

Website creation and maintenance using Oracle Portal 10G



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This document is a user guide for staff who create and maintain web pages using Oracle Portal, a Web Content Management System for storing, organising and making accessible pages of information on the web.

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Key concepts and terminology.

What is Oracle Portal?

Oracle portal is a Web Content Management System which is used at [UniS](#) for the creation, storage and management of the Universities internet & intranet pages. It differs quite markedly from the traditional web authoring techniques used by some people in the past (e.g. use of Dreamweaver to create html files which are transferred to a Unix web server).

Here are some of the main characteristics of Oracle Portal

- Page creation and maintenance is performed entirely within a web browser – no special software is required
- Page creation and maintenance is very easy, requiring virtually no technical skill or knowledge and only a little training
- All pages are based upon standard templates which cannot be accidentally or deliberately amended thus ensuring a consistent look and feel across the entire university internet / intranet.
- Many advanced features such as search boxes and navigation bars are automatically created as pages are created
- IT Services provides full support, documentation and training for users maintaining their departmental website using Portal

Page Groups, pages and subpages

A traditional website consists of a large number of individual web pages. These pages are physical files stored on a webserver and are often arranged into directories. The physical directory and filenames determine the URL, which points to a particular page.

In Oracle Portal there are no files and directories, all content is being stored in an Oracle database. A website constructed using Portal consists of a set of logical 'pages'. Since there are many hundreds of pages across the entire University internet / intranet, the pages are grouped together into **page groups**. For the University internet / intranet, a page group has been created for each administrative department and some schools. This page group will contain all of the pages belonging to the department. A small number of staff within the department will be given access to manage the page group, which means that they can add, delete and modify pages within the page group.

The name of the page group is important since it is also the name of the **root page** and forms an important part of the URL of a department's web pages. [The portal term 'root page' is more commonly referred to as the 'home page' in other web systems and traditionally exists as a file called index.htm or home.htm]

For example, the safety department would have a page group called **safety**. The URL of the safety root page is thus <http://portal.surrey.ac.uk/safety>

Within a page group all pages are subpages of other pages. Thus the resulting website is a hierarchical collection of related pages. Whenever you create a page, you first select the parent page and then click '[Create: Sub-Pages](#)'. Oracle portal automatically creates links on every page to all of the subpages. This hierarchical arrangement of pages is also reflected in the URL of the pages. Suppose the safety department had a page listing the staff in the department. By creating this as a subpage of the root page, firstly a link would automatically be created to this page from the root page and secondly, the staff page would sit below the root page in the URL eg <http://portal.surrey.ac.uk/safety/staff>

Page Regions and Page Templates

Each and every portal page is divided into **regions**. A region is simply a rectangular area of the page, which is set aside for holding a particular type of content. This is the basis for maintaining a consistent set of pages across the university intranet, with all pages having the same clearly defined regions and hence structure (eg a header region at the top with the UniSLife banner, a navigation region on the left and a footer region at the bottom of the page).

Rather than having to reproduce the same set of regions manually on each new page, a **page template** is created once and all you need to do is to point to the template each time you create a new page. The template is defined in such a way that many of the regions on the resulting page cannot be changed. This ensures a consistent corporate style (and allows this style to be very easily changed across all pages at a later date).

Items

So far, we have concentrated entirely on the structure of the website and the web pages – but what about the content? In portal content is placed on web pages by adding **items**. There are many different types of item which are covered in more detail later, but examples are Text, URL, or File.

Logging in

The vast majority of Portal web pages are publicly accessible which means that anyone with a web-browser and an internet connection can view the pages. However, before you can create any new pages or amend any existing pages, you must logon to Oracle Portal.

To login to Oracle portal simply open your web browser and go to the Portal Home Page <http://portal.surrey.ac.uk/pls/portal> you may like to bookmark this web page for future reference.

From this page, simply click on the **Login** link then enter your single sign-on userid and password. You will remain logged in to Oracle Portal for as long as you keep this browser

window open. You can browse to any other page within Portal, the UniS website or the internet and you will remain logged in to Oracle Portal.

Logging out.

It is good practise to logout from Portal when you have finished work especially if you leave the browser window open. Many portal pages including the portal home page (see logging in section above) and the Navigator, have a logout link. If you simply close your browser window while logged in, this will also log you out.

Changing your password.

Passwords are no longer changed or updated in Oracle Portal. Your password is managed by 'Active Directory'.

If you experience any problems please contact staff-support@surrey.ac.uk in the first instance.

The Page Editor

Once you are logged in to Portal, you will see an [Edit](#) link on any page which you are authorised to edit. This will be located in the middle of the page just below the page banner. (you may need to refresh your page to see the edit button). So, after successfully logging in, the first step is usually to navigate in your browser to the page you wish to edit (in the normal way just like a person viewing the site) and then click on the [Edit](#) link.

