



BEA WebLogic Portal™

Tour of the Avitek Financial Sample Portal

Version 4.0
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Tour of the Avitek Financial Sample Portal

Part Number	Date	Software Version
N/A	November 2002	4.0, Service Pack 3

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About This Document

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

This document covers the following topics:

- [Chapter 1, “Introducing the Avitek Financial Sample Portal”](#) provides a brief description of the tour, how to install the Sample Portal, release notes, licensing, and how to start the tour.
- [Chapter 2, “Overview of the Portlets”](#) contains a brief description of each portlet, discusses visitor types and passwords, and describes portlet controls.
- [Chapter 3, “Sample Portal Pages”](#) describes the two Sample Portal pages.
- [Chapter 4, “The Web Page Portlets”](#) describes the portlets on the Web Page.
- [Chapter 5, “Campaigns and Portlets”](#) describes the campaigns employed in the Sample Portal and the portlets that use these campaigns.
- [Chapter 6, “Newsletter Portlets”](#) is about the three types of Newsletter portlets.
- [Chapter 7, “Miscellaneous Portlets”](#) describes the other various portlets.

What You Need to Know

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

e-docs Web Site

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

How to Print the Document

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

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

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

Related Information

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

- *Getting Started with Portals and Portlets*
- *Tour of the Stock Portal*
- *Deployment Guide*
- *Guide to Developing Campaign Infrastructure*

-
- *Guide to Events and Behavior Tracking*
 - *Guide to Building Personalized Applications*
 - *Guide to Managing Presentation and Business Logic: Using Webflow and Pipeline*

Contact Us!

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

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

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

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

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

Documentation Conventions

The following documentation conventions are used throughout this document.

Convention	Item
boldface text	Indicates terms defined in the glossary.
Ctrl+Tab	Indicates that you must press two or more keys simultaneously.
<i>italics</i>	Indicates emphasis or book titles.
monospace text	Indicates code samples, commands and their options, data structures and their members, data types, directories, and file names and their extensions. Monospace text also indicates text that you must enter from the keyboard. <i>Examples:</i> <pre>#include <iostream.h> void main () the pointer psz chmod u+w * \tux\data\ap .doc tux.doc BITMAP float</pre>
monospace boldface text	Identifies significant words in code. <i>Example:</i> <pre>void commit ()</pre>
<i>monospace italic text</i>	Identifies variables in code. <i>Example:</i> <pre>String <i>expr</i></pre>
UPPERCASE TEXT	Indicates device names, environment variables, and logical operators. <i>Examples:</i> <pre>LPT1 SIGNON OR</pre>

Convention	Item
{ }	Indicates a set of choices in a syntax line. The braces themselves should never be typed.
[]	Indicates optional items in a syntax line. The brackets themselves should never be typed. <i>Example:</i> buildobjclient [-v] [-o name] [-f file-list]... [-l file-list]...
	Separates mutually exclusive choices in a syntax line. The symbol itself should never be typed.
...	Indicates one of the following in a command line: <ul style="list-style-type: none"> ■ That an argument can be repeated several times in a command line ■ That the statement omits additional optional arguments ■ That you can enter additional parameters, values, or other information The ellipsis itself should never be typed. <i>Example:</i> buildobjclient [-v] [-o name] [-f file-list]... [-l file-list]...
.	Indicates the omission of items from a code example or from a syntax line. The vertical ellipsis itself should never be typed.



1 Introducing the Avitek Financial Sample Portal

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

The Sample Portal contains several marketing campaigns, the ability to trade stock, and the ability author and review newsletters; it contains specific portlets for investors to access company profiles, service requests, and newsletters written by their financial advisors; plus it contains convenience portlets such as Dictionary, Bookmarks, Stock Quotes, And Web Search.

The Tour of the Avitek Financial Sample Portal shows you every portlet in the Sample Portal and demonstrates many possibilities in portlet design and content. This tour is *not* intended to demonstrate portal functionality. To familiarize yourself with portal functionality, please take the “[Tour of the Stock Portal](#).”

You can take the Tour of the Avitek Financial Sample Portal in the order it is presented or simply go to the portlet your interested in and follow the instructions. **The password for all predefined visitors (visitor1–visitor10) is “password”**. This tour provides descriptions and instructions for accessing and using each Sample Portal portlet and

provides information about underlying processes, the location of its Java and Java Server Pages (JS), and other pertinent information, such as whether a portlet is part of a marketing campaign.

This topic includes the following sections:

- [Installing the Avitek Financial Sample Portal](#)
- [Release Notes](#)
- [Configuring the Avitek Financial Sample Portal for Oracle](#)
- [Starting the Tour](#)

Installing the Avitek Financial Sample Portal

This section describes how to install the Sample Portal.

Before you install the Sample Portal, make sure the following are installed:

- BEA WebLogic Server 6.1 Service Pack 2
- BEA WebLogic Portal Service Pack 2

Note: The Sample Portal application shown in this tour cannot be run if you have the WebLogic Personalization Server only license. However, there is a separate document for WebLogic Personalization Server users; see the [“Personalization Examples.”](#)

To install the Sample Portal, complete the following steps:

1. Download the Sample Portal zip file from the BEA Developer Center at <http://developer.bea.com/index.jsp>.
2. Extract the `sampleportal.zip` files to `PORTAL_HOME`, where `PORTAL_HOME` is the directory in which you installed BEA WebLogic Portal Service Pack 1.
3. During extraction, replace any files that you are asked to overwrite.
4. Navigate to the `PORTAL_HOME\config\sampleportalDomain` directory.
5. Edit `config.xml` as follows:

- a. Replace all five instances of “@P13N_DIR_FORWARD_SLASH@” with the location of the WebLogic Portal directory (for example: C:\bea\wlportal4.0).
Note: Be sure to use forward slashes (/).
- b. Save and close `config.xml`.
6. Navigate to the `PORTAL_HOME\applications\sampleportal\META-INF` directory.
7. Edit `application_config.xml` as follows:
 - a. Replace the two instances of “@BEA_WEBLOGIC_COMMERCE_SERVER_HOME@” with the location of the WebLogic Portal directory (for example: C:\bea\wlportal4.0).
Note: Be sure to use forward slashes (/).
 - b. Save and close `application_config.xml`.
8. Navigate to the `PORTAL_HOME\applications\sampleportal\db` directory.
9. Run `create_sampleportaldb.bat/sh`. This creates the Cloudscape Sample Portal tables and data.
10. Navigate to the `PORTAL_HOME\config\sampleportalDomain` directory.
11. Run `startSamplePortal.bat/sh`. The Sample Portal starts.
12. When prompted, enter “weblogic” as the password.
13. After the Sample Portal starts, navigate to the `PORTAL_HOME\bin\win32` or the `PORTAL_HOME/bin/unix` directory.
14. Run `loadads.bat/sh`. This script loads sample data to the database.
15. Run `loaddocs.bat/sh`. This script loads sample data to the database.
16. Navigate to the `PORTAL_HOME\applications\sampleportal-project` directory.
17. Run `sync.bat/sh`. This script updates WebLogic Portal with the Sample Portal application data.

This completes the installation of the Sample Portal. To view the Sample Portal go to [“Starting the Tour” on page 1-7](#).

Release Notes

The following list documents known bugs in the Sample Portal.

1. **User Registration Zip Code field scrolls indefinitely (CR062333).**

The maximum length of ZIP Code field is specified as 11 characters. The field scrolls beyond the eleventh character position.

2. **Email field allows does not conform to the user@domain.com format (CR062334).**

A user can enter an incomplete email address.

