STELLENT™

Stellent EJB Integration for WebLogic® Personalization Server

JSP-EN2-610

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OVERVIEW

INTRODUCTION

The information contained in this guide is based on Stellent™ Content Server 6.1. The information is subject to change as the product technology evolves and as hardware and operating systems are created and modified.

Due to the technical nature of browsers, web servers, and operating systems, Stellent, Inc. cannot warrant compatibility with all versions and features of third-party products.

This chapter contains these topics:

❖ About this Guide

❖ Stellent Product Distinctions

❖ If You Need Assistance

ABOUT THIS GUIDE

This guide discusses the steps required to integrate a deployed Stellent Enterprise JavaBean (EJB) with WebLogic Personalization Server and configure a portal that accesses Stellent Content Server.

Audience

This guide is intended for application developers who need to access Stellent Content Server functions from a JSP on WebLogic Personalization Server using the Stellent EJB.

Conventions

The following conventions are used throughout this guide:

❖ The notation *<install_dir>/* is used throughout this guide to refer to the location on your system where Stellent Content Server product is installed.

❖ Forward slashes (/) are used to separate the directory levels in a path name. A forward slash will always appear after the end of a directory name.

❖ Notes, technical tips, important notices, and cautions use these conventions:

Symbol	Description
	This is a note. It brings special attention to information.
	This is a tech tip. It identifies information that can be used to make your tasks easier.

Symbol	Description
	This is an important notice. It identifies a required step or critical information.
	This is a caution. It identifies information that might cause loss of data or serious system problems.

STELLENT PRODUCT DISTINCTIONS

In this guide, the term *content server* is used generically to refer to both the Content Server and the Collaboration Server. The following table lists the distinctions of these two Stellent content management solutions:

Stellent Content Management Product and Feature Distinction

Product	Description
Stellent Content Server	A fully functional content management system providing end-to-end content management and personalized delivery of that content.
Stellent Collaboration Server	A fully functional content management system providing end-to-end content management and personalized delivery of that content. Additionally, a Stellent Collaboration Server license enables project-level security for collaborative authoring environments.

IF YOU NEED ASSISTANCE

The Stellent family of products is backed by a full range of support options to meet every business need. The service philosophy is to keep your Stellent environment fully operational by providing the best information and solutions available. The Stellent product support team consists of highly trained product engineers who excel at resolving complex technical issues. Every customer inquiry is tracked and managed through automated systems.

Important: The support options that are available for specific systems may vary, depending on the applicable service and maintenance agreements. Please refer to your contract for the support details for your Stellent system.

Support Options

You can choose from the following three support programs offered by Stellent:

❖ **Standard Maintenance and Support Program:** The standard support program is available during standard business hours domestically and internationally (Monday through Friday from 8 am to 5 pm for every time zone). It provides telephone and e-mail support for troubleshooting, bug fixes, call escalation, modifications, enhancements, and updates.

❖ **SDK Developer Support Program:** The SDK support program is available Monday through Friday from 8 am to 5 pm (Central Time in the USA, which is -6 hours from GMT). It provides telephone and e-mail support for customers who wish to use the Software Developer's Kit (SDK) to customize their Stellent systems.

❖ **Extended Support Program:** The extended support program provides the standard support services 24 hours a day and 7 days a week.

Note: Value Added Resellers (VARs) and Original Equipment Manufacturers (OEMs) may have different support programs in place.

Before Contacting Support

When you call or send e-mail, please provide the following information:

❖ Nature and severity of the problem.

❖ Stellent product and version.

❖ Serial number of the registered Stellent product.

❖ Operating system and version.

❖ Name and telephone number of the person the support engineers should contact if they need to call back.

In addition, depending on the situation, it may be helpful to know the following:

❖ Database type and version.

❖ Web browser type and version.

❖ Web server type and version.

Telephone

Technical support is available from the Support Hotline at 1-888-688-TECH (1-888-688-8324). The Support Hotline is accessible toll-free world-wide.

E-Mail

The Stellent support e-mail address is *support@stellent.com*. It is available for all technical support questions.

Internet

Technical support is also available through the Internet at
http://support.stellent.com. You will be prompted for a username and password.
To obtain a username and password, contact the Support Hotline at
1-888-688-TECH (1-888-688-8324).

CONCEPTUAL INFORMATION

INTRODUCTION

This chapter contains these topics:

❖ Product Overview

❖ Integration Architecture

PRODUCT OVERVIEW

The Stellent ContentServerBean Enterprise JavaBean (EJB) has these qualities:

❖ Provides the functionality to call Stellent services from within a J2EE Enterprise JavaBean environment.

❖ Is called from a J2EE environment application server, but executes the function completely in the Stellent environment.

❖ Uses specific application servers as the J2EE compliant Enterprise JavaBean container.

❖ Provides robust connectivity to Stellent Content Server using J2EE compliant EJB architecture.

❖ Enables integration of Stellent Content Server into extended multiple-tier applications.

The ContentServerBean EJB integrated with the WebLogic Personalization Server allows users to use the BEA WebLogic Commerce Server to access content stored in Stellent Content Repository. Stellent content retrieval for BEA provides a complete sample web site stored in the Stellent Content Repository. Based on the content source, rules, and property sets, the portal queries the content repository for content associated with a particular configuration of metadata and the component repository returns the matching content to the WebLogic Commerce Server portal.

