, the pool returns an exception to the object that requested the connection. Default: 0. 0 or less means wait indefinitely until a connection becomes available.
JDBC URL	Specifies the URL that the DocumentManager EJB uses to access the connection pool.

<b>JDBC Properties</b>	<p><b>Provides parameters (properties) to configure the driver. Enter properties one per line in the format of name=value. For example:</b></p> <p><b>schemaXML=d:/bea/weblogic700/samples/portal/p13nDomain/dmsBase/doc-schemas</b> <b>docBase=d:/bea/weblogic700/samples/portal/p13nDomain/dmsBase</b> <b>documentProvider=com.bea.p13n.content.document.ref.</b> <b>RefDocumentProvider</b> <b>jdbc.dataSource=weblogic.jdbc.pool.commercePool.</b></p>
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## Configure an Existing Document Connection Pool Service

As an administrator, you can configure an existing Document Connection Pool Service.

To configure an existing Document Connection Pool Service:

1. In the Application Configuration Settings Resource tree, select Document Connection Pool Service-> specific service you want to configure.

**Note:** If the specific document connection pool service does not appear in the Resource tree to the left, click Add/Remove Configurable Item in the Resource tree to see if it has been created. If it appears in the Configurable Items list, follow the instructions [Add or Remove a Configurable Item](#) to add it to the Resource Tree, and restart this process with step 1. If it has not been created, follow the instructions to [Create a Document Connection Pool Service](#), and restart this process at step 1.

2. Fill in the fields to configure the Document Connection Pool Service. For detailed descriptions of the configuration fields, see [Document Connection Pool Service Configuration Parameters](#).
3. Click Update.

A message at the bottom of the window indicates that your changes have been applied.

### Related Topics:

- [Create a Document Connection Pool Service](#)
- [Document Connection Pool Service Configuration Parameters](#)
- [Configurable Services](#)

## Document Manager Service Configuration Parameters

Field Name	Description
Document Connection Pool Name	Specifies the name of the DocumentConnectionPool that the DocumentManager EJB uses. Default behavior: DocumentManager checks the DocumentManager EJB deployment descriptor for this setting.
Property Case	Determines whether the DocumentManager searches for document properties (metadata) that are in upper case, lower case, or whether the lookups are case insensitive. For example, if you specify upper, then document queries ignore lower-case words. Use one of the following values: upper, lower, or none. Default behavior: Lookups are case insensitive (none).
Metadata Caching Enabled?	If checked, DocumentManager caches the metadata that it retrieves as part of a document search. Default behavior: enabled.
Metadata Cache Name	Specifies the name of the cache that DocumentManager uses for metadata. Use this option if you configure a new cache for storing metadata. Default behavior: DocumentManager uses the preconfigured documentMetadataCache. You can modify the configuration of this cache, or you can create a new cache.
Is User ID in the Cache Key?	If checked, the ID of each user is included in the keys for data items in the cache. Default behavior: not enabled.
Content Caching Enabled?	If checked, DocumentManager caches the documents that it retrieves. Default behavior: DocumentManager caches documents.

<b>Content Cache Name</b>	<b>Specifies the name of the cache that DocumentManager uses for documents. Use this option if you configure a new cache for storing documents. Default behavior: DocumentManager uses the preconfigured documentContentCache. You can modify the configuration of this cache, or you can create a new cache.</b>
<b>Maximum Size of Cached Content</b>	<b>Specifies the maximum size (in bytes) for a document that DocumentManager stores in the Content Cache. If a query returns a document larger than the maximum size, DocumentManager does not store it in the cache. Default behavior: Caches documents up to 32768 bytes.</b>

## Configure a Document Manager Service

The DocumentManager implementation uses DocumentManager MBeans to maintain its configuration. A deployed DocumentManager finds which DocumentManager MBean to use from the DocumentManagerMBeanName EJB deployment descriptor setting. You will need to configure the DocumentManager MBeans in the application so that their values correspond to the Name attributes in the DocumentManagerMBeanName EJB deployment descriptor.

To configure a Document Manager Service:

1. In the Application Configuration Settings Resource tree, select Document Manager -> specific service you want to configure.

