BEAAquaLogic®
Pages

Administrator Guide

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Welcome to AquaLogic Pages

This book describes how to manage AquaLogic Pages content and security and how to maintain Pages. Pages administrators should read this book to understand how Pages can best be utilized by your company, to determine what custom data you want to make available through Pages.

How to Use This Book

Audience

This guide is written for the users responsible for managing and maintaining Pages.

Organization

This guide includes the following chapters:

- This chapter provides information on how to use this guide and describes other resources available to help manage and maintain Pages.

- Chapter 2, "Getting Started with AquaLogic Pages," briefly describes Pages, the objects you can create in Pages, how to work in the user interface, and provides a use case scenario.

- Chapter 3, "Integrating AquaLogic Pages with the Portal," describes how to access Pages through the Pages Launcher Portlet or through the portal menus and how to display a page component as a portlet in a portal page.

- Chapter 4, "Spaces and Pages," describes how to create pages and organize them into logical groupings, called Spaces.

- Chapter 5, "Components," describes the components you can add to pages and how to use them.

- Chapter 6, "Lists and Records," describes how to create and display data in Pages through lists, including creating your own custom data sources, and how to work with records in lists.

- Chapter 7, "Securing AquaLogic Pages," describes how to secure Pages functionality and objects through roles granted on the AquaLogic Pages application level and on the individual Space level.

- Chapter 8, "Attachments," describes how to incorporate existing attachments into Pages and how to manage those attachments from within Pages.

Typographical Conventions

This book uses the following typographical conventions.

Table 1-1 Typographical Conventions

Convention	Typeface	Examples/Notes
• Items you need to take action on (such as files or screen elements)	**bold**	• Upload **Procedures.doc** to the portal. • To save your changes, click **Apply Changes**.
• User-defined variables • New terms • Emphasis • Object example names	*italic*	• The migration package file is located in *install_dir*\serverpackages. • *Portlets* are Web tools embedded in your portal. • The URI *must* be a unique number. • The example Knowledge Directory displayed in Figure 5 shows the *Human Resources* folder.

• Text you enter
• Computer generated text (such as error messages)
• Code samples
	`computer`	• Type `Marketing` as the name of your community.
		• This script may generate the following error:
		`ORA-00942 table or view does not exist`
		• Example:
		
		``
		<setting name="SSOCookieIsSecure">
		
		    <value xsi:type="xsd:integer">
		    </value>
		
		</setting>
		``

• Environment variables	ALL_CAPS	• The default location of BEA_HOME is C:\bea.

BEA Documentation and Resources

This section describes other documentation and resources provided by BEA.

Table 1-2 BEA Documentation and Resources

Resource	Description
Installation Guide	This guide describes the prerequisites (such as required software) and procedures for installing AquaLogic Pages.
	It is available on edocs.bea.com/pages/docs15.
Installation and Configuration Worksheets	These worksheets enable you to record prerequisite information necessary for installing and configuring AquaLogic Pages. Both worksheets are included in one file.
	It is available on edocs.bea.com/pages/docs15.
Release Notes	The release notes provide information about new features, issues addressed, and known issues in the release.
	They are available on edocs.bea.com/pages/docs15 and on any physical media provided for delivering the application.
Online Help	The online help is written for all levels of Pages users. It describes the user interface for Pages and gives detailed instructions for completing tasks in Pages.
	To access online help, click the help icon in the upper right of the Dashboard or any object in page view. You can also access help by clicking the **More Help** link in the editors.
Deployment Guide	This guide is written for business analysts and system administrators. It describes how to plan your AquaLogic User Interaction deployment.
	It is available on edocs.bea.com/alui/deployment/index.html.
Developer Guides, Articles, API Documentation, Blogs, Newsgroups, and Sample Code	These resources are provided for developers on the BEA dev2dev site (dev2dev.bea.com). They describe how to build custom applications using AquaLogic User Interaction and how to customize AquaLogic User Interaction products and features.

Table 1-2 BEA Documentation and Resources

Resource	Description
AquaLogic User Interaction (ALUI) and AquaLogic Business Process Management (ALBPM) Support Center	The ALUI and ALBPM Support Center is a comprehensive repository for technical information on ALUI and ALBPM products. From the Support Center, you can access products and documentation, search knowledge base articles, read the latest news and information, participate in a support community, get training, and find tools to meet most of your ALUI and ALBPM-related needs. The Support Center encompasses the following communities: **Technical Support** Submit online service requests, check the status of your requests, search the knowledge base, access documentation, and download service packs and hotfixes. **User Group** Participate in user groups; view webinars, presentations, the CustomerConnection newsletter, and the Upcoming Events calendar. **Product Center** Download product updates, service packs, and patches; view the Product Interoperability matrix (supported third-party products and interoperability between products). **Developer Center** Download developer tools, view code samples, access technical articles, and participate in discussions. **Education Services** Review the available education options, then choose courses by role and delivery method (Live Studio, Public Classroom Training, Remote Classroom, Private Training, or Self-Paced eLearning). **Profile Center** Manage your implementation details, local user accounts, subscriptions, and more. If you do not see the Support Center when you log in to http://support.plumtree.com, contact ALUISupport@bea.com or ALBPMSupport@bea.com for the appropriate access privileges.

Table 1-2 BEA Documentation and Resources

Resource	Description
Technical Support	If you cannot resolve an issue using the above resources, BEA Technical Support is happy to assist. Our staff is available 24 hours a day, 7 days a week to handle all your technical support needs.
	E-mail: ALUISupport@bea.com or ALBPMSupport@bea.com
	Phone Numbers:
	USA, Canada +1 866.262.7586 or +1 415.263.1696
	EMEA +44 1494 559127
	Asia Pacific +61 2.9931.7822
	Australia/NZ +61 2.9923.4030
	Singapore +1 800.1811.202

Getting Started with AquaLogic Pages

This chapter briefly describes Pages, the objects you can create in Pages, how to work in the user interface, and provides a use case scenario.

Overview of AquaLogic Pages

Pages is a web page authoring system and application builder that provides even non-technical end-users a simple way to create web pages, blogs, wikis, and other web applications. Because of its ease of use, anyone with the proper permissions can create ad-hoc, collaborative workspaces without having to rely on an IT or portal administrator to do it for them. Because objects in the system are versioned, you can allow everyone (with the proper permissions) to confer their knowledge and ideas directly to the Pages system, enabling much more rapid and complete knowledge transfer and collaboration.

Plus, unlike traditional wikis, Pages allows you to surface data from existing enterprise systems via RSS, web services, or by creating custom data sets. This allows you to reuse existing data and quickly collect new data, all of which users can contribute to by adding comments, page components, or attachments.

Pages Objects

Web pages created through AquaLogic Pages are grouped into logical collections called *Spaces*. For example, you might create a Space for a sales team with separate pages for new products, sales tools, leads, promotions, and reports. Each page is made up of *components* such as rich text, images, record lists, or tables. The record lists and tables are backed by *lists*. A list is a set of data (in the form of *records*) from a custom data model stored in the Pages repository. For example, you might create a products list that includes a record for each product.

Note: For more information on an object, see the associated chapter in this guide.

Accessing Pages Content

There are several ways to access Pages content:

- You can access the Dashboard or a favorite Space through the Pages Launcher Portlet. For information on using the Pages Launcher Portlet, see "The Pages Launcher Portlet" on page 3-2. For a description of the Dashboard, see "The Dashboard" on page 2-3.

- You can access the Dashboard or a particular Space through the Spaces menu in the portal navigation. For information on enabling the Spaces menu, see "Displaying a Spaces Menu in Portal Navigation" on page 3-2. For a description of the Dashboard, see "The Dashboard" on page 2-3.

- You can view content from page components in portlets placed on My Pages or community pages. For information on creating page component portlets, see "Page Component Portlets" on page 3-6.

- You can access any Space, page, or list with their URLs. When you create a Space, page, or list, you can use the default URL or specify a custom URL that enables users to access the object directly.

- While viewing Pages objects, you can also access the Organizer, which provides a generalized interface for browsing, searching for, and managing Spaces, pages, attachments, records, and lists. For more information on the Organizer, see "The Organizer" on page 2-5.

Note: For more information on navigating Pages, see the online help.

The Dashboard

The Dashboard is the home page (default page) for the Pages application. It provides a list of most-recently created or modified Spaces. The Dashboard also provides links to create a new Space and create or access your personal blog.

The Dashboard has two tabs:

- **My Favorites**: displays Spaces you have designated as favorites. If you have designated at least one Space as a favorite, you see the My Favorites tab by default. For more information on favorites, see Adding and Removing Favorites.

- **Everything**: displays recently created or modified Spaces. If you have not designated any Spaces as favorites, you see the Everything tab by default.