Important: Do not use this guide for a WebLogic Portal Server instance. Refer to *Installing and Configuring Stellent Portlets on WebLogic Portal Server* for information on integrating Stellent Portlets with BEA WebLogic Portal Server to access Stellent Content Server.

INTEGRATION ARCHITECTURE

Integration with BEA WebLogic Server

Integration with WebLogic Server takes place through the Stellent ContentServerBean EJB. By instantiating the EJB within WebLogic Server, the full Stellent API becomes available. This allows developers to programmatically check content in and out, perform searches, and display results from within other applications running on WebLogic. Stellent has the ability to provide content in multiple delivery formats allowing users to access content from any device. Stellent users can check in and maintain code, campaigns, user profiles, and configuration files.

Integration with WebLogic Server

The Stellent ContentServerBean provides access to Stellent content from applications running on WebLogic Server.

Integration with WebLogic Personalization Server

In addition to using the Stellent ContentServerBean EJB interface, WebLogic Personalization Server (WLPS) users can access Stellent using the WLPS Document Service Provider Interface (SPI). This documented SPI allows developers to make calls to Stellent from within WLPS. This simplified interface allows WLPS users and developers to retrieve Stellent content based upon full text or metadata searches.

Integration with WebLogic Personalization Server

In addition to integrating with WebLogic Server, Stellent also provides direct integration with WebLogic Personalization Server.

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INTEGRATION PROCEDURE

INTRODUCTION

This chapter provides information required to integrate a deployed Stellent™ ContentServerBean EJB with WebLogic® Personalization Server.

This chapter contains these topics:

❖ Integration Prerequisites

❖ WebLogic Personalization Server Integration

❖ Uninstall Procedure

❖ Administration Notes

INTEGRATION PREREQUISITES

These components must be installed prior to the integration of the Stellent ContentServerBean EJB with WebLogic Personalization Server:

❖ Xpedio™ Content Server 5.0 or Stellent™ Content Server 6.1.
  Refer to the *Stellent Content Server Installation Guide*.

❖ Stellent™ ContentServerBean 6.1
  Refer to the *Java Server Page and JavaBean Guide*.

❖ WebLogic® Server 6.0 with Service Pack 2

❖ WebLogic® Commerce Server 3.5 and
  WebLogic® Personalization Server 3.5

❖ BEA E-Business Control Center 1.1
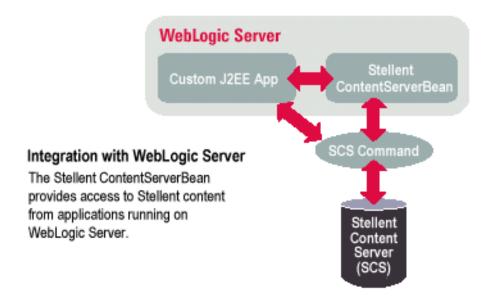
❖ BEA Service Pack 1 for E-Business Control Center

Important: Do not use this guide for a WebLogic Portal Server instance. Refer to *Installing and Configuring Stellent Portlets on WebLogic Portal Server* for information on integrating Stellent Portlets with BEA WebLogic Portal Server to access Stellent Content Server.

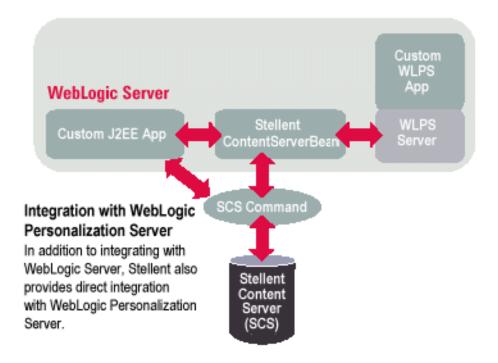**Important:** Deploy the Stellent ContentServerBean EJB prior to following the integration instructions in this guide. Refer to the *Java Server Page and JavaBean Guide* for additional information.

ContentServerBean Software

The ContentServerBean software and documentation is included on the Stellent Content Server CD-ROM in the *J2ee* folder. This folder is located on the CD-ROM within the *extras* directory.

Of particular interest:

❖ The ContentServerBean documentation is located in the *docs* sub-directory.

❖ The ContentServerBean JAR file (*IdcEjb.jar)* is located in the *ejb* sub-directory.

❖ The WebLogic Personalization Server Integration Guide Test Client is located in the *ejb* sub-directory.

WebLogic Integration Software

The Weblogic Integration software and demo is provided in the *idc-beasys* ZIP file available by download from the Stellent website or from Stellent customer support. See *If You Need Assistance* (page 1-4) for contact information.

WEBLOGIC PERSONALIZATION SERVER INTEGRATION

Important: Do not use this guide for a WebLogic Portal Server instance. Refer to *Installing and Configuring Stellent Portlets on WebLogic Portal Server* for information on integrating Stellent Portlets with BEA WebLogic Portal Server to access Stellent Content Server.

Important: Deploy the Stellent ContentServerBean EJB prior to following the integration instructions in this guide. Refer to the *Java Server Page and JavaBean Guide* for additional information.

These are the steps for integrating the Stellent ContentServerBean EJB with WebLogic Personalization Server:

1. Perform the required preliminary setup.

2. Edit the Properties file.

3. Edit the Set-Environment file.

4. Run the integration installation file.

5. Unpackage the User Permissions component.

6. Start the Stellent and WebLogic servers.

7. Confirm the connection and enable Schema search entry.

Perform the Preliminary Setup

Follow these steps to add the Stellent WebLogic Integration software and demo to your system:

1. Download the *idc-beasys.zip* file from the Stellent website or abtain a copy from Stellent customer service. See *If You Need Assistance* (page 1-4) for contact information.