3. **Load Test terminated early due to an exception (CR062867).**

Load test terminates with exception detected in native code when 100 users perform the following: Log in; Navigate to the Web Portal page; maximize the Dictionary portlet; unmaximize the Dictionary portlet; minimize the Dictionary portlet; unminimize the Dictionary portlet; and then log out.

4. **Quick Links Portlet shows incorrect for Customer Service user (CR063031).**

For visitor5, Quick Links Portlet displays “Your Role: Investor” when it should display “Your Role: Customer Service”

5. **Javadoc needed for all Sample Portal code. (CR063035).**

The portlets in the Sample Portal are not properly documented in Javadocs.

6. **The configjca.bat/sh does not display status confirmation (CR063242).**

When the configjca script runs, on both windows and UNIX, no confirmation or status is displayed to the user, so you don’t know if the script ran correctly.

7. **Exception thrown on Solaris when entering new user with non-English language and long ZIP Code string (CR065187).**

When a ZIP Code greater than 11 characters is entered and a language other than English is selected, an exception is thrown on Solaris but not on Windows.

8. **Exception thrown on Solaris when changing default page or removing page through Visitor Tools (CR065475).**

When changing the default Home Page, exception is thrown to the console. However, the front end appears to work correctly.

Configuring the Avitek Financial Sample Portal for Oracle

This topic describes how to configure the Sample Portal for use with Oracle databases.

Note: More information about configuring WebLogic Portal for Oracle databases is available in “[Configuring WebLogic Portal for Oracle Databases](#)” in the *Deployment Guide*.

1. With the Sample Portal running in Cloudscape, complete the following:
 - a. Configure the WebLogic Portal JDBC connection pools for Oracle and update the settings for the RDBMS security realm, and as described in “[Configure Properties and Environment Variables for Oracle](#)” in the *Deployment Guide*.
 - b. Configure the JDBC Helper Delegate as described in “[Configure the JDBC Helper Service](#)” in the *Deployment Guide*.
2. Stop the server.
3. Navigate to the `BEA_HOME\PORTAL_HOME\bin\win32` or `wlportal4.0/bin/unix` directory, where `PORTAL_HOME` is the directory in which you installed BEA WebLogic Portal Service Pack 1.
4. Edit `set-environment.bat/sh`, as indicated in the following steps:
 - a. Comment out Cloudscape database properties and uncomment Oracle database properties.
 - b. Configure the server, user-id, and password properties to use the Oracle database.

Note: For additional information, see “[Update Environment Variables for the Server](#)” in the *Deployment Guide*.

5. Navigate to the `PORTAL_HOME\db` directory.

1 *Introducing the Avitek Financial Sample Portal*

6. In `create_all.bat/sh`, configure the server, user-id, and password to use the Oracle database.
7. Edit the `databaseload.properties` file, as follows:
 - a. Comment out Cloudscape database properties and uncomment Oracle database properties.
 - b. Edit the server, user-id, and password to use the Oracle database.
8. Run `create_all.bat/sh`. This will create your oracle database.
9. Navigate to the `PORTAL_HOME\applications\sampleportal\db` directory.
10. Edit the `create_sampleportaldb.bat/s` file as follows:
 - a. Comment out the Cloudscape database properties and uncomment the Oracle database properties.
 - b. Edit the server, user-id, and password to use the Oracle database.
11. Run `create_sampleportaldb.bat/sh`. This script creates three tables specific to the Sample Portal application.
12. Navigate to the `PORTAL_HOME\config\sampleportalDomain` directory.
13. Edit the `configjca.bat` file as follows:
 - a. Comment out the Cloudscape database properties and uncomment the Oracle database properties.
 - b. Edit the server, user-id, and password to use the Oracle database.
14. If you are running UNIX or you installed in a location other than `C:\bea\wlportal4.0`, modify the `.ant.properties` file in the `PORTAL_HOME` directory. Change the directory for `p13n.dir` so that it points to the correct directory. For example, the entry should look like the following:
 - **Windows:** `p13n.dir=D:\\bea\\wlportal4.0`
 - **UNIX:** `p13n.dir=/home/bea/wlportal4.0`
15. Run `configjca.bat/sh`. This script allows the Customer Service portlet to run against an Oracle database; other portlets are not affected.
16. Navigate to the `PORTAL_HOME\config\sampleportalDomain` directory.

17. Run `startSamplePortal.bat/sh`. The server starts.
18. When prompted, enter “weblogic” as the password for WebLogic Portal.
19. After the Sample Portal starts, navigate to the `PORTAL_HOME\bin\win32` directory or the `PORTAL_HOME/bin/unix` directory.
20. Run `loadads.bat/sh`. This script loads sample data to the database.
21. Run `loaddocs.bat/sh`. This script loads sample data to the database.
22. Navigate to the `PORTAL_HOME\applications\sampleportal-project` directory.
23. Run `sync.bat/sh`. This script updates WebLogic Portal with the Sample Portal application data.

The Sample Portal is now configured for Oracle databases.

Starting the Tour

Before you begin the Tour of the Avitek Financial Sample Portal, make sure the following are installed:

- WebLogic Server 6.1 Service Pack 2
- WebLogic Portal Service Pack 2

Note: You must start the WebLogic Portal in the Sample Portal domain.

1. Start the Sample Portal as follows:
 - a. Navigate to the `PORTAL_HOME\config\sampleportalDomain` directory.
 - b. Run `startSamplePortal.bat/sh`. The Sample Portal starts.
 - c. Enter “weblogic” as password for WebLogic Portal.

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

1 *Introducing the Avitek Financial Sample Portal*

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

2. In a browser window, enter the following URL:

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

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

Note: The default port is 7501. For information on changing port numbers, see “[Configure Listen Ports](#)” in the *Deployment Guide*.

2 Overview of the Portlets

This topic provides an overview of the Avitek Financial Sample Portal portlets, outlines the different visitor types, briefly discusses each portlet, and provides a description of portlet controls. This topic contains the following sections:

- [Portlet Overview](#)
- [Visitor Types and Passwords](#)
- [Portlet Controls](#)

Portlet Overview

As previously mentioned, the Sample Portal contains a wide variety of portlets. [Table 2-1](#) provides an overview of each portlet.

Table 2-1 Overview of the Sample Portal Portlets

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

2 Overview of the Portlets

Portlet	Description	Available To	Page
What's Hot	Displays the number of times each company in the Company Profiles portlet is clicked. You can also display this portal's content in an Excel spreadsheet.	Visitors 1–10	Home
Company Profiles	Displays an HTML document showing company information using a content selector.	Visitors 1–10	Home
My Work	Provides a To Do list for personal activities.	Visitors 1–10	Home
Team Work	Provides a To Do list for a group.	Visitors 1–10	Home
Portfolio	Displays selected stock symbols, number of shares, and value. Also provides the ability to trade stock.	Visitors 1–10	Home
Newsletters	Displays newsletters to an investor visitor. The particular newsletters a visitor sees matches that visitor's user profile. The newsletters are written by the visitor's financial advisor.	Visitors 4–7	Home
MyNewsletters	Displays newsletters and their approval status. You can also author newsletters in this portlet.	Visitors 2–3	Home
Review Newsletters	Displays the newsletters written by the financial advisors for approval, rejection, or removal.	Visitor 1	Home
Customer Service	Provides a means for entering a customer service request. This portlet demonstrates integration with the JCA sample database adaptor provided with Weblogic Server 6.1.	Visitors 1–10	Home

Portlet	Description	Available To	Page
Customer Service (Service Representative View)	Displays all service requests to the Customer Service Representative.	Visitor 5	Home
Email	Displays the contents of a visitor's e-mail inbox.	Visitors 1–10	Home
World News	Connects to external sites that provide RSS (Rich Site Summary) information, retrieves news topics based on visitor preference, and displays them as clickable links.	Visitors 1–10	Web
Dictionary	Looks up the definition of a word by connecting to Merriam-Webster Web site.	Everyone	Web
Quote	Provides a stock information from Yahoo Finance.	Everyone	Web
Web Search	Web search through Yahoo, Excite, or Lycos.	Everyone	Web
Bookmarks	Provides the ability to create and maintain a list of Web site links.	Visitors 1–10	Web

Visitor Types and Passwords

The Sample Portal has ten predefined visitors (visitor1, visitor2 ... visitor10). **All predefined visitors use the same password, which is “password” and is case sensitive.** Every visitor belongs to a group and a role. The portlets displayed to a particular visitor depend on that visitor's group membership and role. Each group and role has different privileges. To see the functionality of the various portlets, you need to switch visitor types.