The Dashboard provides the following additional functionality to help you find what you are looking for: sort, text search, and filter by last modified date. For more information on these features, see the online help.

Note: For more information on the Dashboard, see the online help.

Viewing Spaces

To view a Space, click the Space name. The Space opens in *page view* (described later), in which you can view the Space, and, if you have appropriate access, edit the Space (for example, change settings or add text or images).

Adding and Removing Favorites

To help you locate the Spaces you use on a regular basis you can designate particular Spaces as favorites.

- To designate a Space as a favorite, click ✧ next to the Space name.

  Note: You can also add a Space to your list of favorites while viewing the Space by clicking **Add to Favorites**.

- To remove a Space from your favorites, click ★ next to the Space name.

  Note: You can also remove a Space from your list of favorites while viewing the Space by clicking **Remove from Favorites**.

Note: Your personal blog is automatically designated as a favorite.

Subscribing to Email Notifications for Spaces

You can receive email notification when a particular Space is updated.

- To subscribe to a Space, click [icon] next to the Space name. In the pop-up box, select whether you want to be receive one email a day with a summary of all the changes (**Daily Summary Email**) or want to receive an email of each change as soon as it is made (**Immediate Email**), then click **OK**.

  Note: You can also subscribe to a Space while viewing the Space by clicking **Subscribe**.

- To unsubscribe from a Space, click [icon] next to the Space name. In the pop-up box, select **Unsubscribe** then click **OK**.

  Note: You can also unsubscribe from a Space while viewing the Space by clicking **Unsubscribe**.

Note: You can only receive notifications for Spaces to which you have at least Guest access.

Getting RSS Feeds for Spaces

You can subscribe to an RSS feed so that any changes made to a particular Space display in your personal RSS feed. You can access your personal RSS feed through the Dashboard by clicking

[icon] next to the search box.

- To view an RSS feed for a particular Space, click [icon] next to the Space name. To subscribe

  to the RSS feed, on the RSS feed page, click [icon] **Subscribe to this feed**.

  Note: You can also subscribe to an RSS feed for a Space while viewing the Space by clicking **RSS**.

Notes:

- You can only view RSS feeds for Spaces to which you have at least Guest access.

- Any Spaces you designate as favorites are automatically added to your personal RSS feed.

Personal Blogs

If you have the proper AquaLogic Pages role and personal blogs are enabled in your system, you can create a personal blog. A blog is an online journal or chronological publication of comments and information. To create a personal blog, on the Dashboard, click **Go to My Blog**.

After you have created a personal blog, you can access it through the Dashboard by clicking **Go to My Blog** or by clicking your blog Space (**Personal Blog for *Your_User_Name***) on the My Favorites tab.

The Organizer

The Organizer displays objects grouped by type: Spaces, pages, attachments, lists, and records. You can click an object to view it, or perform an action on the object such as viewing information and settings for the object, editing the object, or deleting the object. The Organizer also enables you to search and filter the objects.

To view or edit an object, click the object name. The object opens in *page view* (described later), in which you can view the object, and, if you have appropriate access, edit the object (for example, change settings or add text or images).

The Organizer provides the following functionality to help you find what you are looking for: description and title search, filter by object type, filter by last modified date, group by object type or associated space, sort by rank, sort by title, sort by creation date, and sort by last modified date.

Note: For more information on the Organizer, see the online help.

Page View

When you click an object, the object opens in *page view* (there are a few exceptions noted below). Basically, Pages automatically creates a page and displays the object. This enables you to add additional content to the object just like any other page. For example, you can add a comment, an image component, rich text, or an attachment. The page for the object is not saved unless you save the page. If you save the page, the additional content appears whenever anyone opens the object in page view. For example, if you are viewing a record list and click a record, the record opens in page view. If you add an image to the page and save the page, anyone who views the record in page view will see the image.

Notes:

- A Space cannot be viewed in page view. When you navigate to a Space, the home page is displayed.

- A page component cannot be viewed on its own in page view, only as part of a page.

- Records do not always open in page view. In a Master/Detail table or a Spreadsheet table the record details display in the table rather than in page view. Therefore, you cannot view components, comments, or attachments associated with a record that you access from a Master/Detail table or a Spreadsheet table.

- Attachments in page view work differently than other objects; see Chapter 8, "Attachments," and the online help.

- For information on who can perform actions on pages, see "Space Roles" on page 7-2.

- For more information on pages (including objects in page view), see "Pages" on page 4-3 and the online help.

Page Components

You can add content to an object in page view by double-clicking the component icon or dragging component icon from the palette onto the page. The following components are available:

Table 2-1 Available Page Components

Component	Description
Blog List	Enables you to add a blog to the page. A blog is an online journal or chronological publication of comments and information. Blogs are generally updated frequently and can be an efficient communication tool for small groups or to disseminate knowledge to a group.
Image	Enables you to add an image to the page. You can use an uploaded image or point to a URL.
Record List	Enables you to add a list of records to the page. A record list enables users to search for and view records. Users with the proper permissions can also edit, add, and delete records.
Rich Text	Enables you to add formatted text to a page.
RSS Feed	Enables you to add an RSS feed to the page. For example, you might want to display recent news articles discussing your product or company.
Table	Enables you to add a table of records to the page. A table enables users to search for, sort, and view records. Users with the proper permissions can also edit, add, and delete records.

Note: For more information on page components, see Chapter 5, "Components," and the online help.

Comments

At the bottom of the page you can add comments, and engage in message-board style discussions, in the context of any object in page view. This provides a simple way for users to provide structured feedback on the page or comment on content (for example, commenting on a particular blog post).

Notes:

- For information on who can work with comments, see "Space Roles" on page 7-2.

- For more information on comments, see the online help.

Associated Objects

In page view, you see pages, attachments, and lists associated with the Space you are viewing or associated with the parent Space.

Attachments

Although you can add content to pages using rich text and page components, you might also want to add existing content (for example, Word documents or PowerPoint presentations). You can add this existing content by adding attachments to objects in page view. After adding an attachment, users can view the attachment or upload new versions of the attachment.

Notes:

- For information on who can work with attachments, see "Space Roles" on page 7-2.

- For more information on attachments, see Chapter 8, "Attachments," and the online help.

Versions

Each time a page view is saved, a new version is stored in the system. These versions are displayed in the page view making it easy for users to view a previous version, and, with the proper permissions, revert to the version or delete the version. Because each change is saved as a version and it is easy to revert to a previous version, users can feel free to make changes without having to worry about inadvertently causing issues on the page.

Note: For more information on versions, see "Page Versions" on page 4-6, Chapter 8, "Attachments," and the online help.

Use Case

This is a simple example of how Pages can be used to improve the ability for a customer support team to respond to a critical support situation.

1. A support engineer creates a new "Support Issues" record list, which displays a list of support incidents for a single customer.

2. An account manager, who is largely responsible for customer satisfaction for this individual account, creates a new "Issue Tracking" Space for assembling all the information related to this specific customer and this specific issue. The information will be assembled by an extended team of participants related to the account or related to resolving the issue.

3. The account representative opens the Space and types a list of "action items" and owners for each action needed for the support team to address.

4. A customer service representative opens the Space and adds a "Support Team" Table component to the page. She points this component to the existing "Employee Contacts" list.

5. A product engineer creates a "Customer Issue Resolutions" RSS feed component, which displays an RSS feed listing blog entries from the support department's knowledge base, related to resolving similar issues.

6. Another product engineer opens the Space adds a "Best Practices" record list component to the page, pointing it to the existing "Customer Issues Resolutions" list from step 5.

7. The support engineer opens the Space and adds a "Customer Issues" record list component to the page, pointing it to the existing "Support Issues" list from step 1.

At this point, our simple "Issue Tracking" Space has several components:

- Action items listed in free-form text

- Table of support team members and their contact information

- List of the customer's issues and prior resolution status

- List of best practices from the company knowledge base

8. After some research, the product engineer opens the Space, clicks the associated item in the Best Practices list to display the issue resolution record and adds some unstructured notes under the record, specifying specific resolution steps.

9. The support engineer sends the resulting resolution steps to the customer to resolve the issue.

Integrating AquaLogic Pages with the Portal

This chapter describes how provide an integrated experience between Pages and the portal. It includes the following sections:

- The Pages Launcher Portlet - describes how to access Pages through the Pages Launcher Portlet

- "Displaying a Spaces Menu in Portal Navigation" on page 3-2 - describes how to display a Spaces menu in the portal navigation

- "Page Component Portlets" on page 3-6 - describes how to display a page component as a portlet in a portal page

- "Blog Portlets" on page 3-7 - describes how to create a blog portlet to display in a portal page

- "Wiki Portlets" on page 3-7 - describes how to create a wiki portlet to display in a portal page

- "Navigation in Pages" on page 3-7 - describes how to customize the navigation that displays in Pages

- "Crawling Pages Content" on page 3-8 - describes how to crawl Pages content into the portal directory

The Pages Launcher Portlet

The Pages Launcher Portlet displays links to the Dashboard and other favorite Spaces. This portlet is created in the Pages Objects folder when you import the Pages migration package (as described in the *Installation Guide for AquaLogic Pages*).