2. Create a *idc-beasys* directory on your primary system and unzip the contents of the *idc-beasys.zip* file to that directory.

   For example:

   ```
   C:/idc-beasys
   ```

Edit the Properties File

Follow these steps to edit the referenced properties:

1. In the *idc-beasys* directory, open the *idc_beasys.properties* file in a text-only editor.

2. Confirm that the *xcs.jndiname* entry is set to IdcEjb.

   For example:

   ```
   xcs.jndiname=IdcEjb
   ```

3. Confirm that the *xcs.url* is correct. If Stellent Content Server was installed on a different host or a different port than the default, edit this entry:

   ```
   xcs.url=socket:localhost:4444
   ```

4. Confirm that the *java.naming.provider.url* is correct. If WebLogic Server
    was installed on a different host or a different port than the default, edit this
    entry:

    ```
    java.naming.provider.url=t3://localhost:7001
    ```

5. Save the *idc_beasys.properties* file.

Edit the Set-Environment File

Follow these steps to append to the classpath:

1. In the WebLogic Commerce Server *bin* directory, open the *set-
    environment.bat* file in a text-only editor.

    For example (if defaults were accepted on installation):

    ```
    C:/bea/WebLogicCommerce3.5/bin/win32/set-environment.bat
    ```

2. Reference the WebLogic CLASSPATH entry.

    For example:

    ```
    REM ----------- WebLogic CLASSPATH -----------
    SET CLASSPATH=%WLCS_CLASSPATH%;%JAVA_CLASSPATH%;%DB_CLASSPATH%
    ```

3. Append the CLASSPATH to include the path to the
    tmp_ejb<hostname><WLS port number>/IdcEjb directory.

    For example:

    ```
    ;%WEBLOGIC_HOME%\tmp_ejbmainserver7001\IdcEjb
    ```

    Sample entry (one line):

    ```
    SET CLASSPATH=%WLCS_CLASSPATH%;%JAVA_CLASSPATH%;%DB_CLASSPATH%;
    %WEBLOGIC_HOME%\config\mydomain\applications\IdcEjb.jar;
    %WL_COMMERCE_HOME%\lib\idc-beasys.jar;
    %WEBLOGIC_HOME%\tmp_ejbmainserver7001\IdcEjb
    ```

4. Save the *set-environment.bat* file.

Run the Integration Installation File

Perform these steps from the command prompt:

1. Change to the *idc-beasys* directory.

   For example:

   ```
   C:/idc-beasys
   ```

Note: It is assumed that an *idc-beasys* directory was created during preliminary setup, and the contents of the *idc-beasys.zip* file were placed in that directory.

2. Press **Enter**.

3. Run the *install* file located in the *idc-beasys* directory.

   For Windows:

   ```
   install.bat
   ```

   For UNIX:

   ```
   install.sh
   ```

4. Press **Enter**.

Note: The installation references the JAVA_HOME directory. If you are prompted to provide that directory, set JAVA_HOME to the JDK directory located in the WebLogic Server.

   For example (if defaults were accepted on installation):

   ```
   set JAVA_HOME=C:/bea/jdk130
   ```

5. Enter the complete path to the WebLogic Commerce Server directory or accept the default entry of C:/bea/WebLogicCommerce3.5.

Important: Do not accept the provided default entries if different directory locations were specified or if different directory names were entered during the installation of WebLogic Server or WebLogic Commerce Server.

6. Press **Enter**.

7. Enter the complete path to the Stellent web root URL location or accept the the default entry of *http://localhost/stellent/*.

Note: Depending on your Content Server version, the default directory is either *stellent* or *xpedio*.

8. Press **Enter**.

9. Enter the complete path to the ContentServerBean JAR file located in the *applications* sub-directory within the WebLogic Admin Domain Name directory or accept the default entry of C:/bea/wlserver6.0/config/ mydomain/applications/IdcEjb.jar

10. Press **Enter**.

11. Enter the WebLogic system password you defined on installation of WebLogic Server.

12. Press **Enter**.

The required configuration files, property files, and environment files are copied or modified.

Unpackage the User Permissions Component

Use the Stellent Component Wizard to unpackage the User Permissions Component. You can launch the Component Wizard from a command prompt or from the *Start* menu on Windows. Login using the Stellent system administrator username and password.

For example (from a command prompt):

```
C:/stellent/bin/ComponentWizard.exe
```

Follow these steps to unpackage the User Permissions Component:

1. Launch the Component Wizard.

The Component Wizard main menu and the Component List are displayed.

2. Close the Component List.

3. From the Component Wizard main menu, select **Options—Unpacka*ge***.

4. On the Unpackage screen, click **Select**.

5. Browse to the *Component_for_Xpedio_WLPS.zip* file located in the *idc-beasys* folder, and click **Open**.

6. On the Unpackage screen, click **OK**.

7. In the Custom Resource Definition area, select *bea_integration_service*.

8. From the Component Wizard main menu, select **Options—Enable**.

9. Select **Options—Exit**.

Note: See *Defining User Permission*s (page 3-12) for additional information.