The following list describes each group and role:

2 Overview of the Portlets

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

Table 2-2 Visitor, Group, and Role Associations

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

Portlet Controls

Portlet controls allow you to use portlets. For example, a portlet may have more than one view; it may be maximized, minimized, or detached from the portal. Portlet views are implemented using JavaServer Pages (JSP). They range in complexity from containing simple static HTML content to employing JSP tag libraries or JSP scriptlets that access EJB components or other application functionality within the application server. The controls for portlets in the Sample Portal are listed in [Table 2-3](#).

Table 2-3 Portlet Controls

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

2 *Overview of the Portlets*

3 Sample Portal Pages

The Avitek Financial Sample Portal consists of the two pages; the Home page and the Web page. These portal pages contain all the portlets in the Sample Portal and are described in detail in the following sections:

- [Home Page](#)
 - [Home Page—Visitor Not Logged In](#)
 - [Home Page—Visitor Logged In](#)
- [Web Page](#)
 - [Web Page—Visitor Not Logged In](#)
 - [Web Page—Visitor Logged In](#)

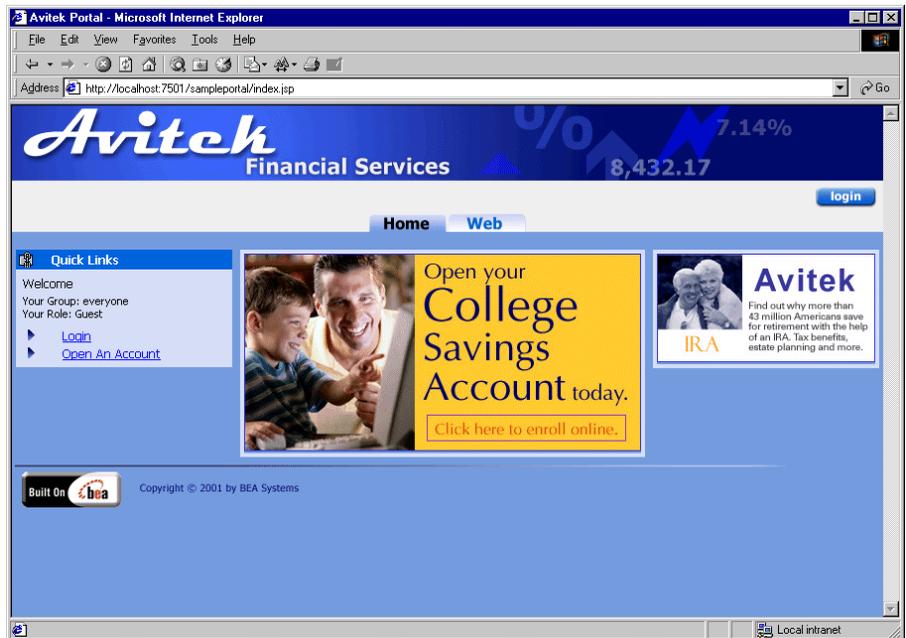
Home Page

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

Home Page—Visitor Not Logged In

The default Home page, shown in [Figure 3-1](#), appears before a visitor logs in. The default Home page contains one portlet: Quick Links. The College Savings Account and Avitek IRA advertisements occupy ad placeholders. The content of these ad placeholders changes depending on which campaign is invoked. For a full discussion about the campaigns in the Sample Portal, see [Chapter 5, "Campaigns and Portlets."](#)

Figure 3-1 Sample Portal Home Page—Default



Home Page—Visitor Logged In

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

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

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

4. Click the Login button. The Home page opens, as shown in [Figure 3-2](#).

Figure 3-2 Sample Portal Home Page—Logged In (Visitor 10)

Avitek
Financial Services

7.14%
8,432.17

customize my portal change password logout

Home Web

Quick Links

Welcome
Your Group: Avitek
Your Role: Guest

- Logout
- Update Profile

What's Hot

Title	Counts (updated each minute)
Juniper Networks	12
General Electric	4
Citigroup	4
Exxon Mobil	3
College Planning Campaign	2
Macromedia	2
Wells Fargo	2
IRA Campaign	1
Micron Technology	1

Total: 31
[View as Excel spreadsheet](#)

Company Profiles

Profiles of publicly traded companies.

- Citigroup
- Exxon Mobil
- General Electric
- Juniper Networks
- Macromedia
- Micron Technology
- Verisign
- Wells Fargo

My Work

No items have been saved.

Team Work

No items have been saved.

Portfolio

Avitek Trading [Trade](#)

You currently have no stocks purchased.

Symbol	Bid	Ask	Qty	Value
DJIA	↑ 11,010	11,010	--	--
NASDAQ	↑ 2,254	2,254	--	--

Total Value: \$0.00

Customer Service

There is no request call.

College Savings Account

Open your College Savings Account today.
[Click here to enroll online.](#)

Avitek IRA

Find out why more than 43 million Americans save for retirement with the help of an IRA. Tax benefits, estate planning and more.

Email

You have not configured your email settings yet.

Built On Copyright © 2001 by BEA Systems

5. Notice that Visitor 10's Home page contains eight portlets. Visitor 10 belongs to the Avitek group. Group managers determine which portlets their members can access. For a tour about group management see "[Portal Management](#)" in the *Tour of the Stock Portal*.
6. To logout, click the Logout button. The Home page returns to its default configuration.

Web Page

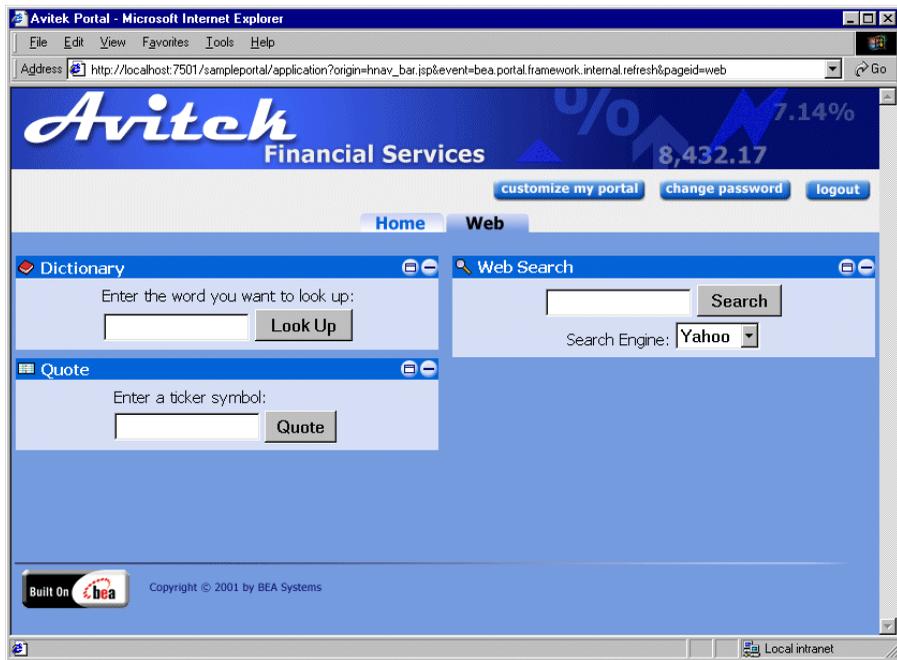
Like the Home page, the contents of the Web page also depend on whether a visitor is logged in or not. The following sections illustrate these differences.