**Note:** If the specific document service does not appear in the Resource tree to the left, click Add/Remove Configurable Item in the Resource tree to see if it has been created. If it appears in the Configurable Items list, follow the instructions [Add or Remove a Configurable Item](#) to add it to the Resource Tree, and restart this process with step 1. If it has not been created, follow the instructions to [Create a New Document Manager Service](#), and restart this process at step 1.

2. Fill in the fields to configure the document manager service. For detailed descriptions of the configuration setting fields, see [Document Manager Service Configuration Parameters](#).
3. Click Update.

A message at the bottom of the window indicates that your changes have been applied.

Related Topics:

- [Create a Document Manager Service](#)
- [Document Manager Service Configuration Parameters](#)
- [Configurable Services](#)
- [Add or Remove a Configurable Item](#)

## Event Service Configuration Parameters

Field Name	Description
Active Listeners	Displays the current set of active listener classes.
Listener Class to Add	Allows you to register custom event listeners (distinct from Behavior Tracking listeners). This lets the system know about your listener. That is, you create the event and then register it in this console. This registration in the console adds the listener to the application-config.xml file.

## Mail Service Configuration Parameters

Field Name	Description
SMTP Host Name	Determines name of the SMTP host that the Mail Service sends to the JavaMail API.



## Payment Service Client Configuration Parameters

Field Name	Description
Defer Authorization?	If checked, this property defers payment authorization to the WebLogic Administration Portal. All payment service authorization calls are disabled and payment transactions are persisted in a RETRY state. Payments must then be reauthorized through the Payment Management screens in the WebLogic Administration Portal.
Payment Web Service WSDL	Enter the Web Services Description Language (WSDL) URL of the payment Web service. WSDL is an XML language that is used to both describe a Web service and to specify how to communicate with the Web service.
Payment Model	<p>Enter one of the following:</p> <ul style="list-style-type: none"><li>• <code>AUTO_MARK_AUTO_SETTLE</code></li><li>• <code>AUTO_MARK_AUTO_SETTLE_AVS</code></li><li>• <code>AUTO_MARK_MANUAL_SETTLE</code></li><li>• <code>AUTO_MARK_MANUAL_SETTLE_AVS</code></li><li>• <code>MANUAL_MARK_AUTO_SETTLE</code></li><li>• <code>MANUAL_MARK_AUTO_SETTLE_AVS</code></li><li>• <code>MANUAL_MARK_MANUAL_SETTLE</code></li><li>• <code>MANUAL_MARK_MANUAL_SETTLE_AVS</code></li></ul>

## Scenario Service Configuration Parameters

Field Name	Description
Rules Request Attribute Name	Enables the Scenario Service to retrieve values from a Request object and use these values for evaluating scenario rules. The value of this attribute is the list of Request object attributes that you want to retrieve and evaluate. Enter one attribute name per line.
Rules Session Attribute Names	Enables the Scenario Service to retrieve values from a Session object and use these values for evaluating scenario rules. The value of this attribute is the list of Session object attributes that you want to retrieve and evaluate. If you use Commerce services, you can include <code>wlcs_shoppingCart</code> to gain access to the shopping cart. Enter one attribute name per line.
Prepend URLs with	Prepends the value that you provide to the URIs for rule sets. The Scenario Service uses ruleset URIs when it communicates with the RulesManager.