Note: Only Spaces you have designated as favorites appear in the portlet.

To provide access to Pages, add this portlet to a community page, tell users to add the portlet to their My Pages, or make the portlet mandatory for some groups so that it automatically shows up on the users' My Pages. You must have at least Select access to a portlet to add it to a My Page or community page.

Note: For information on changing access privileges, making a portlet mandatory, or adding a portlet to a My Page or community page, refer to the portal online help.

Displaying a Spaces Menu in Portal Navigation

You can add a menu (just like the My Communities menu) to display available Spaces in the portal navigation.

Note: Only Spaces to which the user has access appear in the menus.

You must perform the following steps to display the Spaces menu:

1. Add the Spaces navigation tag to a custom header. There is a sample header code file installed with Pages: *install_dir*\pages\1.5\header_with_pagestags.html (for example, C:\bea\alui\pages\1.5\samples\header_with_pagestags.html). For information on creating your own custom header using the Pages navigation tags, see the *AquaLogic User Interaction Development Documentation* Adaptive Tags: Pages.

2. Create a remote portlet web service that points to the custom header you created. For instructions on creating a remote portlet web service, see the *Administrator Guide for AquaLogic Interaction* and the portal online help.

3. Create a portlet based on the remote portlet web service. For instructions on creating a portlet, see the *Administrator Guide for AquaLogic Interaction* and the portal online help.

4. Create an experience definition that uses the custom header portlet. For instructions on creating an experience definition, see the *Administrator Guide for AquaLogic Interaction* and the portal online help.

5. Create an experience rule that displays the experience definition. For instructions on creating an experience rule, see the *Administrator Guide for AquaLogic Interaction* and the portal online help.

    Note: If there are any other experience rules defined, you might need to move the experience rule you just created up in the list so that the rule will apply. For information on how experience rules are applied, see the portal online help.

6. Verify that the Spaces menu is displaying properly. Log off and log back in as a user that should see the Spaces menu.

Troubleshooting the Spaces Menu

If the Spaces menu is not showing up, perform the following steps:

1. Start AquaLogic Interaction Logging Spy and confirm that logging is enabled.

2. Log out of the portal.

3. Clear the AquaLogic Interaction Logging Spy log.

4. Log back in to the portal.

    Note: If you just refresh the page without logging out and logging back in, the page will use cached data, and any errors that occur when the navigation tags execute the request to the Pages server will not display in AquaLogic Interaction Logging Spy.

5. Look in the log under Portal application for any errors from the PagesIntegration component.

    If there are no errors from the PagesIntegration component, check the settings described in Verifying Navigation Settings. (You will probably see two other tag errors regarding not being able to find data tags, this is due to the Pages tags not functioning properly.)

    If there are errors from the PagesIntegration component, refer to "Typical Errors" on page 3-5.

Verifying Navigation Settings

If your Spaces menu is not displaying in the portal navigation and AquaLogic Interaction Logging Spy does not display any PagesIntegration component errors:

*   Verify that you are really logged in as a user that views the Tag Navigation Experience Definition. You should see a blue banner. If you see a white banner with the AquaLogic liquid image, you are logged in as a user that views the Pluggable Navigation. Review the

Experience Definition Rules to ensure that the Tag Navigation Experience Definition is being used for the user you used to log in.

● Verify that the Pages navigation tag was added to your custom header. Open your custom header file and search for `pt:pages.livespacesdata`.

If you *do* find this entry, continue with the next step.

If you *do not* find this entry, the Pages navigation tag was not added to your custom header. See the *AquaLogic User Interaction Development Documentation* Adaptive Tags: Pages.

● Verify that the experience definition you are viewing uses header.html. Add some random text to the top of header.html, save the file, and reload the portal page.

If you see the random text at the top of the page, remove the random text from header.html, save the file, and continue with the next step.

If you do not see the random text, the experience definition you are viewing is not using header.html as its header portlet. Verify that there is not a higher priority experience definition that is being used for the user. If there is a higher priority experience definition, move the rule that uses the Tag Navigation Experience Definition higher up in the rules list. If there is not a higher priority experience definition, continue with the next step.

● Verify that the Pages navigation tag is being transformed. View the source for the portal page, and search for `pt:pages.livespacesdata`.

If you do not find this entry, the Pages navigation tag is being transformed. Skip to step l.

If you do find this entry, the Pages navigation tag was not properly deployed to the portal. Verify that the Pages Portal Extensions component was installed on the portal. If it was installed, continue with the next step. If it was not installed on the portal, refer to the *Installation Guide for AquaLogic Pages* for instructions.

● Verify that the custom tag libraries are properly deployed.

   – On a Java portal, look for `taglibPages.jar` in *install_dir*/ptportal/6.5/lib/java and look for the `WEB-INF/lib` folder reference in *install_dir*/ptportal/6.5/webapp/portal.war. Use WinZip or WinRAR to view the contents of the .war file. If you run the portal on BEA WebLogic, you also need to open portal.ear and verify the content of portal.war inside the .ear file. With portal on WebLogic server, ensure that you updated the portal deployment after installing the Portal extensions.

   – On a .NET portal, look for `taglibPages.dll` in *install_dir*/ptportal/6.5/bin/assemblies and *install_dir*/ ptportal/6.5/webapp/portal/web/bin.

● Verify that the Pages tag library is defined as a custom tag library. Open *install_dir*/settings/portal/CustomTags.xml. Verify that it contains the following entry:

```
<libfile name="taglibPages"/>
```

Typical Errors

Typical errors include:

● Portlet exceptions: These are usually due to the Pages server being unavailable. Verify that the BEA AL Pages service is running.

● IDK exceptions: These are usually due to the BEA ALI API service not running or not being configured correctly in the portal. Verify that the BEA ALI API service is running. To verify that it is configured correctly in the portal:

    a. Log in to portal as an administrator.

    b. Click **Administration**.

    c. In the Select Utilities menu, click **Portal Settings**.

    d. In the Portal Settings Editor, on the left, under Edit Utility Settings, click **Portal URL Manager**.

    e. Copy the **Soap Server URL** value and paste it into a web browser. The page that appears should be titled QueryInterfaceAPI. If this is not the case, correct the URL in the Portal Settings Editor.

● OpenKernel exceptions: These are usually due to the adaptive tags not being able to find a setting in *install_dir*/settings/configuration.xml. Verify that the Configuration Manager was installed properly and that the configuration.xml file exists.

● ObjectManager exceptions: These are usually due to problems with the Pages objects that were imported into the portal from the migration package. To correct the problems:

    a. Log in to the portal as an administrator.

    b. Click **Administration**.

    c. Open the Pages Objects folder. If it does not exist, refer to the *Installation Guide for AquaLogic Pages* for instructions on importing the migration package.

    d. Expand the web services, and open the Pages Spaces Web Service.

e. In the Web Service Editor, on the left, under Edit Standard Setting, click **Properties and Names**, and write down the UUID.

f. Open *install_dir*/settings/configuration.xml in a text editor.

g. Search for `SpacesListWebServiceUUID` and verify that the value matches the Pages Space Web Service UUID you wrote down. If it does not match, correct the value in the file and save the file.

Page Component Portlets

You can create a portlet from an existing page component, allowing you to display content from a page component in a portal page.

Notes:

- Only users who have permission to see the page component will be able to see the content in the portlet. Users must have at least the Guest role on the associated Space.

- Rich text components and image components will not display correctly.

- If the page component is deleted, the portlet will display an error.

1. Click **Administration**.

2. Open the administrative folder in which you want to create the portlet.

3. Click **Create Object →Portlet**.

4. In the Choose Template or Web Service dialog box, select **Pages Components Selector** and click **OK**.

5. Next to Configure this Portlet, click **Edit**.

6. In the Portlet Wizard:

   a. Select the Space which includes the page component you want to use.

      Note: You can only choose from Spaces you have permission to see.

   b. Select the page component you want to use.

   c. Click **Finish**.

7. In the Portlet Editor, click **Finish**.

8. In the Save Object dialog box, type a name for the portlet and click **Save**.

9. In the Object Saved dialog box, click **Close**.

You can now add the portlet to a portal page.

Blog Portlets

You can add a blog portlet to a portal page. A blog is an online journal or chronological publication of comments and information. Blogs are generally updated frequently and can be an efficient communication tool for small groups or to disseminate knowledge to a group.