Web Page—Visitor Not Logged In

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

The default Web page contains three portlets: Dictionary, Web Search, and Quote. [Figure 3-3](#) shows the Web Page when a visitor has not logged in.

Figure 3-3 Sample Portal Web Page—Default



Web Page—Visitor Logged In

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

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

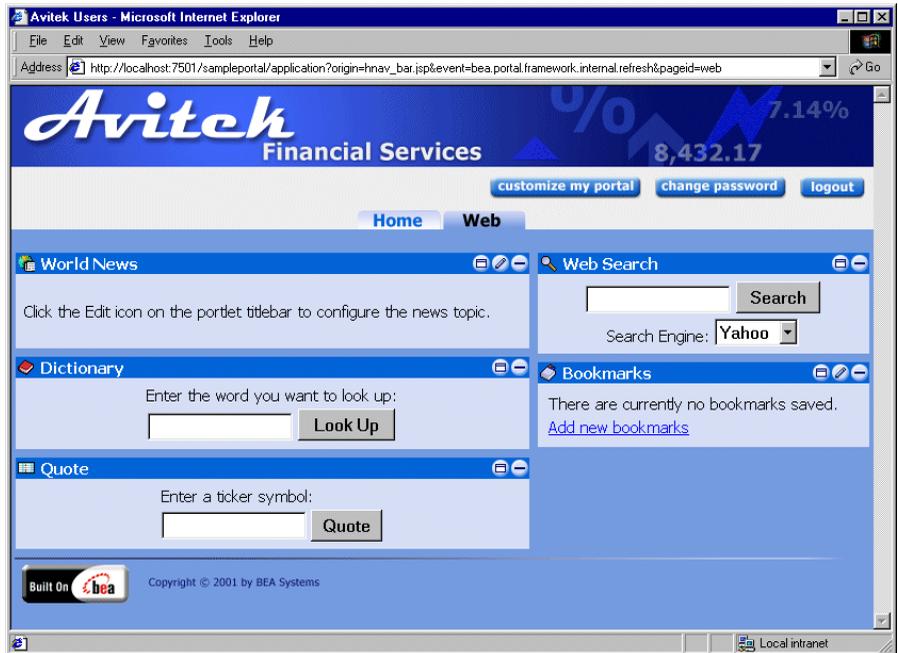
Note: The password for visitor1–10 is “password”.

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

3 Sample Portal Pages

The Web page for Visitors 1–10 contains five portlets: World News, Dictionary, Web Search, Bookmarks, and Quote. [Figure 3-4](#) shows the Web page for these visitors.

Figure 3-4 Sample Portal Web Page



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

4 The Web Page Portlets

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

- [Dictionary Portlet](#)
- [Quote Portlet](#)
- [Web Search Portlet](#)
- [World News Portlet](#)
- [Bookmarks Portlet](#)

Dictionary Portlet

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

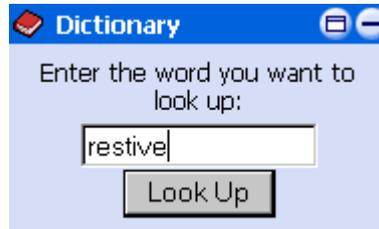
Java source: none

JSP source: sampleportal/dictionary

Note: You do not need to login to use this portlet.

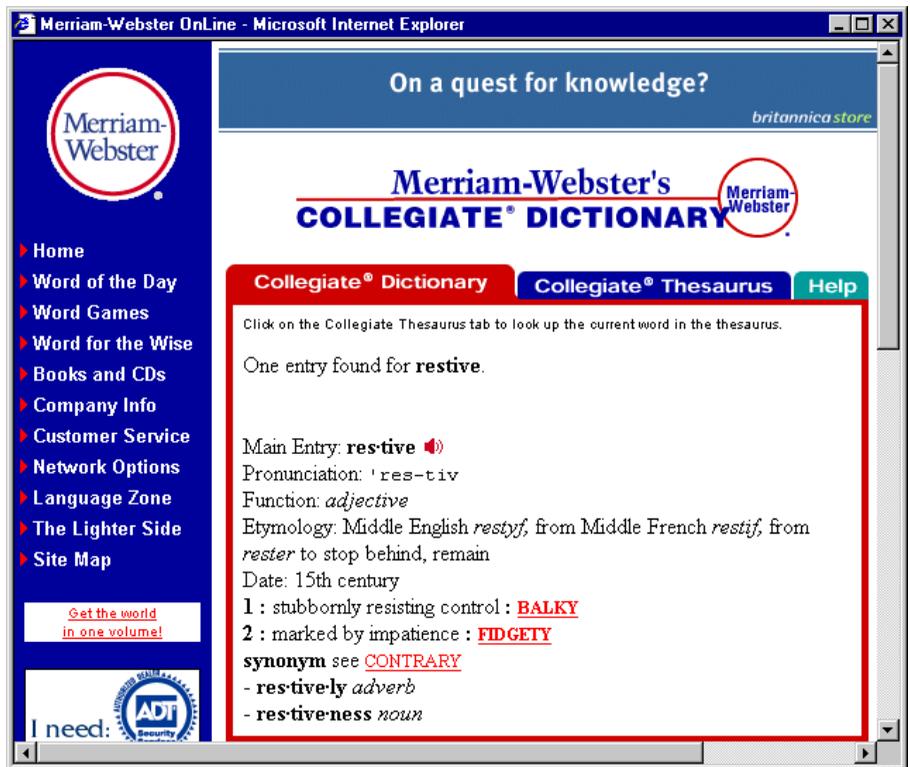
1. From the Home page, click the Web tab.
2. As shown in [Figure 4-1](#), enter a word in the word field, and then click the Look Up button.

Figure 4-1 Dictionary Portlet



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

Figure 4-2 Dictionary Window



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

Quote Portlet

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

Java source: none

JSP source: sampleportal/quote

Note: You do not need to login to use this portlet.

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

Figure 4-3 Quote Portlet



A new window opens that shows the selected quote information, as shown in [Figure 4-4](#).

Figure 4-4 Quote Window



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

Web Search Portlet

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

Java source: none

JSP source: sampleportal/search

Note: You do not need to login to use this portlet.

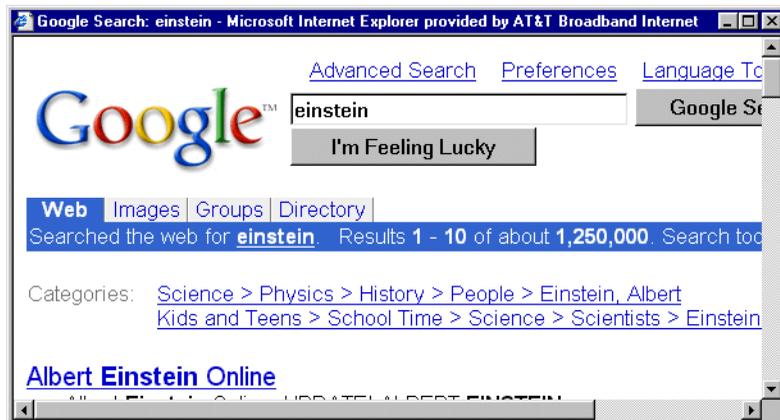
1. From the Home page, click the Web tab.
2. As shown in [Figure 4-5](#), enter a search term in the field, and then click the Search button.