## Tax Service Client Configuration Parameters

Field Name	Description
Tax Calculator JNDI Name	The JNDI name of the TaxService EJB. This property is required. Defaults to BEA_commerce.TaxCalculator.
Tax Calculator WSDL	The Web Services Description Language (WSDL) URL of the tax Web service. Defaults to <a href="http://localhost:7001/taxws/BEA_commerce.TaxWebService/wsdl.jsp">http://localhost:7001/taxws/BEA_commerce.TaxWebService/wsdl.jsp</a> . WSDL is an XML language that is used to both describe a Web service and to specify how to communicate with the Web service.
Currency	Enter the ISO 4217 currency code for the currency to be used in your Web application. This property is required.
Ship From Province/State	<p>The state or province from where goods are shipped. This value must be mappable from the &lt;country-abbreviation&gt;.province.properties file using either the name or the abbreviation of the province.</p> <p>This property is not required for addresses outside the United States and Canada. WebLogic Portal provides twoprovince properties files: ca.province.properties for Canada, and us.province.properties for the United States. They are in the ebusiness.jar file in PORTAL_HOME\lib\commerce\ejb. If you need to make changes, unjar theebusiness.jar file, make your updates, and jar the files again. If neededyou can add &lt;country-abbreviation&gt;.province.properties files for countries other than Canada and the U.S.</p>
Ship From City	The city from where goods are shipped. This property is required.
Ship From Postal Code	The ZIP code or postal code from where goods are shipped. This property is required.
Ship From Location Code	The tax table code that specifies an address that covers multiple taxing jurisdictions. It is only used for U.S. and Canadian addresses. This property is optional.
Ship From Country Code	The ISO 3166 two- or three-character abbreviation for the country from which orders are shipped. This property is required.

Order Origin City	This property is exactly the same as the Ship From City property. It is used when the order is taken at a different location than the place where the order is shipped. To determine if an order origin address exists, the commerce services of WebLogic Portal check for the existence of the Order Origin City property. If it does not exist, WebLogic Portal instead defaults to the Ship From City value.
Order Origin Postal Code	This property is exactly the same as the Ship From Postal Code property. It is used when the order is taken at a different location than the place where the order is shipped. To determine if an order origin address exists, the commerce services of WebLogic Portal check for the existence of the Order Origin Postal Code property. If it does not exist, WebLogic Portal instead defaults to the Ship From Postal Code value.
Order Origin Location Code	This property is exactly the same as the Ship From Location Code property. It is used when the order is taken at a different location than the place where the order is shipped. To determine if an order origin address exists, the commerce services of WebLogic Portal check for the existence of the Order Origin Location Code property. If it does not exist, WebLogic Portal instead defaults to the Ship From Location Code value.
Order Origin Country Code	This property is exactly the same as the Ship From Country Code property. It is used when the order is taken at a different location than the place where the order is shipped. To determine if an order origin address exists, the commerce services of WebLogic Portal check for the existence of the Order Origin Country Code property. If it does not exist, WebLogic Portal instead defaults to the Ship From Country Code value.
Title Passage Location	<p>A property that lets the tax service determine the point of title passage. This property is optional and is only used in the United States and Canada. If it is set to</p> <p>shipFrom (case insensitive),</p> <p>it indicates that legal transfer occurred at the point of origin. If set to</p> <p>shipTo</p> <p>it indicates that legal transfer occurred at the point of delivery.</p>

<b>Your Company ID</b>	When you configure the tax service in order to calculate taxes, you need to provide identification information for your company. This property is required. Because it is possible for multiple corporate entities to share a set of configuration files with your tax service, your <code>CompanyId</code> must be specified with each request to the tax service. This property is the identifier for your company as configured in your tax service deployment.
<b>Business Location Code</b>	You may also need to specify your business location for global reporting. If the seller registration number is not set, a global tax service uses the business location and company ID to look up the seller registration number. This mapping is set up using the tax service tools. If neither the business location nor the seller registration number are set, a global tax service cannot properly calculate the tax.
<b>Tax Type</b>	Depending on the nature of your business, you may need to select the type of taxes you want to calculate. Possible tax type values: Sales, Use, ConsumerUse, Rental, Services. The default is sales. The Use value is for commercial use taxes.
<b>AVS Return List On Zip Failure</b>	For some AVS service providers this parameter can be used when a ZIP code cannot be located in the AVS services database. These services return a list of possible replacement ZIP codes to use instead. WebLogic Portal uses this parameter to determine if this condition is an error or if the list of ZIP codes returned should be presented to the end user.
<b>Seller Registration Number</b>	If you have accounts outside of the U.S. or Canada, you might need to set the registration number of the seller. This parameter works with the <code>businessLocation</code> parameter.
<b>Tax Debug</b>	If this parameter exists, regardless of its value, it turns on debugging output for the address verification service.