Start the Stellent and WebLogic Servers

Stop any active servers and then follow these steps to restart the servers:

1. Start Stellent Content Server from a command prompt (or from the *Start* menu on Windows).

2. Start WebLogic Server from a command prompt (or from the *Start* menu on Windows).

3. Start WebLogic Commerce Server from a command prompt (or from the *Start* menu on Windows).

Confirm the Connection and Enable Schema Search Entry

Follow these steps to confirm the connection to the WebLogic servers, verify the Schema search type, and enable Schemas:

1. Launch the WebLogic Commerce Server *Content Management Examples* file by defining *http://<webserver>:<port>/examples/content/index.html* in a web browser.

   For example:

   ```
   http://localserver:7501/examples/content/index.html
   ```

Note: The examples in this directory demonstrate how to use the Content Management component of WebLogic Content Server to query, retrieve and display content and documents, using both regular Java or the CM JSP tag library.

2. Click the *Schema search and display* link.
3. Enable the **ShowExplicit** option.
4. Click **Show Schemas**.
5. Reference the Schema entry:

   ```
   Schema: Document / IdcDefaultSchema
   ```

6. Confirm that IdcDefaultSchema is assigned as the schema.

Tech Tip: If IdcDefaultSchema is not assigned as the schema, ensure that the classpath entries in the set-environment.bat file are correct, that bea_integration_service is enabled, and that the servers were stopped and restarted.

UNINSTALL PROCEDURE

When the *install.bat (install.sh for UNIX)* file was run, several files were copied into the *WebLogic* directories. To perform an uninstall, two of these files need to be removed form the WebLogic directories and one file needs to be edited.

Follow these uninstall procedures:

1. In the WebLogic Commerce Server directory, remove the *idc_beasys.properties* file.

    For example (if defaults were accepted on installation):

    ```
    C:/bea/WebLogicCommerce3.5/idc-beasys.properties
    ```

2. In the WebLogic Commerce Server *lib* directory, remove the *idc_beasys.jar* file.

    For example (if defaults were accepted on installation):

    ```
    C:/bea/WebLogicCommerce3.5/lib/idc-beasys.jar
    ```

3. In the WebLogic Commerce Server *bin* directory, open the *set-environment.bat* file in a text-only editor.

    For example (if defaults were accepted on installation):

    ```
    C:/bea/WebLogicCommerce3.5/bin/win32/set-environment.bat
    ```

4. Reference the WebLogic CLASSPATH entry.

    For example:

    ```
    REM ----------- WebLogic CLASSPATH -----------
    SET CLASSPATH=%WLCS_CLASSPATH%;%JAVA_CLASSPATH%;%DB_CLASSPATH%
    ```

5. In the CLASSPATH, delete these references:

    ❖ IdcEjb.jar

    ❖ idc-beasys.jar

    ❖ IdcEjb

For example:

```
%WEBLOGIC_HOME%\config\mydomain\applications\IdcEjb.jar;
%WL_COMMERCE_HOME%\lib\idc-beasys.jar;
%WEBLOGIC_HOME%\tmp_ejbmainserver7001\IdcEjb;
```

6. Save the *set-environment.bat* file.

7. Restart the WebLogic servers.

ADMINISTRATION NOTES

Document Provider and Stellent Interfaces

BEA has published a Document Provider interface, which includes methods for accessing content. Our integration with Stellent places the Stellent Content Management System as the back end content management system from which content is served up through WebLogic.

You can use the published Document Provider interface from WebLogic Personalization Server to build your custom application.

Note: For more information on using the Document Provider interface, refer to the the BEA WebLogic Server Documents website at: *http://edocs.bea.com*.

Through the integration, your custom application can serve up content from the Stellent system. To contribute or modify content or metadata, you must use the interface provided by Stellent. If you have a standard installation of Stellent, the Stellent home page can be referenced at:

```
http://<stellent_dir>/stellent
```

Note: Refer to the *Stellent Content Server Administration Guide* for additional information.

To administer Stellent Content Server, you can use the link on the WebLogic Personalization Server administration page:

```
http://<webserver><port>/tools/index.jsp
```

Defining User Permissions

Stellent has a database of users with roles-based permissions. The search results returned by Stellent depend on what permissions are granted to the Stellent user issuing the query. WebLogic also maintains a list of users and security configuration. These two security systems could be integrated with customization, but in the default installation, they are entirely separate.

After integrating the Stellent ContentServerBean EJB with WebLogic Personalization Server, a WebLogic Personalization Server user may issue a query on content. Queries can be performed on content items using a portlet in which a user can enter any word on which to query Stellent content. These queries are formed in the Java Server Page code, and executed programmatically. When WebLogic Personalization Server executes an Stellent query programmatically, it uses user credentials supplied by a parameter *xcs.user* which is set in the idc_beasys.properties file. By default the user is *sysadmin*, which grants access to all content stored in Stellent Content Server. In a real production system using this integration, the system administrator will want to limit access to content stored in Stellent, by assigning a different Stellent user to this property. Before changing this property file, define the user by using Stellent user administration methods.

Note: Refer to the *Stellent Content Server System Administration Guide* for additional information.

DEMONSTATION PORTAL SETUP

INTRODUCTION

This chapter provides information for the set up of a demonstration portal with the Stellent Configuration Manager. This portal example is a sample application only. While you will want to build your own application using WebLogic Personalization Server, you can use this demonstration portal as a building block.

