ORACLE®

Oracle WebCenter Portal

Getting Started with Oracle WebCenter Portal

Build a Portal

1. Create a portal

2. Create pages or subpages

3. Build portal navigation

4. Customize portal look and feel

Develop Portal Pages

5. Enable services

6. Add components to a page

7. Manage portal content

8. Use content presenter

9. Integrate with Oracle Document Cloud Service

10. Publish pages

Add Data Visualizations

11. Create a data source

12. Add the default data visualization

13. Configure data visualization

Manage Membership and Security

14. Add members

15. Create a custom role

16. Edit permissions for a role

17. Customize page permissions

Build a Portal

① Create a portal

➤ Sign in to Oracle WebCenter Portal.

➤ In the portal browser, click **Create Portal**.

➤ Choose a template and provide portal specifications like the portal title, description, search keywords, and type of portal.

➤ Click **Create Portal**.

## 2   Create pages or subpages

> In the portal editor, click **Create New Page**.

> Choose the page style you want to use and specify the page title and other details.

> Click **Create Page**.
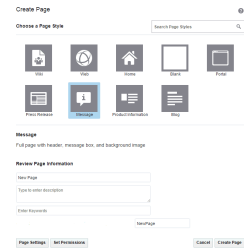
3   Build portal navigation

> Select an existing navigation item in the portal editor, then click its **Actions** icon and select **Add**.

> Select **Page link**. You can select any other navigation item you want to add.

> In the Pages dialog, select the page you want to add to portal navigation and save your changes.

> Similarly add other navigation items and specify the properties if required.
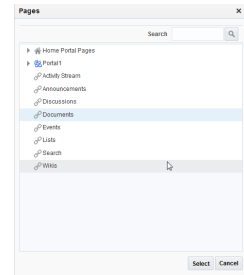
## 4   Customize portal look and feel

> In the portal editor, click the **Settings** icon.

> On the **Settings** page, modify the settings to suit your needs.

> Click **Save**.
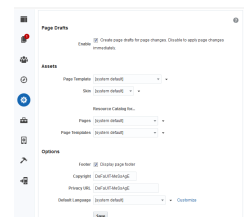
Develop Portal Pages

5   Enable services

> In the portal editor, click the **Tools and Services** icon.

> Select the tools and services you want to enable in your portal, for example Documents, Events, Lists, and Discussions.

> Click **OK**.
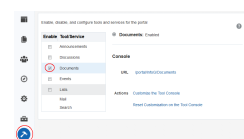
6   Add components to a page

> Open your portal page in the portal editor.

> Click **Add Content**.

> In the resource catalog, locate the required component and add it to the page.
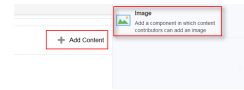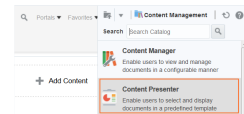
7   Manage portal content

> In the portal editor, open your page, and click **Add Content**.

> Select **Content Management**, then click **Content Manager**. Save the page

> In the portal view mode, click **Upload** and select **Standard Check-In** to upload a document.

> Browse to locate the file you want to upload and click **Upload**.
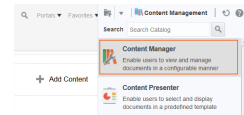
8   Use content presenter

> In the portal editor, click **Add Content** on the desired page.

> Select **Content Management** from the resource catalog, then click **Content Presenter**. Save the page.

> Click anywhere in the Content Presenter task flow and click **Edit**.

> Click **Select Content**, select a display template, and browse to the content you want to display on your page.

## 9   Integrate with Oracle Document Cloud Service

> In the portal editor, click **Add Content** on the desired page.

> Select **Content Management** from the resource catalog, then click **Oracle DOCS Content Manager**.

> In the Oracle DOCS Content Manager task flow, click the **View Actions** icon and select **Parameters**.

> In the Parameters dialog, specify the Oracle Document Cloud Service URL and select the required theme for the page. Save the page.
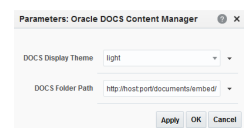
10   Publish pages

> In the portal editor, click the **Drafts** icon.

> Select the pages you want to publish.

> Click **Publish**.
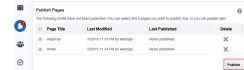
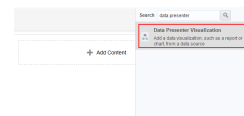# Add Data Visualizations

11   Create a data source

> In the portal editor, click the **Assets** icon.

> In the left panel, under Data Sources, click **SQL Data Sources**, then click **Create**.

> In the Create New SQL Data Source dialog, specify the page title and configuration details. Specify the SQL statement to query the SQL data source. For example. SELECT * FROM Persons WHERE City LIKE 'sa%'.

> Click **Test** to validate and click **Save**.
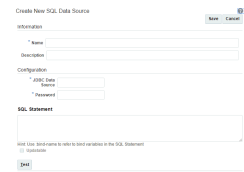
## 12   Add the default data visualization

> In the portal editor, click **Add Content**.

> From the resource catalog, select **Data Presenter Visualization**.

> Save the page.

13   Configure a data visualization

> In the page editor, select the data visualization component and click **Configure**.

> On the **Data Source** page, select the existing data source and click **Next**.

> On the **Template** page, select a visualization template to present the data retrieved from the data source and click **Next**.

> On the **Options** page, set the elements on the **Setting** tab and define the parameters on the **Parameters** tab. Click **Save**.
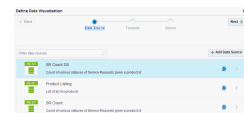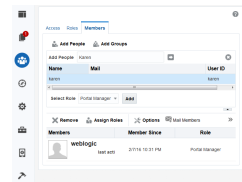
Manage Membership and Security

14   Add members

> In the portal editor, click the **Security** icon.

> On the **Members** tab, click **Add People** or **Add Groups**.

> Search and select the members you want to add.

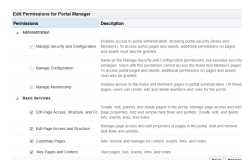> Select a role and click **Add**.

15   Create a custom role

> On the **Roles** tab, click **Create Role** and select **Custom Role**.

> Provide role specifications such as, the role name, description, and role template.

> Click **OK**.
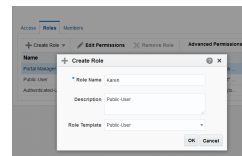
## 16   Edit permissions for a role

> On the **Roles** tab, select a role and click **Edit Permissions**.

> Select the permissions you want to assign to the role.

> Click **Save**.

17   Customize page permissions

> Open your portal page in the portal editor, then click its **Actions** icon and select **Page Information**.

> On the **Security** tab, select **Override Security**.

> Modify the access permissions as required.

> Click **Save**.
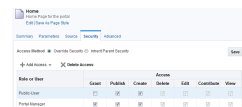
✅ **You're done!**

Find out more about *Oracle WebCenter Portal*

Product Information

See: oracle.com/WebCenter Portal and docs.oracle.com

See: cloud.oracle.com/WebCenter_Portal and docs.oracle.com

Attend Oracle WebCenter Events

See events.oracle.com and blogs.oracle.com/ for information about Oracle WebCenter events.

Join the Community

- Oracle WebCenter Community: oracle.com
- Oracle WebCenter Portal forum

Follow Oracle WebCenter on

Facebook   Twitter   YouTube