Oracle® Personal Portfolio

Implementation and Administration Guide

Release 11*i*

Part Number B13787-01

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Oracle Personal Portfolio Implementation and Administration Guide, Release 11*i*

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Oracle Personal Portfolio Implementation and Administration Guide, Release 11*i*

Part No. B13787-01

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Preface

Welcome to the Oracle Personal Portfolio Implementation and Administration Guide, Release 11*i.*

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.

- Oracle Student System

  If you have never used Oracle Student System, Oracle suggests you attend one or more of the Oracle Student System training classes available through Oracle University.

- Oracle Self-Service Web Applications.

  To learn more about Oracle Self-Service Web Applications, read the *Oracle Self-Service Web Applications Implementation Manual.*

- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide.*

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This document contains information you need to implement and use Oracle Personal Portfolio. This guide contains three chapters:

- Chapter 1 provides an overview of Oracle Personal Portfolio. It also lists the dependencies for the implementation of Oracle Personal Portfolio.

- Chapter 2 describes the tasks the System Administrator must perform to implement and configure Oracle Personal Portfolio.

- Chapter 3 explains administrative tasks and contains instructions for administering Oracle Personal Portfolio.

- Appendix A describes how to configure and manage lookups for Oracle Personal Portfolio.

- Appendix B describes the Oracle Personal Portfolio workflows.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at http://www.oracle.com/accessibility/

Accessibility of Code Examples in Documentation

JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Other Information Sources

You can choose from many sources of information, including documentation, training, and support services, to increase your knowledge and understanding of Oracle Student System.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- **PDF Documentation**- See the Documentation CD provided with each release for current PDF documentation for your product. This Documentation CD is also available on Oracle*MetaLink* and is updated frequently.

- **Online Help** - You can refer to Oracle iHelp for current HTML online help for your product. Oracle provides patchable online help, which you can apply to your system for updated implementation and end user documentation. No system downtime is required to apply online help.

- **11i Release Content Document** - Refer to the Release Content Document for new features listed release. The Release Content Document is available on Oracle*MetaLink*.

Related Guides

Oracle Student System shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other guides when you set up and use Oracle Student System.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at http://oraclestore.oracle.com.

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Guides Related to This Product

Oracle Student System Implementation and Administration Guide

This guide describes provides setup information for Oracle Student System. Use this guide to set up values for codes, types, profile options, and institution

information in Oracle Student System. This guide also provides information on integrations with other Oracle products and features.

Oracle Student System Open Interfaces User Guide

The Oracle Student System Open Interfaces User Guide provides information on importing data into and transferring data within Oracle Student System. You can also export data from Oracle Student System to another Oracle application or third-party software for processing and then import the processed data into Oracle Student System.

Oracle Self–Service Web Applications Implementation Guide

This manual contains detailed information about the overview and architecture and setup of Oracle Self–Service Web Applications. It also contains an overview of and procedures for using the Web Applications Dictionary.

This user guide also contains references to the following Oracle publications:

- Oracle Student System for the United Kingdom User Guide
- Using Oracle HRMS - The Fundamentals (US)
- Managing People Using Oracle US Federal HRMS
- Configuring, Reporting, and System Administration in Oracle HRMS
- Multiple Organizations in Oracle Applications
- Oracle Applications Desktop Integrator User's Guide
- Oracle Marketing Implementation Guide
- Oracle Marketing User Guide
- Oracle Bill of Materials User's Guide
- Oracle iPayment Implementation Guide
- Oracle Payables User Guide
- Oracle Receivables User Guide
- Oracle General Ledger User Guide
- Oracle Inventory User's Guide
- Oracle Telesales Implementation Guide
- Oracle Telesales User Guide

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

"About" Document

For information about implementation and user documentation, instructions for applying patches, new and changed setup steps, and descriptions of software updates, refer to the "About" document for your product. "About" documents are available on Oracle*MetaLink* for most products starting with Release 11.5.8.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products.* This manual also provides information to help you build your custom Oracle Forms Developer forms so that the forms integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Student System implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Oracle*Metalink*

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Student System and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many education centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training

professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Student System working for you. This team includes your technical representative, account manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

Oracle*MetaLink*

Oracle*MetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle*MetaLink*, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (http://metalink.oracle.com).