This chapter contains these topics:

❖ Demonstration Portal Setup

❖ View the Demonstration Portal

DEMONSTRATION PORTAL SETUP

These are the steps for setting up the demonstration portal with WebLogic Personalization Server:

1. Start the Stellent and WebLogic servers.

2. Define new content types in Stellent Content Server.

3. Load content for the demonstation portal.

4. Define portal properties in WebLogic Commerce Server.

5. Create new Segments and Content Selectors.

6. Stop and start the Stellent and WebLogic servers.

Start the Stellent and WebLogic Servers

Follow these steps to start the servers:

1. Start Stellent Content Server from a command prompt (or from the *Start* menu on Windows).

2. Start WebLogic Server from a command prompt (or from the *Start* menu on Windows).

3. Start WebLogic Commerce Server from a command prompt (or from the *Start* menu on Windows).

Define New Content Types in Stellent Content Server

Use the Stellent Content Server Configuration Manager to define the new content types. You can launch the Configuration Manager from a command prompt, from the *Start* menu on Windows, or from a web browser using the Stellent Content Server user interface by clicking **Administration** and then **Configuration Manager**. Login using the Stellent system administrator username and password.

For example (from a command prompt):

```
C:/stellent/bin/IntradocApp.exe ConfigMan
```

Follow these steps to define the new content types:

1. Launch the Configuration Manager.

2. On the Configuration Manager screen, select the *Content Types* tab.

3. Click **Add**.

4. Add the new content type:

   Name: **news**

   Description: **News**

   GIF: **report.gif**

5. Click **OK**.

6. Click **Add**.

7. Add the new content type:

   Name: **event**

   Description: **Personalized Events**

   GIF: **multimedia.gif**

8. Click **OK**.

9. Select the Information Fields tab.

10. Click **Add**.

11. Add the field name:

    Field Name: **EventType**

12. Click **OK**.

13. On the *Add Custom Info Field* screen, add the initial field information:

    Field Caption: **EventType**

    Field Type: **Text**

14. Enable the Option List check box.

15. Click **Edit**.

16. Enter *Option List Keys* information:

    ```
    [empty line]
    Company Event
    HR Event
    Industry Event
    Partner Event
    ```

17. Click **OK**.

18. On the *Add Custom Info Field* screen, click **OK**.

19. On the Information Fields tab, click **Add**.

20. Add the field name:

    Field Name: **heading**

Note: The field name *heading* is lower case.

21. Click **OK**.

22. On the *Add Custom Info Field* screen, add the initial field information:

    Field Caption: **Heading**

Field Type: **Text**

23. Enable the Option List check box.

24. Click **Edit**.

25. Enter *Option List Keys* information:

    ```
    [empty line]
    Computer Software
    Financial Services
    Government
    Healthcare Services
    ```

26. Click **OK**.

27. On the *Add Custom Info Field* screen, click **OK**.

28. Click **Update Database Design**.

29. Click **OK**.

30. From the main menu select **Options—Exit** to close the Configuration Manager.

Load Content for the Demonstration Portal

Use the Stellent Batch Loader utility to load content for the demonstration portal. You can launch the Batch Loader utility from a command prompt or from the *Start* menu on Windows. Login using the Stellent system administrator username and password.

For example (from a command prompt):

```
C:/stellent/bin/BatchLoader.exe
```

Follow these steps to load content for the sample portal:

1. Launch the Batch Loader utility.

2. On the Batch Loader screen, click **Browse** and navigate to the *idc-beasys* directory, locate the *Ravenna* sub-folder, and select the *batchinsert.txt* file. Alternatively, enter the complete directory to the *batchinsert.txt* file.

   For example:

   ```
   C:/idc-beasys/Ravenna/batchinsert.txt
   ```

Note: It is assumed that the integration procedures were followed, a *idc-beasys* directory was created, and the contents of the *idc-beasys.zip* file were placed in that directory.

3. Click **Open**.

4. Click **Load Batch File**.

5. Click **OK**.

6. From the main menu select **Options—Exit** to close the Batch Loader.

Define Portal Properites in WebLogic Commerce Server

Use the WebLogic Commerce Server Administrative Tools page to register the new portlets. You can launch the Administrative Tools page from a command prompt, from the *Start* menu on Windows, or by entering the URL for the Administrative Tools Java Server Page in a Web browser. Login using the WebLogic system administrator username and password.

These steps are required to to define the new portal properties:

1. Create a new property.

2. Create new users.

3. Create new groups.

4. Assign users to groups.

5. Create new portlets.

6. Edit the portal.

Create a New Property

1. Launch the WebLogic Commerce Server Administrative Tools.

2. On the *Administration Tools Home Page*, click **Property Set Management**.

3. Reference *User Property Sets,* and click the the **exampleportal** link.

4. Reference the *Properties* line, and click **Create**.

5. On the *Create Properties* form, enter this information:

    Property Name: **user_group**

    Description: **User Group**

    Type: **Text**

    Selection Option: **Single**

    Creation Category: **Restricted**

6. Click **Create**.

    The response "Property creation was successful" will display.

7. Click **Back**.

8. Reference the *user_group* line, and click **Edit**.

9. Reference the Property Values line, and click **Edit**.

10. On the *Create New Values* form, enter this information:

    New Value: **Employee**

11. Click **Create**.

12. On the *Create New Values* form, enter this information:

    New Value: **Partner**

13. Click **Create**.

14. Click **Save**.

15. Click **Back**.

16. Reference the *user_group* line. The entries for *Employee* and *Parner* are listed.

17. Click **Finished**.

    This returns you to the *Administration Tools Home Page*.