To add a blog portlet, select the Blog portlet as you would any other portlet. For information on adding a portlet to a page, see the portal online help.

Wiki Portlets

You can add a wiki portlet to a portal page. A wiki enables you to add and edit content in-place.

To add a wiki portlet, select the Wiki portlet or the Wiki w/ Comments portlet as you would any other portlet. For information on adding a portlet to a page, see the portal online help.

Navigation in Pages

By default, Pages uses the same navigation as the portal, though Pages displays only a portion of that navigation. Pages displays only the horizontal drop-down menus (not the links at the top of the page or the banner). If you use a left vertical navigation scheme or custom navigation with a header portlet that does not display horizontal navigation, you *must* customize the navigation for Pages. If you want Pages to display different navigation than the portal, you also need to customize the navigation.

To use a different standard navigation scheme for Pages:

1. Create an experience definition that uses a supported navigation scheme. In the Experience Definition Editor, on the Edit Navigation Options page, select the navigation scheme to use for Pages. The following standard navigation schemes are supported in Pages: Horizontal Combo Box Drop-Down Navigation, Mandatory Links Only, No Navigation, and Horizontal Drop-Down Navigation.

2. Create an experience rule for Pages that uses the experience definition you created. Add a URL condition with the following value: *`Pages_host:Pages_port`/pages* (for example, *pages.company.com:11990/pages*).

To customize the navigation for Pages using a header portlet:

1. Create a header portlet that displays horizontal navigation. For information on creating a custom header portlet, see the *AquaLogic User Interaction Development Documentation Adaptive Tags: Implementing Custom Navigation*.

    Note: Left vertical navigation schemes are not supported in Pages. The top bar and banner sections of header portlets are not displayed in Pages.

2. Create an experience definition that uses the header portlet you created. In the Experience Definition Editor, on the Choose Header, Footer & Style page, select the header portlet you created. On the Edit Navigation Options page, select Portlet-Ready Navigation.

3. Create an experience rule for Pages that uses the experience definition you created. Add a URL condition with the following value: *Pages_host:Pages_port/pages* (for example, *pages.company.com:11990/pages*).

For information on creating experience definitions or experience rules, see the *Administrator Guide for AquaLogic Interaction* or the portal online help.

Note: Experience definition rules applied to a community do not apply to Pages, even if the user navigates to Pages from that community.

Crawling Pages Content

You can crawl content from Pages as you would any other content source. You can import the following content from Pages:

- Comments: Comments are indexed, but not imported as separate documents. If you search for a comment your results will include pages that include the comment. If you click a result, you see the page in the Pages application.

- Rich Text Components: The html-escaped content of all rich text components in a page is crawled. As with comments, the content is indexed rather than crawled as a separate document.

- Attachments: Attachments are imported as separate documents and indexed. Office and PDF documents are indexed by the appropriate portal accessor. Clicking an attachment in the Knowledge Directory takes you to the page view of the attachment in the Pages application.

- Tables and Record Lists: Each record in a table or record list is imported as a separate document and indexed. Although content from non-local data sources is imported, this content may be out of date quickly based on the data source's expiration time. Clicking a

record in the Knowledge Directory takes you to the page view of the record in the Pages application. Each field value in the record is crawled in as they display in the record list; that is, users will be crawled in as the user's display name and not the UUID, and dates will be returned as the corresponding date and not a long number.

Field values can be searched via advanced search if the title of the field is the same as the name entered in the Global Document Property Map. The content crawled from rich text fields is html-escaped.

To crawl Pages content:

1. Create a content source based on the Pages Crawler Web Service and using the Pages Crawler credentials that are set in Configuration Manager.

2. Create a crawler based on the content source you just created, selecting the Space you want to crawl for content.

   Note: The Spaces listed are those that are accessible by the default administrator set in Configuration Manager. If you change these credentials you must restart the BEA AL Pages service for Pages to read the new credentials.

3. If you want to import security with each document, you must make sure that the appropriate groups are mapped in the Global ACL Sync Map.

4. Add the crawler to a job and run the job.

Spaces and Pages

This chapter describes how to create pages and organize them into logical groupings, called Spaces.

Spaces

A Space is a logical collection of individual pages. For example, you might have a Marketing Space that included the following pages: Collateral, Events, and Writing and Design Resources.

Space Security

Only users that have the Administrators or Space Creators AquaLogic Pages role can create Spaces. They see the **Create a Blank Space** link in the Dashboard. For information about AquaLogic Pages roles, see "AquaLogic Pages Roles" on page 7-1.

Each Space includes security so you can control which users can view or edit the pages and any other objects associated with the Space. Users who are allowed to edit the pages can add or edit content enabling rapid knowledge transfer. Because each page is versioned, and you can easily revert to a previous version, you can be a bit more relaxed with who is allowed to edit content.

You set security by assigning roles to users and groups. These roles apply to every object associated with the Space (pages, attachments, and components). For a description of the available roles and what privileges these roles provide, see "Space Roles" on page 7-2.

Creating a Space

Before you create a Space, think about the purpose of the Space and the pages you might include. Consider which users and groups should be allowed to view, comment on, create, edit, and delete the Space and all the objects associated with the Space.

To create a Space:

1. Navigate to the Dashboard.

2. Click **Create a Blank Space**.

3. On the General Settings page, type a name and description for the Space and edit the default URL if desired. Then click **Next**.

4. On the Security page, assign roles to users and groups based on the security decisions you made before creating the Space.

5. Click **Finish**.

6. Design your home page (the default page for the Space) and any additional pages you want to include in this Space.

For more information on the Space Editor and creating Spaces, see the online help.

Note: If your administrator has enabled personal blogs and you have the proper permissions, you can create a personal blog Space. For information on personal blogs, see "Personal Blogs" on page 2-5.

Viewing a Space

When you navigate to a Space, the home page appears. You can navigate to a Space several different ways:

- Click the Space in the Dashboard.

- Click the Space in the Organizer.

- Click the Space in the Spaces portal menu.

- Click a link to the Space or enter the URL to the Space in your browser's address bar.

Editing a Space

Use one of the following methods to edit a Space:

- Navigate to the Space, click **Edit Space Settings**.

- From the Organizer, select the Space and click **Info & Settings**.

Deleting a Space

When you delete a Space, it deletes all objects associated with the Space, including all the pages in the Space and any components and attachments added to those pages. There is no way to recover the Space or any associated objects after deleting it.

Use one of the following methods to delete a Space:

- Navigate to the Space, click **Edit Space Settings**, then, in the Space Editor, click **Delete**.

- From the Organizer, select the Space and click **Delete**.

Pages

Users of all experience levels can design a page simply by dragging different types of page components (for example an image or a table) onto the page and add text by typing in a rich text editor.

Access to each page is controlled by the associated Space security. Users who are allowed to edit the pages can add or edit content enabling rapid knowledge transfer. Because each page is versioned, and because it is so easy to edit anything, users are compelled to contribute, participate, and when necessary, correct others' contributions.

Creating a Page

Before you create a page, think about what content you want to include on the page, how you want the content to be laid out, and whether the content should all be on the same page or on several different pages.

To create a page:

1. Navigate to the associated Space.

2. Click **Add a New Page**.

3. On the General Settings page, type a name and description for the page and edit the default URL if desired. Click **Finish** to create a page using the Basic Template or click **Next** to select another template.

4. On the Page Template page, select the basic column layout for the page:

   – **Basic Template:** a one-column page

   – **Two Column (Wide Narrow) Template:** a two-column page with a wide column on the left and a narrow column on the right

   – **Two Column (Narrow Wide) Template:** a two-column page with a narrow column on the left and a wide column on the right

   – **Two Column Template:** a two-column page with two equal columns

   – **Three Column Template:** a three-column page with a narrow column on the left, a wide column in the middle, and another narrow column on the right

   The Page Template tab does not display when you are editing a page, so you cannot change the template after creating the page; therefore, make sure you choose a template that is appropriate for the content you want to include on the page.

   Note: For information on how column layout affects page component placement, see "Component Placement" on page 5-2.

5. Click **Finish**.

6. Add text and page components to the page.

Notes:

- For more information on the Page Editor and creating pages, see the online help.

- For more information on adding text and components to pages, see Chapter 5, "Components," and the online help.

Viewing a Page

You can navigate to a page several different ways:

- Navigate to the associated Space and click the page name in the **Pages in <Space Name>** area.

- Click a link to the page or enter the URL to the page in your browser's address bar.

When you are viewing a page, you can perform actions that do not alter the actual contents of a given page. For example, you can add comments, add attachments, create new pages, and work with content in record lists and tables.