Alerts: You should check Oracle*MetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

1

Product Overview

Oracle Personal Portfolio is a portfolio management tool for institutions of higher education. It combines and centralizes portfolio functionality required by students, institutions, and third parties. This chapter details the following topics:

- Overview
- Dependencies and Integrations

1.1 Overview

Oracle Personal Portfolio allows students to demonstrate competencies and showcase their work through portfolios accessible to external audiences.

1.2 Dependencies and Integrations

Although there are no dependencies and integrations for Oracle Personal Portfolio, it interacts with the following products:

- Oracle Workflow
- Oracle Trading Community Architecture

1.2.1 Oracle Workflow

Workflow functionality in Oracle Personal Portfolio allows users to automatically route information and deliver notifications to users regarding issues needing their attention or processes that have been completed.

You must install and run Oracle Workflow to use workflow functionality. For more information, see *Oracle Workflow Guide* and Chapter 2, "Implementing Oracle Personal Portfolio".

1.2.2 Oracle Trading Community Architecture

Oracle Trading Community Architecture (TCA) is used to import person details. You can also import organization and contact detail using TCA. For more information on TCA, refer to *Oracle Trading Community Architecture Administration User Guide.*

2

Implementing Oracle Personal Portfolio

This chapter contains information about the tasks a System Administrator must perform to implement and configure Oracle Personal Portfolio.

2.1 Implementation Tasks

The System Administrator must perform the following tasks to implement Oracle Personal Portfolio:

- Setting up Workflows
- Creating and Setting Responsibilities
- Setting Up Guest Accounts
- Setting Up Profile Options

2.1.1 Setting up Workflows

Oracle Personal Portfolio works in conjunction with Oracle Workflow to define and implement business processes. For more information, see *Oracle Workflow Guide*.

You must install Oracle Workflow to use workflow functionality in Oracle Personal Portfolio. Ensure that you have the appropriate version.

For information on Oracle Personal Portfolio seeded workflows, see Appendix B, "Workflows". To query for Oracle Personal Portfolio workflows and business events, use **IGP%** as the search string.

2.1.2 Creating and Setting Responsibilities

Oracle Personal Portfolio includes some seeded user responsibilities. You can create additional responsibilities, modify menus and their functions, and specify which menu functions are included.

You must associate new responsibilities, with the Oracle Personal Portfolio account classifications. This ensures that they are available in the application.

User-defined responsibilities must be prefixed with **IGP**. For more information, see *Oracle Applications System Administrator's Guide*.

2.1.3 Setting Up Guest Accounts

Associate the Portfolio Guest Viewer responsibility to the application GUEST user.

Navigation
Security > **User** > **Define**

Notes
Query for GUEST and add the Portfolio Guest Viewer responsibility.

2.1.4 Setting Up Profile Options

Profile options allow you to configure and customize the application to suit your requirements. You must set up the profile options described in the following table.

Table 2–1   Profile Options

Profile Option Name	Description
IGP: Approver of Template to Publish	Specify the FND user responsible for approving templates who is set as the default user for the template approval workflow.
IGP: Approver of Portfolio Account Creation	Specify the FND user responsible for approving accounts who is set as the default user for the account approval workflow.

2.2 Configuration Tasks

After implementing Oracle Personal Portfolio, the System Administrator can create accounts and configure workflows.

2.2.1 Creating Accounts

Users can obtain user and portfolio accounts.

Navigation

Security > **User** > **Define**

Security > **Responsibility** > **Define**

2.2.1.0.1 Creating User Accounts

For users to obtain a user account, a record must exist in TCA. If a record does not exit, you must create one.

Create records in the Users window. You can associate responsibilities with a user during user definition.

Use the Responsibilities window to define or edit responsibilities.

2.2.1.0.2 Creating Portfolio Accounts

For users to obtain a portfolio account, a record must exist in the back-office application. To grant portfolio access to an existing user, associate an Oracle Personal Portfolio responsibility with the user in the Users window. You can also create portfolio accounts by using the self-service application. For more information, refer to Creating Accounts.

2.2.2 Configuring Workflows

The System Administrator can construct appropriate workflow events and sequences to accommodate account, portfolio, and template approval requirements.

The workflow can be customized to reflect your Oracle Personal Portfolio processes.

All workflow actions and events are recorded and can be viewed by the System Administrator.