Figure 4-5 Web Search Portlet



A new window opens showing the search results in the selected search engine, as shown in [Figure 4-6](#).

Figure 4-6 Web Search Window



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

World News Portlet

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

Java Source: examples/sampleportal/worldnews

JSP Source: sampleportal/sampleportal/portlets/worldnews

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

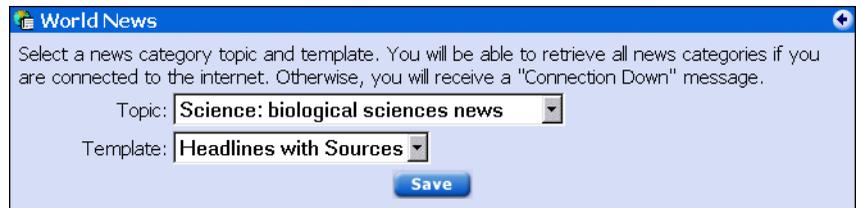
1. Login as any visitor.
2. From the Home page, click the Web tab. [Figure 4-7](#) shows the World News Portlet before it has been configured.

Figure 4-7 World News Portlet—Not Configured



3. Click the Edit button in the titlebar. The portlet maximizes and is now editable, as shown in [Figure 4-8](#).

Figure 4-8 World News Portlet—Editable



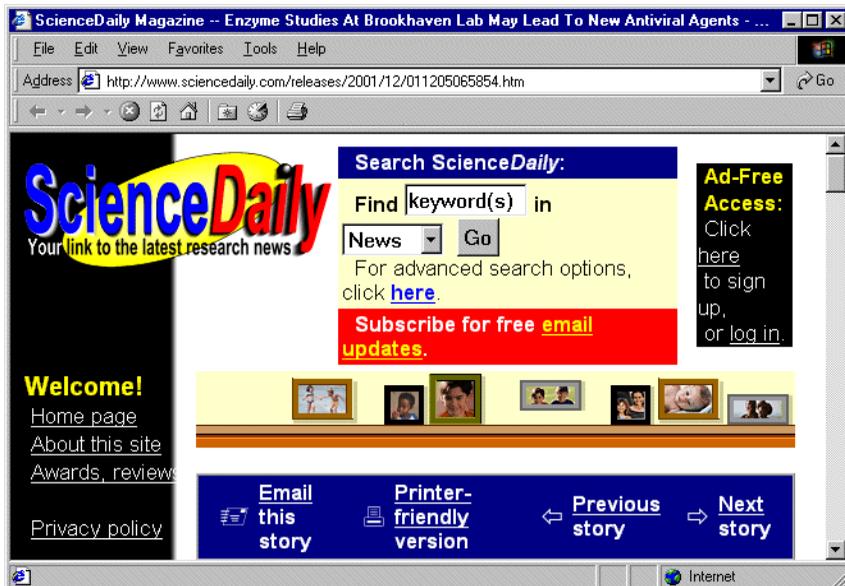
4. Select a Topic and a Template from the drop-down lists, click the Save button, and then click the Finished button. The portlet now shows the topics from the selected news source, as shown in [Figure 4-9](#).

Figure 4-9 World News Portlet—Configured



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

Figure 4-10 World News Story Window



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

Bookmarks Portlet

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

Java Source: `examples/sampleportal/bookmark`

JSP Source: `sampleportal/sampleportal/portlets/bookmark`

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

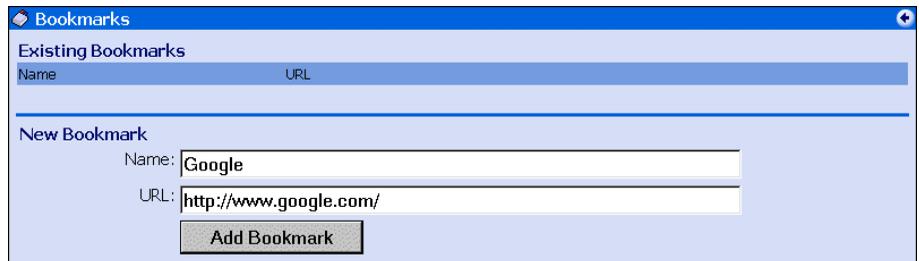
1. Login as any visitor.
2. After the Home page appears, click the Web tab. The Bookmarks portlet appears, as shown in [Figure 4-11](#).

Figure 4-11 Bookmarks Portlet—No Saved Bookmarks



3. Click Add new bookmarks. The portlet expands, as shown in [Figure 4-12](#).

Figure 4-12 Bookmarks Portlet—Adding a Bookmark



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

Figure 4-13 Bookmarks Portlet—Bookmarks Added

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

Figure 4-14 Bookmarks Portlet—Saved Bookmarks

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

Figure 4-15 Bookmarks Window



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

5 Campaigns and Portlets

The Avitek Financial Sample Portal contains five marketing campaigns, which are listed below:

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

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

- [Quick Links Portlet](#)
- [Portfolio Portlet](#)
- [Company Profiles Portlet](#)

Quick Links Portlet

The Quick Links portlet provides various kinds of information and useful links, such as group membership, login and logout, and risk rating. It invokes the security Webflow and sets the portfolio portlet into edit mode. For more information about Webflow, see the *Guide to Managing Presentation and Business Logic: Using Webflow and Pipeline*. For more information about security, see the *Security Guide*.

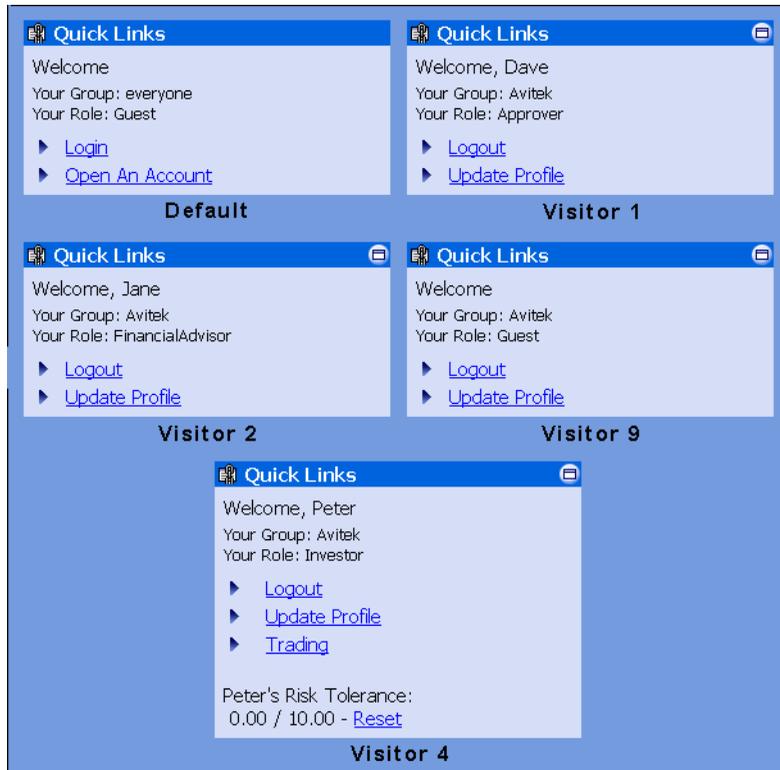
Java Source:

sampleportal/sampleportal/WEB-INF/src/examples/sampleportal/navigation/ip

JSP Source: sampleportal/navigation

The contents of the portlet depend on the visitor's group membership. [Figure 5-1](#) shows an example of the Quick Links portlet for different visitors.