Notes:

- For information on who can perform actions on a page, see "Space Roles" on page 7-2.

- For more information on comments, see "Comments" on page 2-7 and the online help.

- For more information on attachments, see "Attachments" on page 2-7, Chapter 8, "Attachments," and the online help.

- For more information on working with content in record lists and tables, see "Record List Components" on page 5-6, "Table Components" on page 5-8, and the online help.

Editing a Page

When you are viewing a page or an object in page view, there are several ways you can edit the page:

- You can click the **Edit Text** tab to add, edit or delete rich text on the page.

  When you display the Edit Text tab, the cursor is automatically placed in a text component on the page. The Edit Text tab page enables you to type rich text (including formatting and links) directly onto the page.

- You can click the **Add Component** tab to add, edit, delete, or move components on the page.

  Note: You can also display the Add Component tab page by selecting the page in the Organizer and clicking **Edit**.

  When you display the Add Component tab page you can drag components onto the page to the location you want. When you drop the component where you want it, a dialog box prompts you for a title and description for the component. If the component relies on a list, you must also create a new list or select an existing list.

- You can add comments to the bottom of the page by clicking **Add a Comment**.

- You can add attachments to the page by clicking **Add an Attachment**.

Notes:

- When you add components to an object in page view, you can only add them below the object. For example, if you are adding components to a record, the record always appears at the top of the page and any additional components appear beneath the record.

- For information on who can edit a page, see "Space Roles" on page 7-2.

- For more information on editing a page, see Chapter 5, "Components," and the online help.

Saving a Page

When you make a change to a page or an object in page view (by adding, editing, deleting, or moving a component or text) you must save the page if you want other users to be able to see your changes. When you save the page a new version is created.

Deleting a Page

When you delete a page, it deletes all objects associated with the page, including any components and attachments added to the page. There is no way to recover the page or any associated objects after deleting it.

Note: Lists associated with components on the page will not be deleted.

Use one of the following methods to delete a page:

- Navigate to the page, click **Change Page Settings**, then, in the Page Editor, click **Delete**.

- From the Organizer, select the page and click **Delete**.

Note: You cannot delete the home page (default page) for a Space.

Page Versions

Note: For information on attachment versions, see Chapter 8, "Attachments."

Each time you save a page or an object in page view a new version is created (versions are listed under Recent Changes). This allows you to easily see what changes were made and revert to a previous version if necessary.

What is Saved with a Version

The following changes/settings *are* saved with a version:

- Page settings

- Component settings

- Component placement

- Text (in a rich text component)

- Version comment (when you save a page you are prompted to enter a version comment that can help other users understand what changes you made)

The following changes/settings *are not* saved with a version:

- Comments

- Attachments (attachments are versioned independently)

- Data in record lists and tables

Viewing a Previous Version

To view a previous version of a page or an object in page view, click the version number. When viewing a previous version you can revert to that version or delete the version.

Reverting to a Version

When viewing a previous version of a page or an object in page view, you can revert to that version. When you revert to a previous version, the previous version is saved as a new version, so you do not lose any version history. For example, if you revert from Version 10 to Version 6, Version 6 gets saved as Version 11. If you later discover that you should not have reverted the page, you can revert back to Version 10.

Deleting a Version

When viewing a previous version of a page or an object in page view, you can delete that version. When you delete a version there will be a hole in your revision history. For example, if you delete Version 3, the list of versions will display: Version 5, Version 4, Version 2, and Version 1. This enables users to see that a given version, which may have had a specific purpose or meaning, was deleted.

Components

This chapter describes the components you can add to pages and how to use them.

Page components are user interface elements that can be added to pages. A page component can display data stored in the Pages repository, static content, or content keyed off of the preferences assigned to the component. You create page components by selecting from a palette of component types and then completing a wizard to define the component instance.

The following components are available by default:

Table 5-1 Available Component Types

Component	Description
Blog List	Enables you to add a blog to the page. A blog is an online journal or chronological publication of comments and information. Blogs are generally updated frequently and can be an efficient communication tool for small groups or to disseminate knowledge to a group. For more information on blog components, see "Blog List Components" on page 5-5.
Image	Enables you to add an image to the page. You can use an uploaded image or point to a URL. For more information on image components, see "Image Components" on page 5-5.
Record List	Enables you to add a list of records to the page. A record list enables users to search for and view records. Users with the proper permissions can also edit, add, and delete records. For more information on record list components, see "Record List Components" on page 5-6.
Rich Text	Enables you to add formatted text to a page. For more information on rich text components, see "Rich Text Components" on page 5-7.

Table 5-1 Available Component Types

Component	Description
RSS Feed	Enables you to add an RSS feed to the page. For example, you might want to display recent news articles discussing your product or company. For more information on RSS feed components, see "RSS Feed Components" on page 5-8.
Table	Enables you to add a table of records to the page. A table enables users to search for, sort, and view records. Users with the proper permissions can also edit, add, and delete records. For more information on table components, including descriptions and examples of the three types of tables, see "Table Components" on page 5-8.

Adding a Page Component to a Page

You can add a component to the bottom of the page by double-clicking the component icon. You can also add a component to a page by dragging the appropriate component icon to the location you want. As you drag the component a blue box serves as a placeholder for the component, and other components move to make room for the new component. When you drop the component where you want it, a dialog box prompts you for a title and description for the component. If the component relies on a list, you must also create a new list or select an existing one.

Component Placement

When you place components next to each other in a row, the row height is based on the height of the tallest component in the row. The horizontal space allotted for each component is divided equally between the components in the row. Components are top and left aligned within their horizontal space in the row. Here is an example:

**Figure 5-1 Example of component placement**
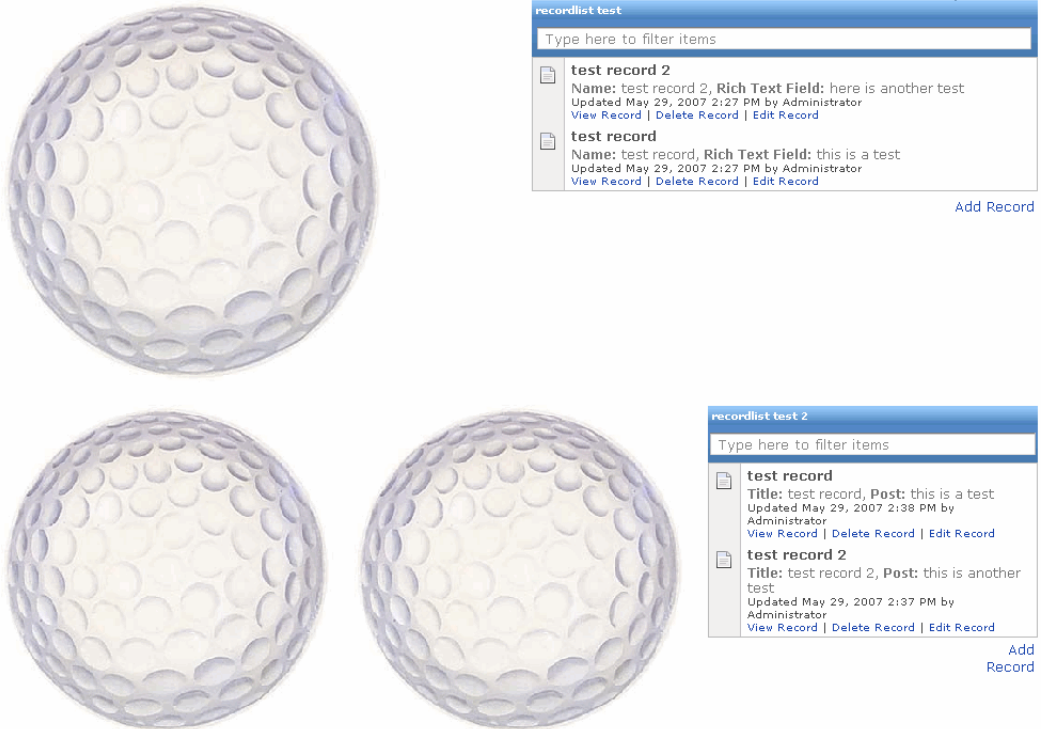
All three golf ball images are the exactly the same, and the two record lists are exactly the same. However, you can see how the sizes of the components change depending on whether there are two or three components in the row. You can also see that the height of the first row is based on the height of the golf ball image, whereas the height of the second row is based on the height of the record list.