3

Administering Oracle Personal Portfolio

3.1 Overview

Administering Oracle Personal Portfolio includes:

- Mapping Account Types

- Managing Accounts

- Managing Templates

- Uploading Public Artifacts

- Managing Portfolios

The following table describes the administrative functions available to the Portfolio Administrator and Career Administrator responsibilities.

Table 3–1   Oracle Personal Portfolio Implementation Tasks

Task	Performed By
Mapping Responsibilities	Portfolio Administrator
Managing Accounts	Portfolio Administrator Career Administrator
Managing Templates	Portfolio Administrator Career Administrator
Uploading Public Artifacts	Portfolio Administrator Career Administrator

3.1.1 The Administration User Interface

The Notifications page is the home page for Oracle Personal Portfolio administrative users. On this page, you view notifications and access account- and portfolio-related functions.

3.1.2 Oracle Personal Portfolio Responsibilities

Oracle Personal Portfolio combines portfolio functionality required by students, schools, and other parties, including counselors and recruiters. Multiple seeded responsibilities accommodate the various user types. You assign responsibilities based on an individual's role. The role to responsibility mapping determines the rights and privileges available.

Oracle Personal Portfolio includes the following seeded responsibilities:

- Portfolio Administrator
- Portfolio Career Administrator
- Portfolio User
- Portfolio Registered Viewer
- Portfolio Guest Viewer

If required, you can add additional responsibilities. For more information, see Creating and Setting Responsibilities.

3.1.2.1 Portfolio Administrator

The Portfolio Administrator defines how responsibilities are mapped to roles, manages accounts and templates, uploads and manages artifacts, and assigns portfolio access to users.

Use the existing System Administrator functionality to create additional user responsibilities with Oracle Personal Portfolio menus and functions.

3.1.2.2 Portfolio Career Administrator

The Career Administrator acts as Career Counselor or Coordinator and assigns portfolio access privileges to reviewers.

With the exception of mapping responsibilities, the Career Administrator performs all the functions of the Portfolio Administrator.

3.1.2.3 Portfolio User

The Portfolio User responsibility is assigned to students allowing them to create, organize, and present portfolios to an audience.

Users create and edit files using the included HTML editor. They can also upload existing HTML files. Portfolios are shared by granting viewing permission to internal and external viewers.

3.1.2.4 Portfolio Registered Viewer

The Portfolio Registered Viewer responsibility is assigned to reviewers.

Registered viewers have a home page for notifications. They receive a login and associated responsibility and can view and comment on the accessible portfolios.

3.1.2.5 Portfolio Guest Viewer

Portfolio Guest Viewer responsibility is assigned to non-registered portfolio viewers. They receive an access link or URL and a PIN through e-mail. The PIN is unique and allows access to a specific portfolio.

3.2 Mapping Account Types

Oracle Personal Portfolio seeded system account types are Faculty, Staff, Student and External.

The Portfolio Administrator maps account types to Oracle Personal Portfolio responsibilities. This allows workflow processes to identify the responsibilities associated with each user. You can associate multiple responsibilities with a single account type. If required, you can edit the mapping.

Navigation
Account Management > **Setup** > **Portfolio Responsibility Mapping**

3.3 Managing Accounts

The seeded account types are **Internal** (faculty, staff, or student) or **External** (users associated with third-party organizations or external agencies, such as recruiters). Managing accounts includes:

- Creating Accounts
- Updating Accounts

■   Deactivating Accounts

3.3.1 Creating Accounts

You can create accounts for internal and external viewers.

3.3.1.1 Creating Internal Accounts

You can create internal accounts only for users with FND records. For information, see Creating Accounts.

Navigation

Account Management > Accounts

Notes

■   **Select check box:** Disabled if the person already has access or if the account has expired.

■   **Expiration Date:** This is the expiration date for the responsibility associated with the selected account type. This field is disabled if the person already has an account or is awaiting account approval.

3.3.1.2 Creating External Accounts

Create external accounts for individuals associated with third-party organizations that coordinate with your institution for accrediting, employment, or recruitment. Creating external accounts includes creating organizations and contacts.

3.3.1.2.1 Creating Organizations   The organization with which the individual is associated must exist in the application.

Navigation

Account Management > Accounts

Notes

■   **Identifying Address check box:** Indicates the primary address.

3.3.1.2.2 Creating Contacts   You can define contacts for existing organizations only.

Navigation

Account Management > Accounts

3.3.2 Updating Accounts

You can update both external and internal accounts.

