

Content Portlet Suite (CPS) for Oracle Portal Server
10g Release 3 (10.1.3.3.1)

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Content Portlet Suite (CPS) for Oracle Portal Server, 10g Release 3 (10.1.3.3.1)
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INTRODUCTION

OVERVIEW

This chapter provides introductory information about this guide, a product overview, and a description of the conventions used in this guide. The information contained in this guide is subject to change as the product technology evolves and as hardware and operating systems are created and modified.

This section contains the following topics:

- ❖ [About This Guide](#) (page 1-1)
- ❖ [Product Overview](#) (page 1-2)
- ❖ [Conventions Used in This Guide](#) (page 1-4)

ABOUT THIS GUIDE

This guide documents the steps required to deploy and configure the Content Portlet Suite (CPS). The guide assumes the reader is familiar with the administration console of your portal server.

This guide is intended for application developers and integrators who wish to access the Content Server and/or Image Server via the Content Portlet Suite deployed on your portal server instance.

PRODUCT OVERVIEW

As organizations search for ways to improve their efficiency, access to corporate knowledge has become crucial. A key area is implementing a corporate portal to provide a secure, personalized way to aggregate data for consumption and processing.

The Content Portlet Suite provides access to the Content Server, enabling users to update, search, and view portal content in a way that is efficient and easy to use. CPS provides the ability to manage content creation and the distribution process through a set of easy-to-use portlets. These portlets can be enabled for different users based on their roles and permissions within the organization, and they can be easily customized for specific uses. Users can browse or search content based on their permissions, contribute new content (with the appropriate level of access), and view the progress of their content through workflow.

Content Portlet Suite: keeping portals up to date

Because of the ease of use of the Content Portlet Suite, a key issue is addressed with corporate portals—how to keep their content up to date. By driving content updates and additions through the portal interface, the process of updating the portal becomes part of using the portal, as opposed to a separate task performed outside of the portal.

Ease of use: contribution

With CPS, content contribution is simple. Users can contribute content by checking in a document. CPS takes care of normalizing the data with its ability to convert files through templates to your specified markup for viewing in the portal.

Ease of use: workflow

After checking in or updating content, users can track the content status through the portal. Users are notified right in the portal of their workflow status—to review, edit, and approve content—with links right to the content from the workflow item. They can click on the item, view it, and approve or edit it, and then send it on its way for further workflow or publishing. When content is approved, it is published and made available for viewing. Approved content can be published at a predetermined time as well, and expired at a predetermined time (e.g., in the case of a promotional offer or classified ad).

Ease of use: browsing

Content can be presented to users based on their role in the organization. The support team may log in to a portlet that shows new updates and fixes, with another portlet that shows current cases. These are automatically updated and appear to the users as titles with a link to the content; they may also have a short summary of the content.

Ease of use: searching

Content can be easily searched based on metadata categories or full text content, or both, through a provided CPS Portlet. For instance, users may search for a “support note” content type containing the word “policy,” which removes the need to search through all other occurrences of the word “policy” in other content types. CPS provides separate portlets for basic or authenticated search. CPS even provides a portlet that allows users to save searches that they use regularly.

Easy to administer

The Content Server and Content Portlet Suite are easy to administer. They can be set up and left to run indefinitely. Once you have decided your metadata model and workflow paths, CPS can be installed and users can begin contributing and viewing content.

Metadata Admin portlet

The Content Portlet Suite comes with a Metadata Admin portlet that allows you to modify properties of the Content Server metadata fields, which affects the behavior of the Contribution Portlet. With the Metadata Admin portlet, an administrator can define which metadata fields users, as well as the default metadata value for each field. Administrators can even hide metadata fields and specify what values should be set for those items.

High performance

Content Portlet Suite is built on top of the Content Integration Suite. This powerful integration layer offers speedy asynchronous access to content.

Easy to customize

The portlets in the Content Portlet Suite are written to be easily customized. If you want to create a new portlet to show content of a certain metadata value, copy the existing Browse portlet, tweak one simple parameter, and publish the portlet. Written in JSP, they are standards-based and easily customizable, even by business users. Customizing the portlets will help you make the most of your portal investment





By integrating Content Server and a portal server with the Content Portlet Suite, you provide an easier way to keep your portal up to date, increase efficiency, lower costs, and increase your return on your portal investment.