## Configure Cache Service Configuration Parameters

Field Name	Description
Enabled	Check this item to enable a cache. When not checked, the cache is not populated or used for retrieval. Clearing this check box also flushes the cache and causes the fetch, add, and remove methods to do nothing.
Time to Live	Specifies in milliseconds how long an item can live in the cache before it is automatically expired.
Maximum Number of Entries	<p>Determines the maximum number of items that the cache maintains. This is an integer number; no commas or decimals are allowed. If a cache already contains the maximum number of entries and a service tries to add an item, the cache determines whether the item already exists in the cache. Then it does one of the following:</p> <ul style="list-style-type: none"> <li>• If the item already exists, the cache replaces the entry.</li> <li>• If the item does not already exist, it is added to the cache.</li> </ul> <p>If the cache is at the maximum capacity, then the least recently used element is removed to accommodate the new element.</p>
Flush the Entire Cache?	Allows you to clear the cache contents for every instance of that named cache in the cluster (or just the single instance, if not running in a cluster). Select it, then click Flush.
Invalidate a Specific Key	Allows you to remove the entry corresponding to that key (in a key/value pair) for every instance of that named cache in the cluster (or just the single instance, if not running in a cluster). Enter the item key in the Invalidate a Specific Key box, then click Flush.

## Overview of Search Services

As an administrator, Search is where you create and delete jobs or collections of jobs to be indexed in the search engine. You can also manage search processes.

The core of WebLogic Administration Portal Search is the Dynamic Reasoning Engine (DRE). The DRE inserts and retrieves data into an index relevant to a particular query. The DRE accepts a Boolean term or natural language question and returns a list of documents containing the terms ordered by contextual relevance to the query.

WebLogic Administration Portal Search supports indexing from three types of data sources:

- [Auto Indexer](#) (for documents in the local file structure)
- [HTTP Fetch Jobs](#) (for documents on the Web)
- [ODBC Fetch Jobs](#) (for documents in a database)

**Note:** The ODBC Fetch Jobs require an ODBC database driver.

### Related Topics:

- [Start a Search Service](#)
- [Stop a Search Service](#)
- [Pause a Search Service](#)
- [Restart a Search Service](#)
- [Restart the DRE](#)
- [Create a New HTTP Fetch Job](#)
- [Delete an HTTP Fetch Job](#)
- [Create a New Database](#)
- [Delete a Database](#)
- [Create a New Auto Indexer Job](#)
- [Delete an Auto Indexer Job](#)

## Start a Search Service

As an administrator, you can start a search service that has been stopped.

To start a search service:

1. In the Search Configuration Settings Resource tree, select the search service you want to start.
2. In the Editor pane, verify that the selected service shows Current Status: Stopped.
3. To start the service, click the green Start button.
4. In the Editor pane, verify that the selected service shows Current Status: Running.

The search service is now started.

Related Topics:

- [Stop a Search Service](#)
- [Pause a Search Service](#)
- [Restart a Search Service](#)
- [Restart the DRE](#)
- [Create an HTTP Fetch Job](#)
- [Delete an HTTP Fetch Job](#)
- [Create a Database](#)
- [Delete a Database](#)
- [Create a New Auto Indexer Job](#)
- [Delete an Auto Indexer Job](#)



## Stop a Search Service

As an administrator, you can stop a search service that is running or paused.

To stop a search service:

1. In the Search Configuration Settings Resource tree, select the search service you want to stop.
2. In the Editor pane, verify that the selected service shows Current Status: Running.
3. To stop the service, click the red Stop button.
4. In the Editor pane, verify that the selected service shows Current Status: Stopped.

The search service is now stopped. To return the service to running mode, you need to [start](#) it.

Related Topics:

- [Start a Search Service](#)
- [Pause a Search Service](#)
- [Restart a Search Service](#)
- [Restart the DRE](#)
- [Create a New HTTP Fetch Job](#)
- [Delete an HTTP Fetch Job](#)
- [Create a New Database](#)
- [Delete a Database](#)
- [Create a New Auto Indexer Job](#)
- [Delete an Auto Indexer Job](#)

## Pause a Search Service

As an administrator, you can pause a search service that is running.