If you want a component to span more than one row, you need to place that component in another column. Here is an example:

Figure 5-2 Example of how column layout affects component placement
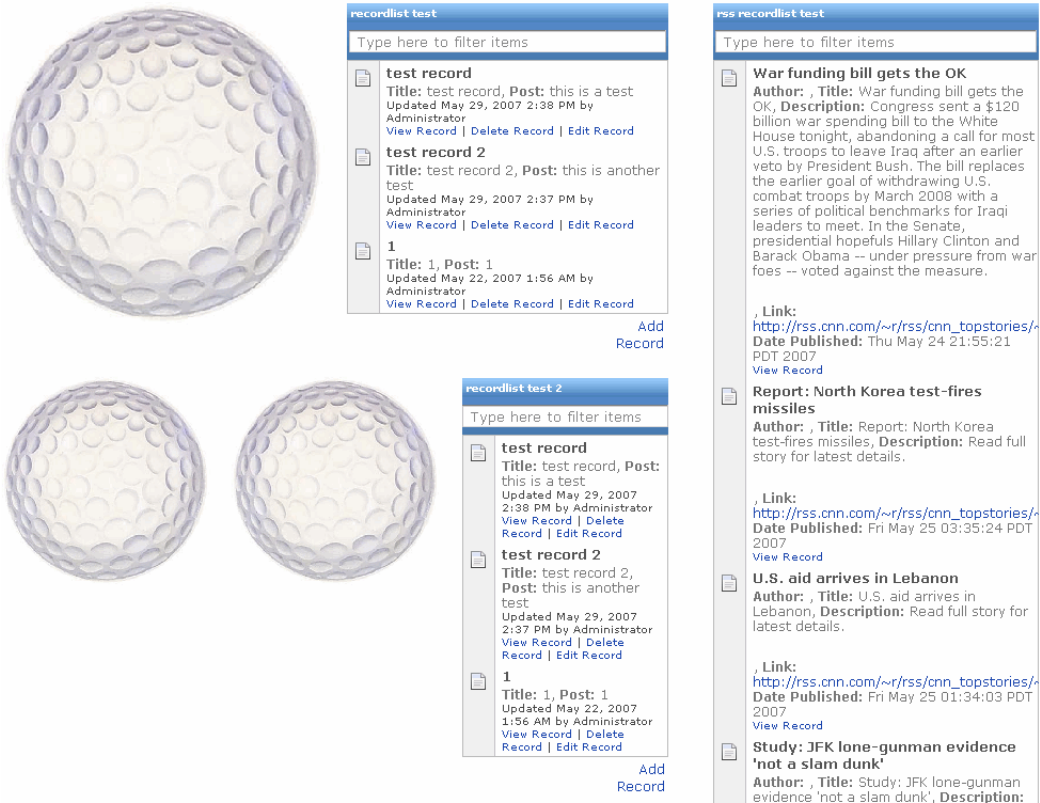
This example is the same as the previous example, but with the addition of another column with a longer record list in it. Because the longer record list is in a different column, it does not affect the height of the rows in the other column (the column containing the golf ball images and shorter record lists).

Editing a Page Component

After placing a component on a page, you can change it by moving it to a new location or changing its settings:

- To move a component, place your pointer over the component's title bar and drag it to a new location.

- To change the settings for a component, click **Edit**.

Deleting a Page Component

If you delete a component from a page, any underlying list and its data remains available in Pages. If you need to retrieve a deleted component, you can revert to a previous version of the page that included the component.

- To delete a component, click **Remove**.

Blog List Components

The blog list component enables you to add a blog to a page. A blog is an online journal or chronological publication of comments and information. Blogs are generally updated frequently and can be an efficient communication tool for small groups.

Note: For more information on blog list components, see the online help.

Image Components

The image component enables you to add an image to the page. You can point to a URL, use an uploaded image, or use an image attached to the page. For example, when viewing a record of a customer issue, you might want to display a screenshot of the issue experienced by the customer.

There are several ways to include an image:

- You can use an image available on the internet by specifying the URL to the image.

- You can use an image from your computer, by uploading the image. Uploaded images are stored in the Pages repository and treated as attachments to pages (just like other attachments).

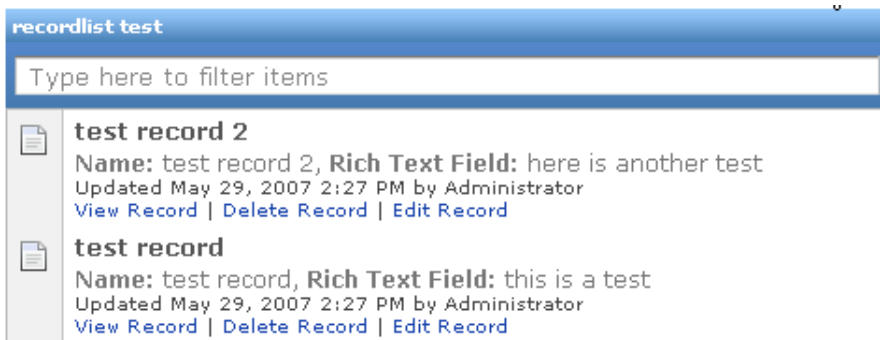- You can use an image that is already attached to the page.

Note: For more information on image components, see the online help.

Record List Components

The record list component enables you to add a list of records from a list to the page. A record list enables users to search for and view records. Users with the proper permissions can also edit, add, and delete records.

Note: For information on working with records, see "Records" on page 6-5.

Here is an example record list:

Record lists are a good way to display data from lists with a significant number of fields (since each field is not represented by a table column) or large amounts of data in some or all of the fields (since the data for each field is not displayed in a single table cell).

Note: For more information on record list components, see the online help.

Rich Text Components

The rich text component enables you to add formatted text to the page. After adding a rich text component, you type your text and then use the formatting toolbar to change the formatting.

Note: Rich text fields in custom lists use the rich text formatting toolbar. However, not all functions are available in rich text fields, as noted in the table.

Table 5-2 Rich Text Formatting Toolbar

Option	Avail. in Rich Text Fields	Description
Font	No	This drop-down list enables you to select from the following fonts: Arial, Comic Sans MS, Courier New, Georgia, Impact, Tahoma, Times New Roman, Trebuchet MS, Verdana, or Webdings.
Size	No	Enables you to select from the following text sizes: xx-small, x-small, small, medium, large, x-large, or xx-large.
Font Color	No	Enables you to set the font color.
Background Color	No	Enables you to set the background color.
Font Formats	Yes	Enables you to apply the following font formats: bold, italic, underline, and strike-through.
Paragraph Formats	No	Enables you to apply the following paragraph formats: Normal, Normal (DIV), Formatted, Address, Heading 1, Heading 2, Heading 3, Heading 4, Heading 5, or Heading 6.
Undo/Redo	No	Enables you to undo or redo your last change.
Paragraph Alignment	Yes	Enables you to apply the following paragraph alignment: left, center, right, justify.
Lists	Yes	Enables you to apply the following list formats: bulleted/unordered or numbered/ordered.
Paragraph Indents/ Outdents	No	Enables you to indent or outdent a paragraph.
Horizontal Rule	No	Enables you to add a horizontal rule.
Edit Margins	No	Enables you to set the margins.

Table 5-2 Rich Text Formatting Toolbar

Option	Avail. in Rich Text Fields	Description
Insert Images/Links/ Tables	Yes	Enables you to insert an images, links, and tables.
Toggle View	No	Enables you to toggle between code and formatted view.
Spell Check	No	Enables you to check spelling.

Note: For more information on rich text components, see the online help.

RSS Feed Components

The RSS Feed component enables you to display data from an RSS data feed in your pages. For example, you might want to display recent news articles discussing your product or company.

Note: Because RSS feed data comes from external systems, it is read-only. However, after you create an RSS feed and its records have been fetched at least once (by a user viewing the feed), the records become part of the search collection and users can add components, text, and attachments to the records. Pages updates the cached records when a record is viewed by a user.

Table Components

The table component enables you to add a table of records from a list to the page. The table automatically includes a column for each field in the associated list. A table enables users to search for, sort, and view records. Users with the proper permissions can also edit, add, and delete records.

Note: For information on working with records, see "Records" on page 6-5.

There are three table modes, all of which enable similar functionality, but in slightly different interfaces. To learn about and see examples of the different table modes, see Table Modes.
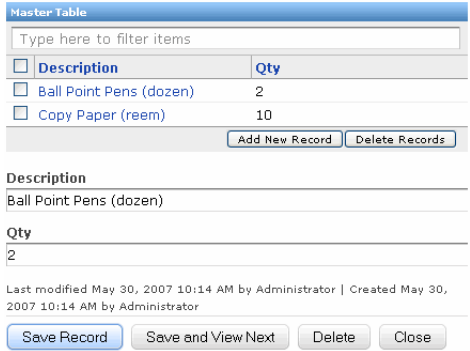
Tables are a good way to display data from lists with a minimal number of fields (since each field is represented by a column) or small amounts of data in the fields (since the data for each field is displayed in a single table cell).
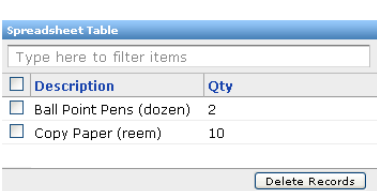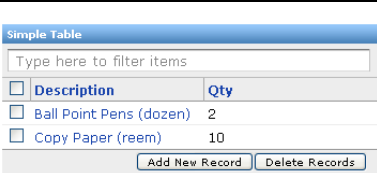
Table Modes

There are three table modes: Master/Detail, Spreadsheet, and Simple. Each table enables users to search for, sort, and view records. Users with the proper permissions can also edit, add, and delete records. The difference between the tables is the user interface.