Navigation
Account Management > **Accounts**

3.3.3 Deactivating Accounts

You can deactivate internal accounts.

You cannot deactivate organizations. You can only deactivate contact accounts.

Navigation
Account Management > **Accounts**

Notes

- **Multiple Responsibilities:** If multiple responsibilities are associated with the External account type, you must update the account type mapping. For more information, see Mapping Account Types.

3.4 Managing Templates

The Portfolio or Career Administrator can create and upload templates that, once approved, are made available to users.

The administrator also updates and manages existing templates. Once created, templates cannot be deleted. To make a template unavailable to users, specify an expiration date.

Managing Templates consists of the following tasks:

- Creating Templates
- Previewing Templates
- Modifying Templates
- Uploading Templates
- Publishing Templates

3.4.1 Creating Templates

Create a new template or one based on an existing format.

Navigation
Portfolio Management > **Templates**

3.4.2 Previewing Templates

Before editing or publishing, you can preview existing templates.

Navigation
Portfolio Management > **Templates**

3.4.3 Modifying Templates

Modify an existing template.

Navigation
Portfolio Management > **Templates**

3.4.4 Uploading Templates

Upload existing templates to make them available to users.

Navigation
Portfolio Management > **Templates**

3.4.5 Publishing Templates

You publish templates to make them available to users. When you initiate the template publication process, a workflow is launched and the template is routed to the appropriate person for approval. Once approved, the template is made available to users.

Navigation
Portfolio Management > **Templates**

3.5 Uploading Public Artifacts

Artifacts are non-HTML files, such as images and text files, used to create portfolios. Public artifacts are files made available to all users by the Portfolio or Career Administrator.

Navigation

Portfolio Management > **Public Artifacts**

3.6 Managing Portfolios

The Portfolio or Career Administrator performs the following portfolio management tasks:

- Viewing Portfolio Assignments

- Assigning Portfolios

- Viewing Portfolio Access Activities

Use the Portfolio Type field to filter the data displayed on the Portfolio Assignment page. Only portfolios published to career services by students are available to display.

Notes

In the Portfolio Type field, the choice of Unassigned Portfolios lists portfolios for which the administrator has not assigned viewers. Student assignment of viewers is not relevant.

3.6.1 Viewing Portfolio Assignments

The Portfolio or Career Administrator can view portfolio assignments by portfolio or viewer details.

Navigation

Portfolio Management > **Portfolio Assignments**

3.6.2 Assigning Portfolios

The author publishes a portfolio to the Career Center to make it available to viewers. The Portfolio or Career Administrator assigns viewers to the preassigned or unassigned portfolios.

Navigation

Portfolio Management > **Portfolio Assignments**

3.6.3 Viewing Portfolio Access Activities

The Portfolio or Career Administrator can view activities for any portfolio published to the Career Center by portfolio author, name, organization, or viewer.

Navigation

Portfolio Management > **Portfolio Activity**

A

Lookups

A.1 Managing Lookup Codes

This section contains the following information:

- Overview
- Configuring Lookups
- Oracle Personal Portfolio User Lookups
- Oracle Personal Portfolio System Lookups

A.1.1 Overview

A lookup type is a category of information, such as account type, also referred to as a List of Values. Each lookup type has a limited list of valid values. A lookup code is the allowable value for a lookup type.

Lookups provide lists of valid values for certain items of information. This has two key advantages:

- Ensures all users use the same terminology, which makes it easier to query on and report the information
- Speeds up data entry because users can enter just enough to identify the value, and Oracle Personal Portfolio completes the entry

You can define your own lookups, lookup types, and lookup codes as well as add values to some predefined lookup types. Lookup types can only be updated if the access level is **User** or **Extensible**.

Although you can make lookup types inactive, you cannot delete a record from a lookup type, regardless of its access level.

To remove an obsolete lookup, disable the lookup code, enter an end date, or change the meaning and description to match a replacement code.

Seeded lookups **cannot** be deleted.

A.1.2 Configuring Lookups

Currently, Oracle Personal Portfolio users cannot view and edit lookups and lookup codes from the application. To access lookups, the Portfolio Administrator must configure the application:

1. Define a Form function referencing the *Define Lookups* form (FNDLVMLU) with the following Parameter string:

   VIEW_APPLICATION=IGS

2. Create a menu entry in a menu attached to a responsibility available from the application.

3. Reference the created function in the menu entry.

A.1.3 Oracle Personal Portfolio User Lookups

The following table describes the Oracle Personal Portfolio user lookups.