Create New User

1. On the *Administration Tools Home Page*, click **User Management**.

2. Reference the *Users* section, and click **Create**.

3. On the *Create New Users* form, enter this information:

    Username: **Erica**

    Password: **employee**

    Verify Password: **employee**

    User Type: **User**

4. Click **Create**.

    The response "User 'Erica' created successfuly" is displayed.

5. On the *Create New Users* form, enter this information:

    Username: **Paul**

    Password: **partner**

    Verify Password: **partner**

    User Type: **User**

6. Click **Create**.

    The response "User 'Paul' created successfuly" is displayed.

7. Click **Back**.

This will return you to the *User Management* page.

Create New Groups

1. On the *User Management* page, reference the *Groups* section, and click **Create**.

2. Reference the *Top Level Groups,* and click the "Add a subgroup to top level" icon.

3. On the *Create New Group* form, enter this information:

   Group Name: **Employee**

4. Click **Create**.

   The response "Group 'Employee' created successfuly" is displayed.

5. On the *Create New Group* form, enter this information:

   Group Name: **Partner**

6. Click **Create**.

   The response "Group 'Partner' created successfuly" is displayed.

7. Click **Back**.

8. Click **Finished**.

   This will return you to the *User Management* page.

Assign Users to Groups

1. On the *User Management* page, reference the *Groups* section, and click the **Groups** link.

2. Reference the *Top Level Groups* section, and click the **Employee** link.

3. Reference the *Add/Remove Users From Group* section and click the Add/ Remove (**+/-**) button.

4. On the *Add/Remove* form, enter this information:

Username: **Erica**

5. Click **Save**.

   The response "Group membership has been updated" is displayed.

6. Click **Back**.

7. Click **Finished**.

   This will return you to the *User Management* page.

8. Reference the *Groups* section, and click the **Groups** link.

9. Reference the *Top Level Groups* section, and click the **Partner** link.

10. Reference the *Add/Remove Users From Group* section, and click the Add/
    Remove **(+/-)** button.

11. On the *Add/Remove* form, enter this information:

    Username: **Paul**

12. Click **Save**.

    The response "Group membership has been updated" is displayed.

13. Click **Back**.

14. Click **Finished**.

    This returns you to the *User Management* page.

15. Click **Home**.

    This returns you to the *Administration Tools Home Page*.

Create New Portlets

Follow these steps to set up seven new portlets:

1. On the *Administration Tools Home Page*, click **Portal Management**.

2. Reference the *Portlets* section, and click **Create**.

3. On the *Create a New Portlet* form, enter this information (first portlet):

Portlet Name: **Ravenna Search**

Content URL: **portlets/idc_search.jsp**

Titlebar URL: **titlebar.jsp**

Editable: (disable)

Edit URL: (blank)

Icon URL: **portlets/images/pt_search.gif**

Minimizable: (disable)

Floatable: (disable)

Login Required: (disable)

4. Click **Create**.

The response "Your portlet creation was successful" is displayed.

5. On the *Create a New Portlet* form, enter this information (second portlet):

Portlet Name: **Ravenna Search Results**

Content URL: **portlets/search_results.jsp**

Titlebar URL: (blank)

Editable: (disable)

Edit URL: (blank)

Icon URL: (blank)

Minimizable: ENABLE

Floatable: ENABLE

Login Required: (disable)

6. Click **Create**.

The response "Your portlet creation was successful" is displayed.

7. On the *Create a New Portlet* form, enter this information (third portlet):

   Portlet Name: **Industry Insights**

   Content URL: **portlets/news_index.jsp**

   Titlebar URL: **industry_insights_titlebar.jsp**

   Editable: ENABLE

   Edit URL: **portlets/checkin_new_insight.jsp**

   Icon URL: **portlets/images/**

   Minimizable: (disable)

   Floatable: (disable)

   Login Required: (disable)

8. Click **Create**.

   The response "Your portlet creation was successful" is displayed.

9. On the *Create a New Portlet* form, enter this information (forth portlet):

   Portlet Name: **Industry Insight Viewer**

   Content URL: **portlets/news_viewer.jsp**

   Titlebar URL: (blank)

   Editable: (disable)

   Edit URL: (blank)

   Icon URL: (blank)

   Minimizable: ENABLE

   Floatable: ENABLE

   Login Required: (disable)

10. Click **Create**.

   The response "Your portlet creation was successful" is displayed.

11. On the *Create a New Portlet* form, enter this information (fifth portlet):

    Portlet Name: **New Industry Insight**

    Content URL: **portlets/checkin_new_insight.jsp**

    Titlebar URL: (blank)

    Editable: (disable)

    Edit URL: (blank)

    Icon URL: (blank)

    Minimizable: ENABLE

    Floatable: ENABLE

    Login Required: ENABLE

12. Click **Create**.

    The response "Your portlet creation was successful" is displayed.

13. On the *Create a New Portlet* form, enter this information (sixth portlet):

    Portlet Name: **Upcoming Events**

    Content URL: **portlets/roadrunner.jsp**

    Titlebar URL: **upcoming_events_titlebar.jsp**

    Editable: ENABLE

    Edit URL: **portlets/checkin_new_event.jsp**

    Icon URL: (blank)

    Minimizable: (disable)

    Floatable: (disable)

    Login Required: (disable)

14. Click **Create**.

    The response "Your portlet creation was successful" is displayed.

15. On the *Create a New Portlet* form, enter this information (seventh portlet):

    Portlet Name: **New Upcoming Event**

    Content URL: **portlets/checkin_new_event.jsp**

    Titlebar URL: (blank)

    Editable: (disable)

    Edit URL: (blank)

    Icon URL: (blank)

    Minimizable: ENABLE

    Floatable: ENABLE

    Login Required: ENABLE

16. Click **Create**.

    The response "Your portlet creation was successful" is displayed.