Figure 5-1 Quick Links Portlet—Group Membership Differences



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

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

1. If you are logged in, log out.
2. In the default Quick Links portlet, click Open An Account, as shown in [Figure 5-2](#).

Figure 5-2 Quick Links Portlet—Default



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

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

Figure 5-3 Open a New Account Page

Avitek
Financial Services

7.14%
8,432.17

Open a New Account

Please enter the following user information. Fields denoted by red stars are required.

Account Information

User Name *

Password *

Confirm Password *

Password Hint *

User Information

First Name *

Last Name *

Email Address

Gender

Risk Rating

Financial Preferences

Primary Interest

Financial Advisor

Built On Copyright © 2001 by BEA Systems

- Click the Save button. The Home page returns and the Quick Links portlet welcomes the new visitor, as shown in Figure 5-4.

Figure 5-4 Quick Links Portlet—New User



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

Figure 5-5 Welcome Email Message

```
Date: Tue, 18 Dec 2001 16:22:19 -0700
To: myname@myname.com
From: ceo@avitek.com
Subject: Welcome

Welcome to Avitek Financial. Thank you for registering.
```

Note: For more information about email campaigns, see “[Setting Up and Sending E-mail for Campaigns](#)” in the *Guide to Developing Campaign Infrastructure*.

6. To log out, click the Logout button.

Portfolio Portlet

The Portfolio portlet displays selected stock symbols, number of shares, and share value. Changes in this portlet help fulfill one of the conditions necessary to invoke the Avitek Credit Card campaign: the purchase of \$25,000 in stock. The Portfolio portlet is an EJB 2.0 implementation that use Pipelines. The information in this sample portlet is stored in a database, which can be extended to retrieve information from a real-time service. For more information about Pipelines, see the *Guide to Managing Presentation and Business Logic: Using Webflow and Pipeline*.

Java Source:

sampleportal/sampleportal/WEB-INF/src/examples/sampleportal/portfolio/ip

JSP Source: sampleportal/sampleportal/portlets/portfolio

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

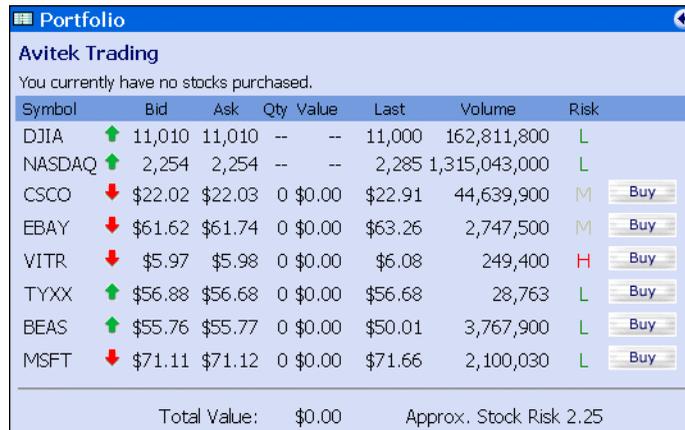
1. Log in as “visitor7”.
2. In the Portfolio portlet, click the Trade link, as shown in [Figure 5-6](#).

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



The portlet expands, as shown in [Figure 5-7](#).

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



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

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



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

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

Avitek Trading								
Symbol	Bid	Ask	Qty	Value	Last	Volume	Risk	
DJIA	11,010	11,010	--	--	11,000	162,811,800	L	
NASDAQ	2,254	2,254	--	--	2,285	1,315,043,000	L	
CSCO	\$22.02	\$22.03	0	\$0.00	\$22.91	44,639,900	M	Buy
EBAY	\$61.62	\$61.74	100	\$6,162.00	\$63.26	2,747,500	M	Buy Sell
VITR	\$5.97	\$5.98	100	\$597.00	\$6.08	249,400	H	Buy
TYXX	\$56.88	\$56.68	100	\$5,688.00	\$56.68	28,763	L	Buy
BEAS	\$55.76	\$55.77	100	\$5,576.00	\$50.01	3,767,900	L	Buy
MSFT	\$71.11	\$71.12	100	\$7,111.00	\$71.66	2,100,030	L	Buy
Total Value:				\$6,162.00	Approx. Stock Risk 2.25			

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

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

Symbol	Bid	Ask	Qty	Value	Last	Volume	Risk
DJIA	11,010	11,010	--	--	11,000	162,811,800	L
NASDAQ	2,254	2,254	--	--	2,285	1,315,043,000	L
CSCO	\$22.02	\$22.03	0	\$0.00	\$22.91	44,639,900	M <input type="button" value="Buy"/>
EBAY	\$61.62	\$61.74	100	\$6,162.00	\$63.26	2,747,500	M <input type="button" value="Buy"/> <input type="button" value="Sell"/>
VITR	\$5.97	\$5.98	100	\$597.00	\$6.08	249,400	H <input type="button" value="Buy"/> <input type="button" value="Sell"/>
TYXX	\$56.88	\$56.68	100	\$5,688.00	\$56.68	28,763	L <input type="button" value="Buy"/> <input type="button" value="Sell"/>
BEAS	\$55.76	\$55.77	100	\$5,576.00	\$50.01	3,767,900	L <input type="button" value="Buy"/> <input type="button" value="Sell"/>
MSFT	\$71.11	\$71.12	100	\$7,111.00	\$71.66	2,100,030	L <input type="button" value="Buy"/> <input type="button" value="Sell"/>

Total Value: \$25,134.00 Approx. Stock Risk 2.25

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

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

Symbol	Bid	Ask	Qty	Value
DJIA	11,010	11,010	--	--
NASDAQ	2,254	2,254	--	--
EBAY	\$61.62	\$61.74	100	\$6,162.00
VITR	\$5.97	\$5.98	100	\$597.00
TYXX	\$56.88	\$56.68	100	\$5,688.00
BEAS	\$55.76	\$55.77	100	\$5,576.00
MSFT	\$71.11	\$71.12	100	\$7,111.00

Total Value: \$25,134.00

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

Company Profiles Portlet

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

The Company Profiles Portlet demonstrates Content Query tags.

Java Source: none

JSP Source: sampleportal/sampleportal/portlets/profile

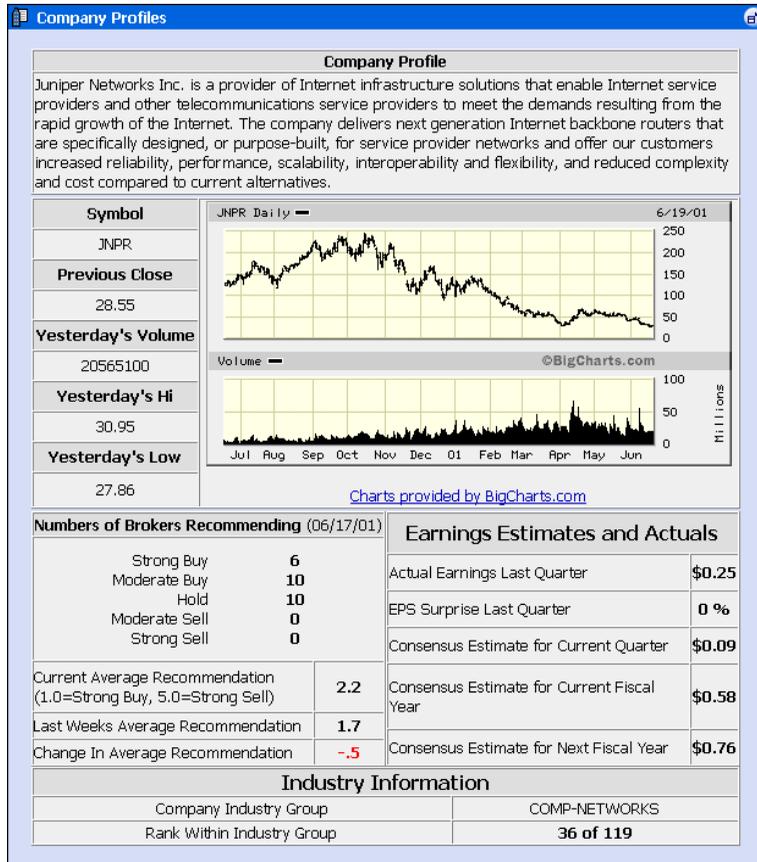
1. If you are not already logged in as Visitor 4, log in under that name.
2. In the Company Profiles portlet, click Juniper Networks, as shown in [Figure 5-12](#).