Note: For information on working with records, see "Records" on page 6-5.

Table 5-3 Available Table Modes

Table Mode	Description	Example
Master/Detail	A Master/Detail table displays the list of records as well as the record details and new record form in the table interface. When a user adds a new record or clicks a record to view or edit the details, the record fields appear below the table. Because the record details appear within the table interface rather than in page view, users will not be able to add additional content (page components, comments, or attachments) to records or see additional content that has been added to a record. If you want users to be able to view and add additional content, choose Simple mode. Use this mode for users who are comfortable filling in fields in a form and when you do not want users to be able to view or add additional content.	

Table 5-3 Available Table Modes

Table Mode	Description	Example
Spreadsheet	A Spreadsheet table displays the list of records in spreadsheet format and enables users to add and edit records in place. As with a Master/Detail table, users will not be able to view or add additional content. If you want users to be able to view and add additional content, choose Simple mode. Use this mode for users who are comfortable working with spreadsheets and when you do not want users to be able to view or add additional content.	
Simple	A Simple table displays the list of records in the table interface. When a user adds a new record or clicks a record to view or edit the details, the record or new record form opens in page view. In page view, users can view and add additional content. Use this mode for users who are comfortable filling in fields in a form and when you want users to be able to view and add additional content.	

Note: For more information on table components, see the online help.

Lists and Records

This chapter describes how to create and display data in Pages through lists, including creating your own custom data sources; it also describes how to work with records in lists.

Lists

A list defines a set of data, made up of *records*. You can create a custom list that stores data in the Pages repository.

Each list is based on a template that defines the configurable properties of the list. Pages includes the following templates:

- Blank/Custom: This template enables you to create a list in which you can define your own fields.

- Contacts: Enables you to create a list for displaying contacts. Contacts lists include the following fields by default: Last Name, First Name, Email, Business Phone, Mobile Phone, Job Title, Address, Web Page, and Notes.

- Events: Enables you to create a list for displaying calendar events. Events lists include the following fields by default: Subject, Location, Start Time, End Time, and Description.

- Issues: Enables you to create a list for displaying issues such as customer support incidents. Issues lists include the following fields by default: Title, Assigned To Status, Priority, Description, Category, Comments, and Due Date.

- Links: Enables you to create a list of links to websites. Links lists include the following fields by default: URL and Notes.

- Tasks: Enables you to create a list of tasks. Tasks lists include the following fields by default: Title, Description, Assigned To, Due Date, Status, and Priority.

Custom Lists

Custom lists enable you to define your own data fields to fit your needs. For example, you might want to create a custom list to track job postings, marketing campaigns, or facilities requests.

Data collected in a custom list is stored in the Pages repository and is therefore editable. For information on how users work with records, see "Records" on page 6-5.

Creating a custom list is simple because you choose from a list of available field types and then specify the properties for each field.

The following field types are available:

Table 6-1 Field Types

Field Type	Description
Text	Enables users to enter small amounts of text.
Long Text	Enables users to enter longer blocks of text.
Rich Text	Enables users to enter formatted text. For information on the formatting options available in a rich text field, see "Rich Text Components" on page 5-7; not all rich text features are available in rich text fields.
Drop-Down	Enables users to select a value from a list. For example, for a support issue priority, you might want to limit values to: Low, Normal, and Urgent.
Dynamic Drop-Down	Enables users to select a value from a list populated by a list. The list is populated with the values from the title field of the specified list. For example, you might point to a list of customer contact info, so users can select from the list of customers.
HyperLink	Enables users to enter text hyperlinks.
Date	Enables users to select a date from a calendar.
Number	Enables users to enter a number.
Currency	Enables users to enter a currency values.
Boolean	Enables you to create a field where users can answer yes or no.
User	Enables users to select from a list of users.

For each field, you define the following properties:

Table 6-2 Field Properties

Field Property	Description
Field Title	This value is displayed as the field label in record entry forms and as the column header in the list, and associated record lists and tables.
Field Type	Enables you to change the type of field.
Values	Enables you to specify the list of values for a drop-down field.
	Note: This property displays only when you select Drop-Down as the field type.
Current List	Enables you to specify the list that should be used to populate the list of values for a dynamic drop-down field.
	Note: This property displays only when you select Dynamic Drop-Down as the field type.
Use this field value for the record title?	Enables you to specify that the value in this field be used as the title for the record (for example, in search results or dynamic drop-down lists).
	Note: Rich text fields cannot be used for the record title.
Display Order	Enables you to change the order in which the fields are displayed.

Creating a List

Before you create a list, think about what type of list you need to create, and, if you are creating a custom list, what fields the list should include. Consider which users and groups should be allowed to view, comment on, create, edit, and delete the list and all the objects associated with the list.

To create a list:

1. Create or navigate to the page on which you want to display the list. Add a record list or table component to the page. Enter a name for the component, then click **Configure List**.

2. On the Template page, select the type of list you want to create, and click **Configure List**.

3. On the General Settings page, type a name and description for the list and edit the default URL if desired. Then click **Next**.

4. If you are creating a custom list, on the Data Fields tab, add fields and define the field properties, then click **Next**.

5. Click **Finish**.

For more information on the List Editor and creating lists, see the online help.

Viewing a List

You can navigate to a list several different ways:

- In the Dashboard, expand the Space that includes the list, then click the list name.

- Click the list in the Organizer.

- Click a link to the list or enter the URL to the list in your browser's address bar.

- Navigate to a page that includes a record list or table that displays the list.

Editing a List

Use one of the following methods to edit a list:

- Navigate to the list, click **Edit This List**.

- From the Organizer, select the list and click **Info & Settings**.

Deleting a List

When you delete a list, it deletes all objects associated with the list, including all the records in the list, any pages that were created for any of the records, and any components and attachments added to those pages. There is no way to recover the list or any associated objects after deleting it.

Use one of the following methods to delete a list:

- Navigate to the list, click **Edit This List**, then, in the List Editor, click **Delete**.

- From the Organizer, select the list and click **Delete**.

Records

A record is a group of related fields that store data about a subject or activity (for example, a record can be one row in a table or one entry in a blog). A collection of records is stored in a list (which stores data in the native repository).

Note: Data stored in an external repository (for example, data from RSS feeds) is read-only; therefore you cannot add, edit, or delete records. Data stored in the native repository (for example, data from custom lists and blogs) is editable.

Creating a Record

Note: You can only add records to custom or blog lists and only if you have the proper permissions. For information on permissions, see "Space Roles" on page 7-2.

You add records different ways depending on the interface that displays the records:

- You create a new record in a Master/Detail table by clicking **Add New Record**, filling in the fields at the bottom of the table, and clicking **Create**.

- You create a new record in a Spreadsheet table by typing your data in the blank row at the bottom of the table, then moving your cursor out of the row to save the record.

- You create a new record in a Simple table by clicking **Add New Record**, filling in the fields in the form page, and clicking **Create**.

- You create a new record in a list by navigating to the list, clicking **Create a new record** (in a blog, click **Create New Post**), filling in the fields in the form page, and clicking **Create**.

- You create a new record in a record list by clicking **Add Record**, filling in the fields in the form page, and clicking **Create**.

Viewing Record Details

Record details are displayed in the table or record list, but, if there is additional content (for example, images, comments, or attachments) associated with a record, you can view those details in page view. To view the record in page view, navigate to the list, Simple table, or record list that includes the record, and click the record.

Note: Because you cannot open a record in page view from a Master/Detail table or a Spreadsheet table, you cannot view components, comments, or attachments associated with a record that you access from one of those tables.

Searching for Records

You can search for records using the search box at the top of any table or record list. As you type, the list is dynamically filtered to display only those records that include your search text in one of the record fields.

Sorting Records in a Table

You can sort the records in any table by clicking the name of the column by which you want to sort. The records will be sorted in ascending order. Click the column name again to sort the records in descending order.

Note: You cannot sort records in a record list.

Adding Components, Comments, or Attachments to a Record

You add components, comments, or attachments to a record by opening the record in page view and editing the record just like any other page.