Table 3–2   Oracle Personal Portfolio User Lookups

Lookup Type	Lookup Type Meaning	Lookup Code	Lookup Code Meaning
IGP_WZ_FONT_COLOR	Font color for creating HTML pages	#000000	Black
IGP_WZ_FONT_COLOR	Font color for creating HTML pages	#0000C0	Blue
IGP_WZ_FONT_COLOR	Font color for creating HTML pages	#008000	Green
IGP_WZ_FONT_COLOR	Font color for creating HTML pages	#BDB76B	Khaki
IGP_WZ_FONT_COLOR	Font color for creating HTML pages	#C0C0C0	Gray
IGP_WZ_FONT_COLOR	Font color for creating HTML pages	#FF0000	Red
IGP_WZ_FONT_COLOR	Font color for creating HTML pages	#FF00FF	Pink

Table 3–2   **(Cont.)** *Oracle Personal Portfolio User Lookups*

Lookup Type	Lookup Type Meaning	Lookup Code	Lookup Code Meaning
IGP_WZ_FONT_COLOR	Font color for creating HTML pages	#FFA500	Orange
IGP_WZ_FONT_NAME	Font for creating HTML pages	ARIAL	Arial
IGP_WZ_FONT_NAME	Font for creating HTML pages	ARIAL_BLACK	Arial Black
IGP_WZ_FONT_NAME	Font for creating HTML pages	ARIAL_ NARROW	Arial Narrow
IGP_WZ_FONT_NAME	Font for creating HTML pages	COMIC_SANS_ MS	Comic Sans MS
IGP_WZ_FONT_NAME	Font for creating HTML pages	COURIER	Courier
IGP_WZ_FONT_NAME	Font for creating HTML pages	FONT	Font
IGP_WZ_FONT_NAME	Font for creating HTML pages	TAHOMA	Tahoma
IGP_WZ_FONT_NAME	Font for creating HTML pages	TIMES_NEW_ ROMAN	Times New Roman
IGP_WZ_FONT_NAME	Font for creating HTML pages	VERDANA	Verdana
IGP_WZ_FONT_SIZE	Font size for creating HTML pages	6	1
IGP_WZ_FONT_SIZE	Font size for creating HTML pages	7	2
IGP_WZ_FONT_SIZE	Font size for creating HTML pages	8	3
IGP_WZ_FONT_SIZE	Font size for creating HTML pages	9	4
IGP_WZ_FONT_SIZE	Font size for creating HTML pages	10	5
IGP_WZ_FONT_SIZE	Font size for creating HTML pages	11	6

Table 3–2   **(Cont.)** *Oracle Personal Portfolio User Lookups*

Lookup Type	Lookup Type Meaning	Lookup Code	Lookup Code Meaning
IGP_WZ_FONT_SIZE	Font size for creating HTML pages	12	7
IGP_WZ_FONT_SIZE	Font size for creating HTML pages	13	8
IGP_WZ_FONT_SIZE	Font size for creating HTML pages	14	9
IGP_WZ_IMAGE_TYPES	File type for managing graphics	IMAGE/GIF	GIF
IGP_WZ_IMAGE_TYPES	File type for managing graphics	IMAGE/PJPEG	JPEG

A.1.4 Oracle Personal Portfolio System Lookups

The Oracle Personal Portfolio seeded system lookups are listed below:

- IGP_AD_ACCOUNT_TYPES
- IGP_AD_ACC_CLASSES
- IGP_AD_ACC_CLASS_TYPES
- IGP_AD_EXT_ACC_SRCH_CRIT
- IGP_AD_INT_ACC_SRCH_CRIT
- IGP_US_COPY_PAGE_ACT
- IGP_US_FILE_SIZE
- IGP_US_FILE_TYPE
- IGP_US_MOVE_PAGE_ACT
- IGP_US_PORTFOLIO_TYPES
- IGP_US_UPLD_ARTIFACT_ACT
- IGP_VW_ACCESS_TYPE
- IGP_VW_INFO
- IGP_VW_OPEN_SEARCH
- IGP_VW_PUB_SEARCH