Figure 5-12 Company Profiles Portlet (Visitor 4)



The portlets expands, as shown in [Figure 5-13](#).

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



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

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

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



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

Figure 5-15 College Fund and Avitek IRA Campaigns



5. Logout as Visitor 4.

6 Newsletter Portlets

The Newsletter portlets show an example of collaborative Content Management. The particular Newsletter portlet displayed depends on the visitor's group membership. These portlets provide the ability for financial advisors to create newsletters that can then be approved and delivered by a manager (approver) to the appropriate visitor based on personalization. The Newsletter portlets use the BEA Content Management reference implementation and native Content Management capabilities. For more information, see "[Creating and Managing Content](#)" in *Guide to Building Personalized Applications*.

The three types of Newsletter portlets are listed below:

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

Newsletters Portlet (for Investors)

Visitors 4–7 belong to the Avitek group as investors. The Newsletter portlet for investors contains a list of newsletters created by the particular visitor's financial advisor. This portlet demonstrates providing customized content through Service Provider Interface (SPI) implementation and Content Selectors. For more information about Content Selectors, see "[Working with Content Selectors](#)" in the *Guide to Building Personalized Applications*.

Java Source: examples/sampleportal/newsletter

JSP Source: sampleportal/sampleportal/portlets/newsletter

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

1. Login as “visitor7”.
2. Click one of the newsletters, as shown in [Figure 6-1](#).

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



The portlet expands to show the content of the select newsletter, as shown in [Figure 6-2](#).

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



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

MyNewsletters Portlet (for Financial Advisors)

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

Java Source: examples/sampleportal/newsletter

JSP Source: sampleportal/sampleportal/portlets/newsletter

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

1. Login as “visitor2”. The MyNewsletters portlet contains a list of newsletters created by Visitor 2, as shown in [Figure 6-3](#).

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



MyNewsletters	
Create Newsletter	
Title	Status
BEA Upgraded to Strong Buy	Approved
BEA a Hot Stock to Watch	Approved
Dow Ends Up 39 Nasdaq Rises 26	Approved
Ford Workers To Rally In Washington	Approved
New Mutual Funds	Approved
P&G report record earnings	Approved
Stocks Fall in Nasdags Worst Week	Approved
BEA contemplating a switch to NYSE	In Review
Basic material shares deserve more attention	In Review
DOW slowing down from economy	In Review
Why The GE-Honeywell Merger Will Fly	In Review

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

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



3. Enter text in the Title, Summary, and Commentary fields; select the language and audience from the corresponding drop lists; and then click the Create button. The newsletter is added to the list, as shown in Figure 6-8.

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



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

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

Review Newsletters Portlet (for Approvers)

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

Java Source: examples/sampleportal/newsletter

JSP Source: sampleportal/sampleportal/portlets/newsletter

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

1. Login as “visitor1”. The Newsletter portlet for the approver contains a list of newsletters created by the financial advisors, as shown in [Figure 6-6](#)

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



Title	Author	Status
BEA contemplating a switch to NYSE	Jane Doe	In Review
Basic material shares deserve more attention	Jane Doe	In Review
DOW slowing down from economy	Jane Doe	In Review
Why The GE-Honeywell Merger Will Fly	Jane Doe	In Review
BEA Upgraded to Strong Buy	Jane Doe	Approved
BEA a Hot Stock to Watch	Jane Doe	Approved
Dow Ends Up 39 Nasdaq Rises 26	Jane Doe	Approved
Ford Workers To Rally In Washington	Jane Doe	Approved
New Mutual Funds	Jane Doe	Approved
P&G report record earnings	Jane Doe	Approved
Stocks Fall in Nasdaqs Worst Week	Jane Doe	Approved

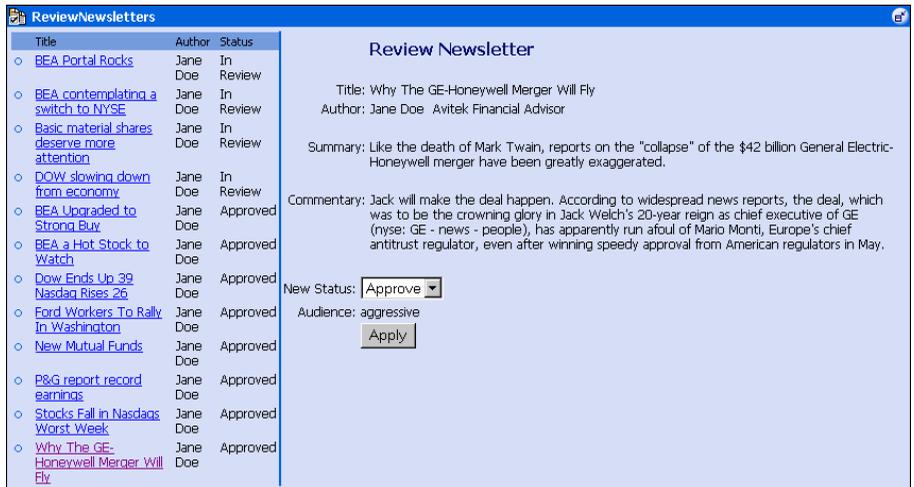
2. Click a newsletter link with an *In Review* status. The portlet expands so that you can read the newsletter and change its status, as shown in [Figure 6-7](#).

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



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

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



4. To return the portlet to its original size, click the Unmaximize button.
5. Logout as Visitor 1.

7 Miscellaneous Portlets

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

- [Email Portlet](#)
- [What's Hot Portlet](#)
- [My Work and Team Work Portlets](#)
- [Customer Service Portlet](#)

Email Portlet

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

Java Source: `examples/sampleportal/email`

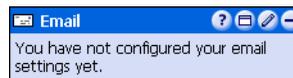
JSP Source: `sampleportal/sampleportal/portlets/email`

Note: Before you can set up the Email portlet, you must have a valid email address in the selected visitor's user profile.

1. If you have *not* entered a valid email address in any visitor's user profile, complete the four steps below; otherwise go to step 2.
 - a. Log in as any visitor.

- b. In the Quick Links portlet, click Update Profile. The Edit Your Account page appears.
 - c. Enter a valid email address in the Email Address field.
 - d. Click the Save button. The Home page appears.
2. To configure the Email portlet, complete the following directions:
 - a. In the Email portlet, click the Edit button, as shown in [Figure 7-1](#).

Figure 7-1 Email Portlet—Not Configured



- b. In the expanded Email portlet, fill in the fields. [Figure 7-2](#) shows an example.