17. Click **Back**.

    This returns you to the *Portal Management* page.

Edit the Portal

Follow these steps to set up the portal with the new portlets:

1. On the *Portal Management* page, click the **exampleportal** link.

   The *Portal: exampleportal* screen is displayed.

2. Reference the *Associated Portlets* section, and click the Add/Remove (**+/-)** button.

   The *Add or Remove Portlets* form displays.

3. On the *Add or Remove Portlets* form, select the **Visible** option for these portlets:

   Ravenna Search

Revenna Search Results

Industry Insights

Industry Insight Viewer

Upcoming Events

New Industry Insight

New Upcoming Events

My To Do List

Group To Do List

4. Select the **Unavail** option for all other portlets.

5. Click **Save**.

    The response "Your add/remove transaction was successful" is displayed.

6. Click **Back**.

7. Reference the *Associated Portlets* section, and click the **New Industry Insights** link.

8. On the *Edit Portlet Display Optionst* form, set these attributes:

    Minimizable: ENABLE

    Floatable: ENABLE

    Default State Minimized: ENABLE

9. Click **Save**.

    The response "Your add/portlet update was successful" is displayed.

10. Click **Back**.

11. Reference the *Associated Portlets* section, and click the **New Upcoming Event** link.

12. On the *Edit Portlet Display Optionst* form, set these attributes:

    Minimizable: ENABLE

Floatable: ENABLE

Default State Minimized: ENABLE

13. Click **Save**.

    The response "Your add/portlet update was successful" is displayed.

14. Click **Back**.

15. Reference the *Layout* section, and click the Add/Remove **(+/-)** button.

    The *Edit Portal Layout* form is displayed.

16. On the *Edit Portal Layout* form, arrange these portlets in Column 1:

    Ravenna Search

    Revenna Search Results

17. On the *Edit Portal Layout* form, arrange these portlets in Column 2:

    Industry Insights

    Industry Insight Viewer

    New Industry Insight

18. On the *Edit Portal Layout* form, arrange these portlets in Column 3:

    Upcoming Events

    New Upcoming Events

    My To Do List

    Group To Do List

19. Click **Save**.

    The response "Your layout change transaction was successful" is displayed.

20. Click **Back**.

21. Click **Finished**.

22. Click **Home**.

This returns you to the *Administration Tools Home Page*.

Create New Segments and Content Selectors

Use the WebLogic E-Business Control Center to create new Segments and new Content Selectors for WebLogic Commerce Server. You can launch the E-Business Control Center from a command prompt or from the *Start* menu on Windows. Login using the WebLogic system administrator username and password.

Note: BEA E-Business Control Center 1.1 and Service Pack 1 for E-Business Control Center should have been installed as part of the installation prerequisites.

These steps are required:

❖ Connect to the server.

❖ Create two new segments.

❖ Create two new Content Selectors.

Connect to the Server

1. Launch the WebLogic E-Business Control Center

2. On the *Server Connection* screen, select the *New Connection* tab and enter the hosttname and port for the example portal and the WebLogic system administrator username and password.

   For example:

   Display Name: **exampleportal**

   Hostname: **localhost**

   Port: **7501**

Username: **system**

Password: **password**

Create New Segments

Follow these steps to create two new Segments:

1. On the *E-Business Control Center Explorer*, click **Segments** to view the currently defined Segments.

2. On the *E-Business Control Center* main menu, select **File—New—Segment**.

   The *Editor* screen is displayed.

3. On the *Editor* screen, enter this information (first Segment):

   Name: **Employee**

   Description: **A user who is an employee.**

4. Click **Create/Edit**.

   The *Customer Segment* screen is displayed.

5. Reference the *Conditions* section, and enable "The visitor has specific characteristics."

6. Reference the *Action* section, and click the **characteristics** link.

   The *Visitor Characteristics* screen is displayed.

7. Reference the *Visitor property set* drop-down list, and select **exampleportal**.

8. Reference the *Visitor property* drop-down list, and select **user_group**.

9. Click **Add**.

   The *Visitor Characteristic Values* screen is displayed.

10. Reference the *Comparison* drop-down list, and select **is equal to**.

11. Reference the *Value* drop-down list, and select **Employee**.

12. Click **Add**.

    This entry is added as a Value phrase:

    ```
    is equal to "Employee"
    ```

13. Enable "Qualifying items must match ALL value phrases."

14. Click **OK**.

    On the *Visitor Characteristics* screen, this entry is added as a Descriptor:

    ```
    exampleportal: user_group is equal to "Employee"
    ```

15. Click **OK**.

16. On the *Customer Segment* screen, click **OK**.

17. On the *Editor* screen, select **Close**.

18. Click **Yes** to save the Customer Segment.

19. On the *E-Business Control Center* main menu, select **File—New—Segment** button.

    The *Editor* screen is displayed.

20. On the *Editor* screen, enter this information (second Segment):

    Name: **Partner**

    Description: **A user who is a partner.**

21. Click **Create/Edit**.

    The *Customer Segment* screen is displayed.

22. Reference the *Conditions* section, and enable "The visitor has specific characteristics."

23. Reference the *Action* section, and click the **characteristics** link.

    The *Visitor Characteristics* screen is displayed.