CONVENTIONS USED IN THIS GUIDE

This guide uses the forward-slash (/) to separate directories. Depending on your operating system, you may need to change the separation markers when defining directories. Other conventions are:

Convention	Definition
Bold	Indicates an item that you select in the interface, such as a button or menu, in order to perform a specific task, for example, “Click OK .”
>	Indicates a menu choice. For example, “ Choose File > Open ” means “Click the File menu, and then click Open .”
Code	Indicates the actual code used.

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

Symbols	Description
	This is a note. It is used to bring special attention to information.
	This is a technical tip. It is used to identify information that can be used to make your tasks easier.
	This is an important notice. It is used to identify a required step or required information.
	This is a caution. It is used to identify information that might cause loss of data or serious system problems.

GENERAL INFORMATION

OVERVIEW

This chapter provides general information on the Content Portlet Suite (CPS) including an overview of the portlets, the high-level sequence of events for portlet request-handling, and notes on internationalization (cross-locale implementations).

This section covers the following topics:

- ❖ [Portlet Descriptions](#) (page 2-2)
- ❖ [Request-Handling](#) (page 2-3)
- ❖ [Internationalization](#) (page 2-5)

See also:

- CPS Portlet Developer Guide for information on the portlet framework and the portlet software development kit ([cps-developer-guide.pdf](#)).
- CIS Installation Guide for information on the CIS framework ([cis-installation-guide.pdf](#) in the /docs directory of the CIS distribution file).
- CIS Developer Guide for information on command invocation, execution, and extending commands ([cis-developer-guide.pdf](#) in the /docs directory of the CIS distribution file).

PORTLET DESCRIPTIONS

The CPS Portlets use the Universal Content and Process Management API (UCPM API) within the CIS distribution to communicate back to the Content Server and/or Image Server. The Portlet API facade abstracts the common operations within portlet containers so our framework will work on a variety of platforms (Oracle, WebSphere, WebLogic, Plumtree, Oracle, and Sun ONE) using the same handler code. Portlet Actions are mapped to a custom MVC framework that uses the UCPM API to perform the desired task.

The Content Portlet Suite implements the following set of portlets that interact with Content Server and/or Image Server:

Content Server

- ❖ **Oracle Guest Library portlet:** Content can be presented to users based on their role in the organization.
- ❖ **Oracle Guest Search portlet:** Allows the user to perform a keyword or full-text search on the Content Server and permits read-only access to the returned content
- ❖ **Oracle Saved Search portlet:** Allows the user to save frequently used queries.
- ❖ **Oracle Contribution portlet:** Allows the user to contribute content to the Content Server.
- ❖ **Oracle Workflow Queue portlet:** The workflow portlet notifies users of their workflow tasks.
- ❖ **Oracle Library portlet:** Presents content to users based on their role in the organization, and provides read/write access to the returned content.
- ❖ **Oracle Search portlet:** Allows the user to perform a selected metadata and keyword search on the Content Server and provides read/write access to the returned content.
- ❖ **Oracle Metadata Admin portlet:** Allows the administrator to modify the properties of custom metadata.

Image Server

- ❖ **Oracle Image Server Search Portlet:** This search portlet queries the Image Server. Allows the user to perform a search on the Image Server and permits read-only access to the returned content.

Content Server & Image Server

- ❖ **Oracle Federated Search Portlet:** This search portlet queries both the Content Server and the Image Server repositories. This portlet provides an integration between an Image Server and a Content Server or multiple Content Servers, etc.

Each of these portlets requires that the Content Integration Suite (CIS) is installed and available. The Content Integration Suite provides a Java API into the Content Server and/or Image Server and is capable of running inside a J2EE application server environment (e.g., Oracle, WebSphere or WebLogic) or a servlet container environment (e.g., Tomcat).

The portlets are consumers of standard Content Server services (IdcCommand services), such as CHECKIN_UNIVERSAL and GET_SEARCH_RESULTS. However, these services are not called directly by the dispatch handlers from the portlet controller. Rather, the UCPM API abstracts the portlets from the details of talking to the server. The UCPM API allows for rigid parameter validation, dynamic command selection, and standardized integration with a J2EE environment.