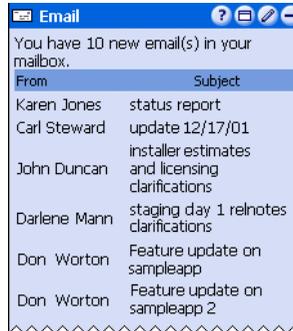
Figure 7-2 Email Portlet—Edit

A screenshot of a web browser window titled "Email". The window contains a form for configuring email settings. The form has a blue header and a light blue body. The text "Enter the following fields to configure your mailbox:" is at the top. Below this are four input fields: "Host Name:" with the value "radium", "User Id:" with the value "mcurie", "Password:" with a masked value "*****", and "Refresh (minutes):" with a dropdown menu set to "5". There is a checkbox labeled "Do not save email settings." which is unchecked. A "Save" button is at the bottom left. On the right side, there is a note: "If you choose not to keep email settings permanently, no settings will be stored in database, and if applicable, settings that are previously stored in database will be removed from database. Password is stored in database using simple encryption." The window has a blue title bar with a question mark icon and a refresh icon.

- c. Click the Save button, and then click the Finished button.

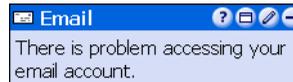
If you have entered the correct information, you should see your new emails in the Email portlet, as shown in [Figure 7-3](#).

Figure 7-3 Email Portlet—New Email



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

Figure 7-4 Email Portlet—Improperly Configured



3. Log out of the portlet.

What's Hot Portlet

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

Java Source: `examples/sampleportal/whatshot`

JSP Source: `sampleportal/sampleportal/portlets/whatshot`

To learn about the What's Hot portlet, complete the following instructions:

1. Login as “visitor4”. The portlet appears as shown in [Figure 7-5](#). The right column indicates the number of times that the link for each company has been clicked in the Company Profiles portlet.

Figure 7-5 What’s Hot—Citigroup, 3 Counts



Title	Counts(updated each minute)
Juniper Networks	12
General Electric	4
Exxon Mobil	3
Citigroup	→ 3
College Planning Campaign	2
Macromedia	2
Wells Fargo	2
IRA Campaign	1
Micron Technology	1

Total: 30

[View as Excel spreadsheet](#)

2. Notice the number of counts for any company. For example Citigroup has a count of three, as indicated by the red arrow in [Figure 7-5](#).
3. Go to the Company Profiles portlet and click any company ([Figure 7-6](#)).

Figure 7-6 Company Profiles Portlet



4. After the Company Profiles portlet expands, click the Unmaximize button to return the portlet to its original size.
5. Now go back and look at the What’s Hot portlet. Notice that the number of counts for the company you picked increments by one. For example, Citigroup now has a count of four hits, as shown in [Figure 7-7](#).

Figure 7-7 What's Hot—Citigroup, 4 Counts

Title	Counts(updated each minute)
Juniper Networks	12
General Electric	4
Exxon Mobil	3
Citigroup	→ 4
College Planning Campaign	2
Macromedia	2
Wells Fargo	2
IRA Campaign	1
Micron Technology	1
Total: 30	
View as Excel spreadsheet	

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

Figure 7-8 What's Hot—Excel Spreadsheet

	A	B	C
1	Click Activity		
2	Title	Counts	
3	Juniper Networks	12	
4	General Electric	4	
5	Exxon Mobil	3	
6	College Planning Campaign	2	
7	Macromedia	2	
8	Citigroup	2	
9	Wells Fargo	2	
10	IRA Campaign	1	
11	Micron Technology	1	
12			

- To return to the portlet, click the browser Back button.

My Work and Team Work Portlets

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

Java Source: `examples/sampleportal/collaboration`

JSP Source: `sampleportal/sampleportal/portlets/collaboration`

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

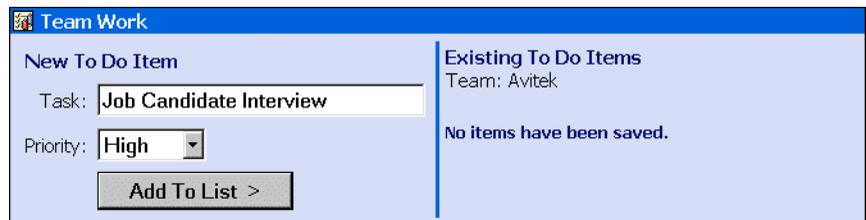
1. Login in as “visitor4”.
2. In the Team Work portlet, click the Edit button, as shown in [Figure 7-9](#).

Figure 7-9 Team Work Portlet—No Items Saved



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

Figure 7-10 Team Work Portlet—New To Do Items



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

Figure 7-11 Team Work Portlet—Item Added



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

Figure 7-12 Team Work Portlet—Items Added



6. Log off as Visitor 4 and login as “visitor1”. The Team Work portlet for Visitor 1 now shows the items entered by Visitor 4.
7. In the Visitor 1 Team Work portlet, click one of the check boxes, and then click the Update button. Figure 7-13 shows an example.

Figure 7-13 Team Work Portlet—Item Checked



8. Log off as Visitor 1 and login as “visitor4”. The Team Work portlet for Visitor 4 now shows the checked item entered by Visitor 1.
9. Log off as Visitor 4.

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

Customer Service Portlet

The Customer Service portlet demonstrates EJB 2.0 implementation and integration with the J2EE Connector Architecture (JCA) sample database adaptor provided with WLS 6.1. The Customer Service portlet has two views: the Individual view, where visitors can see only their service requests and add new requests, and the Service Representative view, where all service requests from every group member are displayed.

Java source:

sampleportal/sampleportal/WEB-INF/src/examples/sampleportal/customerservice

sampleportal/src/examples/sampleportal/customerservice

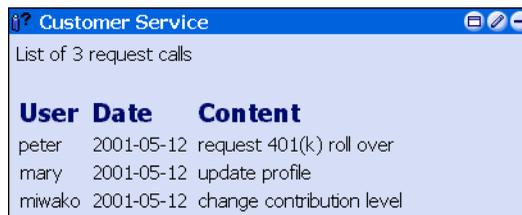
JSP source: sampleportal/customerservice

To learn more about the Customer Service portlet, complete the following instructions:

1. Login in a “visitor5”. The Customer Service portlet appears as shown in [Figure 7-14](#).

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

Figure 7-14 Customer Service Portlet—Default (Visitor 5)



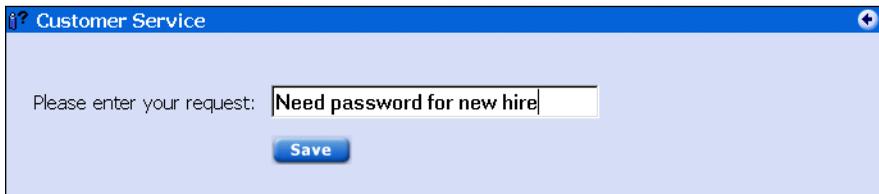
The screenshot shows a web browser window titled "Customer Service". Below the title bar, it says "List of 3 request calls". There is a table with three columns: "User", "Date", and "Content". The table contains three rows of data:

User	Date	Content
peter	2001-05-12	request 401(k) roll over
mary	2001-05-12	update profile
miwako	2001-05-12	change contribution level

2. Logout as Visitor 5 and then login as “visitor1”. The Customer Service Portlet appears as shown in [Figure 7-15](#).

Figure 7-15 Customer Service Portlet—Default (Visitor 1)

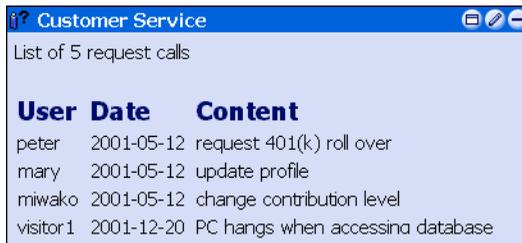
- In the Visitor 1 Customer Service portlet, click the Edit button. The portlet expands as shown in [Figure 7-16](#).

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

- Enter a request, click the Save button, and then click the Finished button. The portlet now shows the service request, as shown in [Figure 7-17](#).

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

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

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

This completes the Tour of the Avitek Financial Sample Portal.

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