The Graphical view

The editor allows you to view the page in one of four views. The default view is the **Graphical view** and this is the most useful and you will do most of your work in this view. In the graphical view, the regions of the page are identified by pale gold borders. For pages based on the standard template, there is in fact only one region, which you can edit. This is known as the **body region**.

You can identify this region as it has the following icons in the top left corner 

Returning to the standard Page View

Although the graphical view gives a very close approximation to the final look of the page as seen by end users, it is sometimes useful to check the end result periodically. By clicking on [View Page](#) in the top right corner, you can leave the page editor. Clicking on [Edit](#) on the subsequent page will allow you to return to the editor.

Other Views

The other views are far less useful. The **Layout View** is not particularly useful although it could prove useful if you wished to act on a number of items at once (eg to delete a whole series of items in one operation). The **List View** is again only useful when performing bulk operations. Since in either of these views, it is possible to act on a number of items together it is easier to make a bigger mistake than in the graphical view – **so take care!** The **Mobile Preview** can be ignored.

Go to Page – Will list all pages within your site for ease of navigation

Page: Properties

Main Tab: No Changes should be made

Template: Here it is possible to revert between templates

Access: Either Inherit Access Settings from Template or Specify Access Settings (see page 5 item 10)

Optional: It is possible to change the order of the sub-pages

Parameters: No changes should be made

Events: No changes should be made


The Navigator

The Navigator provides an overview of the structure of a website displayed as a series of lists of page groups, pages and sub-pages. It makes no attempt to show the site in a graphical way nor does it go down to the level of Items (content).

All of the functionality provided by the navigator is also provided by the Page Editor and it is recommended that the Page Editor is used wherever possible.

Be careful when using the navigator as it gives you access to some powerful bulk operations (eg deleting a page may result in many subpages also being deleted).

You can reach the Navigator in one of two ways:

From the [Portal Home page](#), click the **Builder** icon  followed by the

Navigator  icon.

OR

From the Page Editor, click on the **Navigator** link towards the top right corner of the page.

The navigator has 3 tabbed regions – only the **Page Groups** tab is relevant. Also, within page groups, there are many sections which are not relevant.

Main areas (links) you will use are **Your Department**; [View Root Page](#), [Edit Root Page and Copy Root Page](#). To make changes to your home page click on [Edit Root Page](#), to edit other pages within your site click [site name>pages](#).

Creating a new page

As explained in the introduction to this booklet, pages are arranged in a hierarchy and in effect all pages are sub-pages of other pages. Thus the first thing to decide when creating a new page is which page will act as the parent to this page. This is important for two reasons, firstly since the parent page will have a link to the subpage and secondly, the direct access URL of the new page will be the name of the new page concatenated onto the end of the parent page.

When creating a page, the default page type is **Standard**. However, occasionally you may wish the subpage to be a page on a different web server. In this case, choose a page type of **URL**. The advantage of creating this link as a sub-page is that it will appear in the sub-page navigation bar of the parent window.

1. Navigate to the parent page under which you wish to create a subpage
2. Click on the [Edit](#) link on this page to enter the **Page Editor**
3. Click on **Create: [Sub-Pages](#)**
4. Select the type of page you require – **Page Type:** Standard or URL.
5. Enter a page **Name**. This name will be used in the direct access URL for the page. Use only letters A-Z and numbers 0-9 No spaces. Keep the name as short as possible.
6. Enter a **Display Name**. This name will appear as the title of the new page immediately below the page banner and also on the title bar of the browser window. **Do not** use an ampersand but type the word ‘and’ if necessary.
7. A page **Description** is optional and can be used to describe the content of the page that you are creating. (it will be shown beneath the title in the sub-page box)
8. **Do Not** change any other settings (ie Navigation Page For Banner and Page Caching Section).
9. On the **Next** stage, your department template is automatically chosen for you. You could however, change this to your ‘(dept) *template 2*’ option, (a two column template). You will have been notified of the appropriate template for your department. For URL pages, enter the URL of the external page.

10. On the **Next** stage, if you are ready for your page to go live, select '**Inherit Access Settings from Template**' If you want the page to be restricted to UniS Staff, then you will need to select '**Specify Access Settings**' and type the name of the group '**Authenticated_users**' in the Grantee area, leave 'View' selected and click the **Add** button. There should be no need to select any item under the heading '**Access Properties**' de-select 'Display to public'
11. Click on **Finish**. You will be taken to the new page in Edit mode.