**Note:** After a search service has been paused, you must [restart](#) the service to return it to running mode. For the DRE, see Restarting the DRE.

To pause a search service:

1. In the Search Configuration Settings Resource tree, select the search service you want to pause.
2. In the Editor pane, verify that the selected service shows Current Status: Running.
3. To pause the service, click the orange Pause button.
4. In the Editor pane, verify that the selected service shows Current Status: Paused.

The search service is now paused. To return the search service to running mode, you will have to [restart it](#). If you paused the DRE and want to restart it, see [Restart the DRE](#).

Related Topics:

- [Start a Search Service](#)
- [Stop a Search Service](#)
- [Restart a Search Service](#)
- [Restart the DRE](#)
- [Create a New HTTP Fetch Job](#)
- [Delete an HTTP Fetch Job](#)
- [Create a New Database](#)
- [Delete a Database](#)
- [Create a New Auto Indexer Job](#)
- [Delete an Auto Indexer Job](#)

## Restart a Search Service

As an administrator, you can restart a search service that has been paused.

**Note:** If you want to return the DRE to running mode, see [Restart the DRE](#).

To restart a search service:

1. In the Search Configuration Settings Resource tree, select the search service you want to restart.
2. In the Editor pane, verify that the selected service shows Current Status: Paused.
3. To restart the service, click the yellow Restart button. This stops the service.
4. Click the green Start button.
5. In the Editor pane, verify that the selected service shows Current Status: Running.

The search service is now restarted.

Related Topics:

- [Restart the DRE](#)
- [Start a Search Service](#)
- [Stop a Search Service](#)
- [Pause a Search Service](#)
- [Create a New HTTP Fetch Job](#)
- [Delete an HTTP Fetch Job](#)
- [Create a New Database](#)
- [Delete a Database](#)
- [Create a New Auto Indexer Job](#)
- [Delete an Auto Indexer Job](#)

## Restart the DRE

As an administrator, you can restart the DRE after it has been paused.

To restart the DRE:

1. In the Search Configuration Settings Resource tree, select the DRE.
2. In the Editor pane, verify that the DRE shows Current Status: Paused.
3. To restart the service, click the yellow Restart button.
4. In the Editor pane, verify that the DRE shows Current Status: Running.

The DRE is now restarted.

Related Topics:

- [Start a Search Service](#)
- [Stop a Search Service](#)
- [Pause a Search Service](#)
- [Restart a Search Service](#)
- [Create a New HTTP Fetch Job](#)
- [Delete an HTTP Fetch Job](#)
- [Create a New Database](#)
- [Delete a Database](#)
- [Create a New Auto Indexer Job](#)
- [Delete an Auto Indexer Job](#)

## Create a New HTTP Fetch Job

As an administrator, you can create a new HTTP fetch job and point the job to a particular URL.

To create a new HTTP fetch job:

1. In the Search Configuration Settings Resource tree, select HTTP Fetch.
2. In the Configuration for HTTP Fetch window in the Editor pane, go to the Jobs field and click Create.
3. In the pop-up window, enter the appropriate information for the following fields:
  - Job Name - The name you want to give this job
  - URL - The URL to be searched
  - Database Name - The name of the database within the DRE to be searched
  - Repeat Seconds - The time for the search to repeat
4. Click Create.

**Note:** To quit creation of a new HTTP fetch job, click Cancel.

The new HTTP fetch job is now configured.

Related Topics:

- [Start a Search Service](#)
- [Stop a Search Service](#)
- [Pause a Search Service](#)
- [Restart a Search Service](#)
- [Restart the DRE](#)
- [Delete an HTTP Fetch Job](#)
- [Create a New Database](#)
- [Delete a Database](#)
- [Create a New Auto Indexer Job](#)
- [Delete an Auto Indexer Job](#)

## Delete an HTTP Fetch Job

As an administrator, you can delete an existing HTTP fetch job.

To delete an HTTP fetch job:

1. In the Search Configuration Settings Resource tree, select HTTP Fetch.
2. In the Configuration for HTTP Fetch window in the Editor pane, go to the Jobs field and click the box to the right of the job name and URL you want to delete.
3. Click Delete.