- IGP_VW_SEARCH_PORTFOLIO
- IGP_VW_VIEW
- IGP_WZ_PAGE_CRT_METHOD
- IGP_WZ_SRCH_ART_CRIT
- IGP_WZ_TEMP_CRT_METHOD
- IGP_WZ_TEMP_STATUS
- IGP_WZ_TEMP_TYPE
- IGP_WZ_SRCH_PG_CRIT

B

Workflows

B.1 Overview

Oracle Personal Portfolio includes the following seeded workflows:

- Portfolio Account Approval Workflow
- Template Approval Workflow
- Portfolio Deactivation Workflow
- Inform Author About Portfolio Assignment
- Notify Viewers of Portfolio Assignment
- Assignment Removal Notification Workflows
- Add Non-registered Viewers Workflow

B.1.1 Portfolio Account Approval Workflow

This workflow is triggered when a request for a portfolio account is made. This workflow is triggered in order to:

- Approve the creation of an account
- Create an FND user (for external accounts)
- Add responsibilities for a new or existing user
- Add account records

The recipient of the approval workflow receives the following information:

- Account classification: Identifies the type of account as External, Faculty, Staff, or Student

■ Account information: Based on the account classification, information is provided to the approver. The following table lists the information provided to the approver for each account type.

Table 3–3 Account Description Table

Account Type	information Provided
External	■ User Name
	■ Expiration Date
Staff	■ Name
Faculty	■ Person Number
	■ Expiration Date
Student	■ Student Name
	■ Student Number
	■ Expiration Date

When an account is approved, a notification is sent to the account requester. The workflow may be user-defined, such as e-mail, notification, or both. External accounts are not informed of account approval or generation if the workflow is set to **Notifications**.

Upon approval of an internal account, a concurrent request is run to generate:

■ A party in TCA, if applicable

■ An FND user account

■ An Oracle Personal Portfolio account

■ Associated responsibilities

B.1.2 Template Approval Workflow

This workflow is triggered when a request for a template publication is made. This workflow is triggered in order to approve and publish the template.

Template approval can be set up in either of the following ways:

■ An approval hierarchy can be set up through a standard workflow capability

■ A profile value can be set to assign a single approver

B.1.3 Portfolio Deactivation Workflow

The deactivation workflow is triggered when a portfolio account is dedicative. It generates and sends a notification to the Portfolio Super User or the user who issued the deactivation request.

B.1.4 Inform Author About Portfolio Assignment

This workflow is triggered when a viewer is assigned to a portfolio. It generates a notification containing the viewer details, which is sent to the portfolio author.

B.1.5 Notify Viewers of Portfolio Assignment

This workflow is triggered when a viewer is assigned to a portfolio. It generates a notification containing the portfolio details, which is sent to the viewers.

B.1.6 Assignment Removal Notification Workflows

Each viewer has an access list that displays the portfolios the view has access to. A workflow is triggered when a viewer removes a portfolio from the access list. The workflow triggered depends on who assigned the portfolio to the viewer. If the portfolio was assigned by the portfolio author, the A*ssignment Removal Notification: Author* workflow is triggered. Alternatively, if the portfolio was assigned by the career administrator, the A*ssignment Removal Notification: Career Center* workflow is triggered.

Each workflow generates a notification containing the viewer and portfolio details. Depending on the workflow triggered, the notification is sent to the portfolio author or career administrator.

B.1.7 Add Non-registered Viewers Workflow

This workflow is triggered when a non-registered viewer is assigned to a portfolio.

Glossary

Account Type

Account that is associated with a particular role or function such as portfolio owner, faculty, career manager, potential employer, and portfolio viewer.

Business Event

A business event is an occurrence in an internet or intranet application or program that might be significant to other objects in a system or to external agents. The approval of a new template or a new account are examples of business events.

Layout

Configuration of a template.

Portfolio

A collection or content repository for work or materials.

Portfolio Administrator

A responsibility designated for managing accounts and public artifacts, as well as the creation of organizations, organization addresses, contacts, and templates.

Portfolio Career Administrator

A responsibility assigned to the institution's Career Counselor or Coordinator allowing the individual to assigns access privileges to portfolio reviewers.

Portfolio Type

Type of work material, such as Presentation.

Portfolio Owner

A user who creates and publishes portfolios.

Portfolio Viewer

A user who is granted access to view and comment on a portfolio's contents.

Responsibility Mapping

Association of responsibilities to account classifications.

Template

Mechanism or tool to layout a page or to create or update folder configurations.

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