Note: For information on editing pages, see "Editing a Page" on page 4-5.

Editing Record Data

Note: You can only edit records stored in the Pages repository (in custom or blog lists) and only if you have the proper permissions. For information on permissions, see "Space Roles" on page 7-2.

You edit records different ways depending on the interface that displays the records:

- You edit a record in a Master/Detail table by clicking the record, editing the data in the fields at the bottom of the table, and clicking **Save Record**.

- You edit a record in a Spreadsheet table by clicking the cell you want to edit, editing the data, then moving your cursor out of the row to save the record.

- You edit a record in a Simple table or a list by clicking the record (which opens the record in page view), editing the data in the form page, and clicking **Save Record**.

- You edit a record in a list or a record list by clicking **Edit Record** under the record you want to edit, editing the data in the form page, and clicking **Save Record**.

Deleting a Record

Note: You can only delete records to custom or blog lists and only if you have the proper permissions. For information on permissions, see "Space Roles" on page 7-2.

You delete records different ways depending on the interface that displays the records:

- You delete a record in a table by selecting the record and clicking **Delete Records**.

- You delete a record in a list or record list by clicking **Delete Record** under the record you want to delete.

Securing AquaLogic Pages

This chapter describes how to secure Pages functionality and objects through roles granted at the AquaLogic Pages application level and at the individual Space level.

AquaLogic Pages Roles

AquaLogic Pages roles control overall access to Pages:

Table 7-1 AquaLogic Pages Roles

Role	Description
Administrators	Allows members access to all areas in Pages and full control of all objects in Pages. Administrators are granted the Administrator Space role on all Spaces. To learn about Space roles, see "Space Roles" on page 7-2.
Space Creators	Allows members to create new Spaces. Space Creators see the **Create a Blank Space** link in the Dashboard.
Personal Space Creators	Allows members to create a personal blog Space. **Note:** You can enable/disable personal blogs through the Pages: Personal Blog section in the Configuration Manager.

For information on managing AquaLogic Pages Roles, see "Managing AquaLogic Pages Role Assignments" on page 7-3.

Space Roles

Space roles control access to individual Spaces and the objects associated with those Spaces. Pages Administrators are assigned the Administrator role for all Spaces by default. Your system administrator can change the default role assignments, but the default role assignments cannot be changed in the Space Editor. For information on changing the default role assignments, see "Changing the Default Role Assignments" on page 7-3.

Note: The following privileges are additive, meaning that the Reader role includes the privileges granted to the Guest role as well as additional privileges.

Table 7-2 Space Roles

Role	Privileges
Guest	• View the Space or list and all associated objects in the Dashboard, in the Organizer, and in page view
Reader	• Add comments to and reply to comments on the Space or list and all associated objects **Note:** Comments can be edited only by the user that wrote the comment or the Administrator. Comments can be deleted only by the user that wrote the comment, the user that created the object with which the comment is associated, or the Administrator.
Creator	• Create pages in the Space or records in the list • Delete comments associated with objects they create • Edit or delete any object they create • Edit or delete objects associated with objects they create For example, if a user creates a record and another user adds an image to the record, the user that created the record could edit or delete the image. **Note:** Editing includes: attaching, reverting, and deleting attachments; adding components; and reverting to a previous version of the page view.
Publisher	• Edit any object associated with the Space or list (not the Space or list itself) **Note:** Editing includes: attaching, reverting, and deleting attachments; adding components; and reverting to a previous version of the page view.

Table 7-2 Space Roles

Role	Privileges
Editor	• Delete any object associated with the Space or list (including previous versions of page views, but not the Space or list itself)
Administrator	• Full control of the Space or list and all associated objects • Edit or delete comments associated with the Space or list or comments associated with any associated objects • Edit or delete the Space or list **Note:** Editing includes: attaching, reverting, and deleting attachments; adding components; and reverting to a previous version of the page view.

Changing the Default Role Assignments

You can change the Spaces roles that are automatically granted access to new Spaces. To do so, add or remove users from *install_dir***\security-templates\live-spaces\default.xml** (for example, C:\bea\alui\pages\2.0\security-templates\live-spaces\default.xml).

Managing AquaLogic Pages Role Assignments

The Administration page in Pages enables you to manage the users and groups that can access AquaLogic Pages and the privileges that they have.

There are different tabs to manage the members in each AquaLogic Pages role:

● Administrators can access to all areas in Pages and full control of all objects in Pages. Administrators are granted the Administrator Space role on all Spaces.

● Space Creators can create new Spaces. Space Creators see the Create a Blank Space link in the Dashboard.

● Personal Space Creators can create a personal blog Space.

You add and remove users and groups on each tab to manage the members in each role.

For more information on the Administrator page and managing AquaLogic Pages role assignments, see the online help.

Attachments

This chapter describes how to incorporate existing file content into Pages and how to manage that content from within Pages.

Although you can add content to pages using rich text and page components, you might also want to add existing content (for example, Word documents or PowerPoint presentations). You can add this existing content by adding attachments to objects in page view. After adding an attachment, users can view the attachment or upload new versions of the attachment.

Adding an Attachment to a Page

To add an attachment to a page:

1. Navigate to the page.

2. Click **Add an Attachment**.

3. Click **Browse** to select the attachment. After selecting one attachment a new field appears, enabling you to select additional attachments.

4. When you are done selecting attachments, click **Upload**.

When you add an attachment to an object it appears on the left, on the **Attachments** tab, when you view the associated object in page view.

Viewing an Attachment

There are two ways to view an attachment:

- Open the Space with which the attachment is associated, and, on the Attachments tab, click the name of the attachment.

- Navigate to the Organizer and click the name of the attachment.

The attachment opens in page view. To view the attachment (or save it to your computer), click the attachment name.

Deleting an Attachment

To delete an attachment (and all its versions), navigate to the Organizer, select the attachment, and click **Delete**.

Uploading a New Version of an Attachment

There are two ways to upload a new version of an attachment:

- You can upload a new version of the attachment while viewing the attachment in page view. Click **Upload new version**, click **Browse** to select the new version, then click **Upload**.

  If the new version of the attachment has a different name than the existing version, the operative file name of the attachment changes to the new file name.

- You can also upload a new version of an attachment by selecting **Add an Attachment** in any page view, but the file names must match. If the file names do not match, Pages will treat the files as separate attachments.

Viewing a Previous Version of an Attachment

To view a previous version of an attachment, open the attachment in page view, then click the name of the attachment next to the version number you want to view.

Reverting to a Previous Version of an Attachment

To revert to a previous version of an attachment, open the attachment in page view, then click **Revert** next to the appropriate version. The version you revert to is saved as a new version, so you do not lose any version history. For example, if you revert from Version 10 to Version 6, Version 6 gets saved as Version 11. If you later discover that you should not have reverted the attachment, you can revert back to Version 10.

Deleting a Version of an Attachment

To delete a previous version of an attachment, open the attachment in page view, and click **Delete** next to the appropriate version. When you delete a version there will be a hole in your revision history. For example, if you delete Version 3, the list of versions will display: Version 5, Version 4, Version 2, and Version 1. This enables users to see that a given version, which may have had a specific purpose or meaning, was deleted.

Attachments

Optional Configuration Settings

This appendix describes some of the optional settings for Pages in the Configuration Manager.

To view the Pages settings in the Configuration Manager:

1. Navigate to https://*localhost*:*12345*/cm/ui/cm.jsf (replacing *localhost* with the name of the computer that hosts the Pages application, and replacing *12345* with the port number you specified during installation).

2. Log in as Administrator with the password you specified during installation.

3. Click **Pages**.

The following optional settings are available for Pages:

- Under **Cache Settings**:

  – **Number of seconds that content is cached for RSS** - The default is 3600 seconds (1 hour).

- Under **Experimental Features**:

  Experimental features are disabled by default.

  – **Enable Experimental Record Set Descriptor Templates** - Enable the experimental list templates for SOAP (Google search template) and REST (Yahoo search template) so that they appear in the list of templates when creating a new list.

– **Enable Experimental Component Definitions** - Enable this feature to display the experimental components on the Add Components tab page. The experimental components are Markup, which allows you to add HTML (this functionality is largely superceded by the source view in the rich text components), and Map.

– **Enable Experimental Component Settings** - This feature is disabled.

- Under **File Upload**:

    – **Maximum File Size, in MB** - This value limits the size of attachments added to Pages. The default is 10 MB.

- **Pages Crawler** section - These settings define the security used for the Pages content source.

- **Pages Proxy** section - These settings are proxy settings for RSS feeds.

- **Personal Blog** section - This setting enables or disables the personal blogs feature. Personal blogs are enabled by default.

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