24. Reference the *Visitor property set* drop-down list, and select
    exampleportal.

25. Reference the *Visitor property* drop-down list, and select **user_group**.

26. Click **Add**.

    The *Visitor Characteristic Values* screen is displayed.

27. Reference the *Comparison* drop-down list, and select **is equal to**.

28. Reference the *Value* drop-down list, and select **Partner**.

29. Click **Add**.

    This entry is added as a Value phrase:

    ```
    is equal to "Partner"
    ```

30. Enable "Qualifying items must match ALL value phrases."

31. Click **OK**.

    On the *Visitor Characteristics* screen, this entry is added as a Descriptor:

    ```
    exampleportal: user_group is equal to "Partner"
    ```

32. Click **OK**.

33. On the *Customer Segment* screen, click **OK**.

34. On the *Editor* screen, select **Close**.

35. Click **Yes** to save the Customer Segment.

Create New Content Selectors

Follow these steps create two new Content Selectors:

1. On the *E-Business Control Center Explorer*, click **Segments** to view the
   currently defined Segments.

2. On the *E-Business Control Center* main menu, select **File—New—Content
   Selector**.

The *Editor* screen is displayed.

3. On the *Editor* screen, enter this information (first Content Selector):

   Name: **Employee Upcoming Events**

   Description: **Employee Upcoming Events**

4. Click **Create/Edit**.

   The *Content Selector* screen is displayed.

5. Reference the *Conditions* section, and enable "The visitor is a member of a predefined customer segment."

6. Reference the *Action* section, and click the **customer segment** link.

   The *Select Customer Segments* screen is displayed.

7. Reference the *Available Segments* list, and select *Employee* and click **Add**.

8. Click **Ok**.

9. On the *Content Selector* screen, click the **empty content search** link.

   The *Content Search* screen is displayed.

10. Reference the *Property Set* drop-down list, and select **IdcDefaultSchema**.

11. Reference the *Property* drop-down list, and select **EventType**.

12. Click **Add**.

   The *Content Search Values* screen is displayed.

13. Reference the *Comparison* drop-down list, and select **contains**.

14. Reference the *Value* drop-down list, select **Company Event**.

15. Click **Add**.

16. Select **Industry Event** from the *Value* drop-down list.

17. Click **Add**.

18. Select **HR Event** from the *Value* drop-down list.

19. Click **Add**.

These entries are added as Value phrases:

```
contains "Company Event"
contains "Industry Event"
contains "HR Event"
```

20. Enable "Qualifying items may match ANY value phrases."

21. Click **OK**.

    On the *Content Search* screen, this entry is added as a Descriptor:

```
IdcDefaultSchema: EventType contains "Company Event" or
        contains "Industry Event"or
        contains "HR Event"
```

22. Click **OK**.

23. On the *Content Selector* screen, click **OK**.

24. On the *Editor* screen, select **Close**.

25. Click **Yes** to save the Content Selector.

26. On the *E-Business Control Center* main menu, select **File—New—Content Selector**.

    The *Editor* screen is displayed.

27. On the *Editor* screen, enter this information (second Content Selector):

    Name: **Partner Upcoming Events**

    Description: **Partner Upcoming Events**

28. Click **Create/Edit**.

    The *Content Selector* screen is displayed.

29. Reference the *Conditions* section, and enable "The visitor is a member of a predefined customer segment."

30. Reference the *Action* section, and click the **customer segment** link.

The *Select Customer Segments* screen is displayed.

31. Reference the *Available Segments* list, and select *Partner* and click **Add**.

32. Click **Ok**.

33. On the *Content Selector* screen, click the **empty content search** link.

    The *Content Search* screen is displayed.

34. Reference the *Property Set* drop-down list, and select **IdcDefaultSchema**.

35. Reference the *Property* drop-down list, and select **EventType**.

36. Click **Add**.

    The *Content Search Values* screen is displayed.

37. Reference the *Comparison* drop-down list, and select **contains**.

38. Reference the *Value* drop-down list, and select **Partner Event**.

39. Click **Add**.

40. Select **Industry Event** from the *Value* drop-down list.

41. Click **Add**.

    These entries are added as Value phrases:

```
contains "Partner Event"
contains "Industry Event"
```

42. Enable "Qualifying items may match ANY value phrases."

43. Click **OK**.

    On the *Content Search* screen, this entry is added as a Descriptor:

```
IdcDefaultSchema: EventType contains "Partner Event" or
       contains "Industry Event"
```

44. Click **OK**.

45. On the *Content Selector* screen, click **OK**.

46. On the *Editor* screen, select **Close**.

47. Click **Yes** to save the Content Selector.

48. On the *E-Business Control Center* main menu, select **File—Exit**.

Stop and Start the Stellent and WebLogic Servers

Stop any active servers and then follow these steps to restart the servers:

1. Start Stellent Content Server from a command prompt (or from the *Start* menu on Windows).

2. Start WebLogic Server from a command prompt (or from the *Start* menu on Windows).

3. Start WebLogic Commerce Server from a command prompt (or from the *Start* menu on Windows).

VIEW THE DEMONSTRATION PORTAL

View the updated Example Portal page featuring content served up dynamically through Stellent Content Server. Accesss the sample portal using one of these methods:

❖ Select *Start—Programs—WebLogic Commerce Server—Example Portal*.

❖ In a Web browser, enter the URL for the Example Portal.

For example:

```
http://<WebLogicCommerceServer>/portal/
```

The set up of the demonstration portal is complete.

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