The HTTP fetch job is now deleted.

Related Topics:

- [Start a Search Service](#)
- [Stop a Search Service](#)
- [Pause a Search Service](#)
- [Restart a Search Service](#)
- [Restart the DRE](#)
- [Create a New HTTP Fetch Job](#)
- [Create a New Database](#)
- [Delete a Database](#)
- [Create a New Auto Indexer Job](#)
- [Delete an Auto Indexer Job](#)

## Create a New Database within the DRE

As an administrator, you can create a new database within the DRE. When you create a new database, you are essentially creating an index in the search engine.

To create a database:

1. In the Search Configuration Settings Resource tree, select DRE.
2. In the Configuration for DRE window in the Editor pane, go to the Databases field and click Create.
3. In the pop-up window, enter the name of the new database. This adds an entry in the PortalSearchDRE.cfg file and allows the DRE to keep track of which jobs are in certain databases.
4. Click Create.

**Note:** To quit the creation of a database, click Cancel.

The database is now shown in the Databases field.

Related Topics:

- [Start a Search Service](#)
- [Stop a Search Service](#)
- [Pause a Search Service](#)
- [Restart a Search Service](#)
- [Restart the DRE](#)
- [Create a New HTTP Fetch Job](#)
- [Delete an HTTP Fetch Job](#)
- [Delete a Database](#)
- [Create a New Auto Indexer Job](#)
- [Delete an Auto Indexer Job](#)

## Delete a Database within the DRE

As an administrator, you can delete a database within the DRE.

To delete a database:

1. In the Search Configuration Settings Resource tree, select DRE.
2. In the Configuration for DRE window in the Editor pane, go to the Databases field and click the box to the right of the database you want to delete.
3. Click Delete.

The database is now deleted.

Related Topics:

- [Start a Search Service](#)
- [Stop a Search Service](#)
- [Pause a Search Service](#)
- [Restart a Search Service](#)
- [Restart the DRE](#)
- [Create a New HTTP Fetch Job](#)
- [Delete an HTTP Fetch Job](#)
- [Create a New Database](#)
- [Create a New Auto Indexer Job](#)
- [Delete an Auto Indexer Job](#)



## Create a New Auto Indexer Job

As an administrator, you can create a new auto indexer job and point the job to a particular location in the local file structure.

To create a new auto indexer job:

1. In the Search Configuration Settings Resource tree, select Auto Indexer.
2. In the Editor pane in Configuration for Auto Indexer window, go to the Jobs field and click Create.
3. In the pop-up window, enter the appropriate information for the following fields:
  - Job Name - The name you want to give this job
  - Path - The path to the local file structure
  - Database Name - The name of the database within the DRE to be searched
  - Repeat Seconds - The time for the search to repeat
4. Click Create.

**Note:** To quit the creation of a new auto indexer job, click Cancel.

The new auto indexer job is now configured.

Related Topics:

- [Start a Search Service](#)
- [Stop a Search Service](#)
- [Pause a Search Service](#)
- [Restart a Search Service](#)
- [Restart the DRE](#)
- [Create a New HTTP Fetch Job](#)
- [Delete an HTTP Fetch Job](#)
- [Create a New Database](#)
- [Delete a Database](#)
- [Delete an Auto Indexer Job](#)

## Delete an Auto Indexer Job

As an administrator, you can delete an auto indexer job in the search configuration settings.

To delete an auto indexer job:

1. In the Search Configuration Settings Resource tree, select Auto Indexer.
2. In the Configuration for Auto Indexer window in the Editor pane, go to the Jobs field and click the box to the right of the job name and path you want to delete.
3. Click Delete.

**Note:** To quit the deletion of an auto indexer job, click Cancel.

The auto indexer job is now deleted.

Related Topics:

- [Start a Search Service](#)
- [Stop a Search Service](#)
- [Pause a Search Service](#)
- [Restart a Search Service](#)
- [Restart the DRE](#)
- [Create a New HTTP Fetch Job](#)
- [Delete an HTTP Fetch Job](#)
- [Create a New Database](#)
- [Delete a Database](#)
- [Create a New Auto Indexer Job](#)