Deleting a page


Take care when deleting a page. If you delete a page, all of the items on the page will be deleted and all subpages will also be deleted. Ensure that any items or sub-pages, which you wish to keep, are moved to other pages before deleting the page.

To delete a Sub-Page you will need to use the Red Cross located to the left of the page that you wish to remove, please be sure that you are looking at your **own** site and that the above hi-lighted paragraph is adhered to. When you are sure that you have the correct page listed on the left, click on the Red Cross, you will be warned of your deletion and prompted to confirm it.

Once deleted the page and any items or sub-pages belonging to this page will also be deleted. Once deleted the page is **NOT** retrievable.






Working with items

Adding a new item

1. To add a new item, you must first display the page in the Page Editor.
2. Click on the **Add item** icon  in the top left corner of the page body region.
3. Select the type of item you wish to add (see appendix A for list of item types and their usage)
4. Depending on the item type you select, you will be prompted for various information.
5. Move through the pages until you reach the **Finish** button.


Arranging items

Items placed in the body region are listed in either one or two vertical columns depending on which template was selected at the time of page creation. Each time a new item is added, it is placed beneath all existing items. To arrange items in a different order proceed as follows:

1. Click on the **Arrange** icon  on the body region banner.
2. Highlight one or more items on the left (holding down the shift or ctrl keys will allow you to make multiple selections).
3. Use the     icons on the right to move the selected item(s) up, down, to the top or to the bottom respectively.


Editing an item

Once an item is in place you may need to go back subsequently and edit the item. Examples would be editing the text in a text item or modifying a URL in a URL Item.

1. Click on the **Edit** icon  just above the item you wish to edit
2. Make amendments as appropriate
3. Click the **OK** button.

Other item tasks (eg deleting).

To perform other tasks on items

1. Click on the **Action** icon  just above the item you wish to action.
2. Various actions can now be selected such as copying, moving or deleting the item.

Advances item properties:

Although there are many different types of item you can add to a page, many of them share the same set of properties. In most cases, when adding an item you can choose a simple version (eg to add text to a page you can choose 'Text'). See **appendix A** for a list of properties for each item type.

Publish Date

By specifying a publish date when adding an item to a page, you can add content which will not appear on the page until the date which you specify.

Expiration Period

You can use this option to ensure that an item is removed from the website either on a fixed date or after a certain number of days.

Available Perspectives

This property is not currently used and can be ignored

Image & Image alignment

For certain items such as a URL item or File item; you can display an icon alongside the display name. This might be useful, for example if you wished to indicate the format that a document was in (eg Word or PDF). These icons are now available in the following area: S Drive – Shared\Gen_web\icons\

Bottom – Text is put at the bottom of the image

Top – Image is put on the top of the text

Left – Image is to the left of the text

Right – Image will be displayed on the far right of the column.

All other functions can be ignored

Basic Search keywords


The search system will match on any word which appears within an item display name or within the text of a Text item or File item. However, you can associate additional keywords with an item which will be matched to search criteria. This is most useful for items containing few words eg a URL item or an Image item.

Author

This property is not currently used and can be ignored.

Enable Item Check-out

You can ensure colleagues do not overwrite changes you have made by using the Check-out function. This simple function makes colleagues aware a document/item is being changed. When you first upload the item you will need to tick Enable Item Check out at the bottom of the page.

To check out an item you click on the Actions icon  and select Check out item. Once you have finished updating your item simply click on the actions icon check the item back in and upload the new version and it will be now be live.

Display Options

Item Displayed Directly In Page Area

Link That Displays Item In Full Browser Window

Link That Displays Item In New Browser Window

The above are examples, and the precise options available can vary from item to item. Sensible use of these options can have a big impact on the look and feel plus the usability of your website. Only guidelines can be given here

- Open new browser windows sparingly. As a general rule, File links and URL links to University web pages should open in the current window whereas links to pages off-campus should open in a new window
- Text items should generally display directly in the page if the resulting page is no more than twice the length of a physical screen. For large amounts of text which would result in excessive scrolling, choose Full Browser Window. This allows more space since there are no banners, navigation pages or footers on the new page. This also gives a far better result for pages which will often be printed out.

Searching

Note that when new pages are created or new items are added to pages they will not be searchable until the following day. Oracle portal has its own built-in search engine which crawls the entire site every night and rebuilds all of the search indexes.

For a basic search, simply enter a single keywords and click on **Go**.

By default, the search will search only those pages within the current page group and will search for items, which contain **all** keywords. Matches will be made against the display names of pages and items, the content of text and file items and any additional Search Keywords associated with the item.

From the results page, if you need to refine your search, a vast number of very sophisticated searches can be performed. It is beyond the scope of this document to explain all the options – see the **Search Tips** on the results page for a full explanation.

Google Indexing and Clean URL's

The factor that most affects our sites Google rank is the number of links to that site/page from other indexed sites/pages. In short if we have a number of pages which link to each other and have a sitemap or A to Z style page, we should do alright with Google and other search engines.

A best practice for Portal is to **always use direct access URL's** to reference page groups and sub-pages where appropriate and possible.

(e.g. <http://portal.surrey.ac.uk/catering/roots/menu/>)

Another alternative is to register each separate page group with Google. This will ensure that they all get crawled/indexed.

The Problem with Google and Dynamically generated web pages.

"**Google** limits the number of dynamic URLs that it crawls..."

If your pages are dynamically generated Google is able to index dynamically generated pages. However, because the web crawler can easily overwhelm and crash sites serving dynamic content, they limit the amount of dynamic pages indexed.

Clean URL

Clean URL's are accessed by logging into your site and accessing the Page properties of each page right through to the specific page you want to link to. For example the clean URL to University Managed Housing would be -

<http://portal.surrey.ac.uk/accommodation/privateaccomm/umh/>

The quickest way of finding this URL is by going to the page you want to link to and click **Create: Sub-Page**, this will then show you the Path/URL which will get you to that particular page. ***Please note: Do not make this page by clicking finish.***

e.g. Path: PAGE / ACCOMMODATION / PRIVATEACCOMM / UMH /

You would add the above to <http://portal.surrey.ac.uk/> e.g. <http://portal.surrey.ac.uk/accommodation/privateaccomm/umh/> and make it all lowercase with no spaces.

Linking to Documents/Items

When you upload an item, the item is given a unique id. You can access this unique ID by right clicking the item and selecting "Copy Shortcut". This ID is a "durable link" which will stay with the item until you delete it. e.g.

<http://portal.surrey.ac.uk/pls/portal/url/ITEM/DE9DFF2CB33A3C4DE0340003BA296BDE>

You can also link to documents by accessing the document within portal and selecting the resolved URL. This does have its problems, for example; if you upload the document with a different name to the initial document uploaded into the system, then it will not access the document because the name is different. e.g.

<http://portal.surrey.ac.uk/pls/portal/docs/PAGE/WEBTESTING/KARLS/INDEX.doc>

A note on text formatting.

Although the use of the standard templates goes a long way to ensuring consistency of style and layout across the entire corporate intranet, you still have complete control over the text which is displayed on your pages within Text Items.

Please adhere to the following guidelines:

1. All text should be **black**. Coloured text should be used very sparingly to emphasise words where necessary.
2. Portal will automatically colour text for email addresses and URLs contained within text – stay with these default colours for consistency.

3. Text should always be in **Verdana font** and **size 3** if possible. If you have a lot of text, size 2 may be used for some or all of the text. Although size 1 may be used, if you find you need to go down to this size, to avoid excessive page scrolling, you should consider alternatives such as:
 - Using a file item with the content stored in Word
 - Displaying the text in a full browser window (perhaps with a summary on the main page)
 - Splitting the information over a number of individual pages

4. To create an email link within text area either type the email address directly into the text box with a space at the end to ensure that it turns into a link, or if you would prefer to create a hidden email hyperlink within the text area, you will need to hi-light the word to which the link will be added and select the '**Create Hyperlink**' button. An edit box will open, overtype the **http://** text with the word '**mailto:**' followed by the email address of the recipient.

i.e. <mailto:a.test@surrey.ac.uk>

5. When restricting pages to 'University staff only' whilst in edit mode please navigate to the 'access' button at the top left of the page. Select '*Specify Access Settings*' deselect '*Display Page to Public Users*'. Under the heading '*Grant Access*' type '*Authenticated_users*', leave the setting to 'view' and click **Add. Apply/ok** to restrict this page to staff only. However, you will need to tell staff in some way that this page exists by putting a url link or text information on a previous live page.

Appendix A: Item types and their use.

The following table lists all of the Item types that you can add to the body region of your web pages with some notes about their usage etc.

Content Item Types	
Text	<p>Text Display name Description Publish/expiry date Image Image align Keywords Author Within page area/Full Window/New Window.</p> <p>Note: Where you have a large amount of text, it is often preferable to use Text and select New Window or Full Window rather than Simple Text which will always display within the current Window. This gives more space for the text and is a much better format for printing out.</p>
File	<p>Filename Display name Description Publish/expiry date Image Image align Keywords Author Existing/new window</p>
URL	<p>URL Display name Description Publish/expiry date Image Image align Keywords Author Existing/new window</p>
Image	<p>Image File Image Map</p>

	Image Map Name Description Publish/expiry date Keywords Author
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