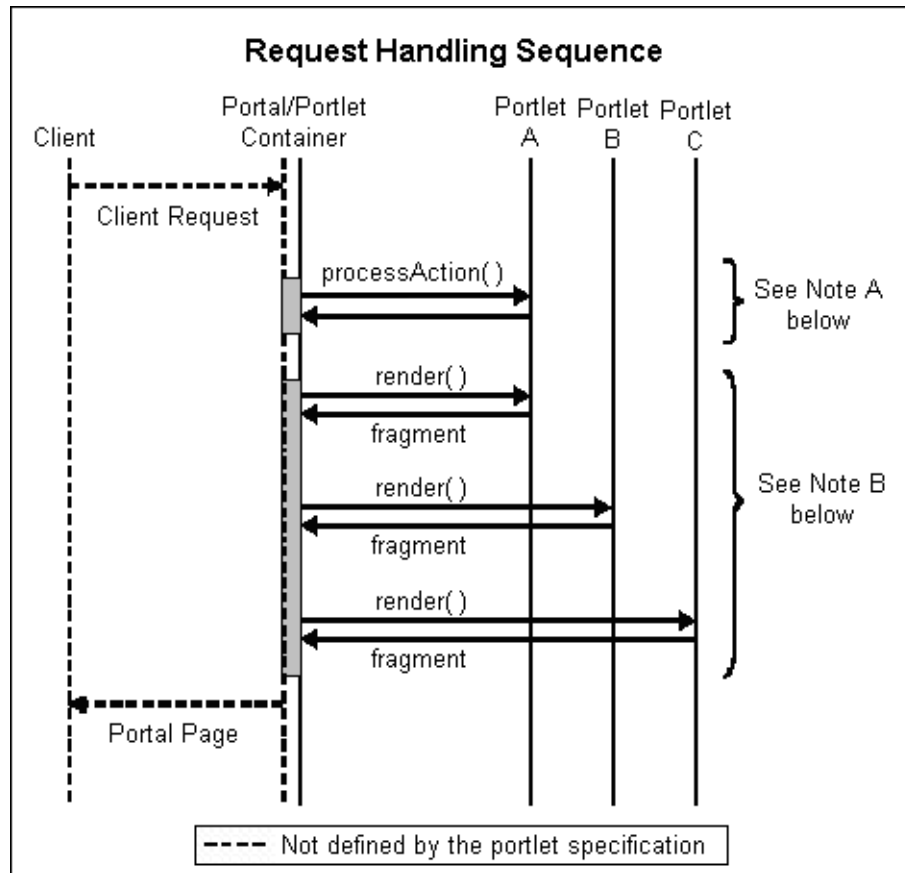


Note: See the CIS Developer Guide for more information (cis-developer-guide.pdf in the /docs directory of the CIS distribution file).

REQUEST-HANDLING

This is the high-level sequence of events for portlet request-handling (based on the Search portlet):

1. A user enters a query and clicks the Search button.
2. An 'action' URL is built and routed to the portlet container, which, in turn, routes the command to the appropriate portlet (in this case, the search portlet).
3. A processAction' is called on the Search portlet.
4. The Search portlet retrieves the search parameters (they are part of the URL that was built), and calls the 'search' method on the Content Integration Suite API.
5. The Content Integration Suite queries the Content Server via the Resource Pool (a pool of socket connections), retrieves the data, and passes the data object to the Search portlet.
6. The portlet container calls *render* on each of the portlets on the page (including the Search portlet), and each portlet uses the received data, or refreshes the data, and displays HTML fragments to the user.



Note A: The *action* request must finish before the *render* requests begin.

Note B: The *render* requests are not triggered in any specific order. They may be executed sequentially or simultaneously.

Portlet API Facade

Not every portal vendor supports the standard completely or in exactly the same way, so each action handler has access to a facade object that provides an interface that protects the user of the facade from code incompatibilities between various portal vendors.



Note: See the CPS Portlet Developer Guide for a presentation of the portlet dispatch framework and information on using the Portlet SDK ([cps-developer-guide.pdf](#)).

INTERNATIONALIZATION

The portlets will only support the locale of the Java Virtual Machine that is running the portal server. There is currently no support for managing cross-locale implementations on the same portal server.

General Information

INSTALLING THE CONTENT PORTLET SUITE

OVERVIEW

This chapter provides information required for the installation of the Content Portlet Suite for Oracle Application Server Portal. Content Portlet Suite (CPS) is supported in Oracle Application Server Portal and WebCenter as remote services using Web Services for Remote Portlets (WSRP). Both CIS Server and the CPS portlets need to be deployed to WebCenter Preconfigured OC4J which serves as the *provider*. Oracle Application Server Portal serves as the *consumer* and needs to register the provider to access the portlets. The portlets are delivered to users through the portal server which communicates with the portlet provider using WSRP.



Important: Content Portlet Suite (CPS) requires that Content Integration Suite (CIS) be installed and available. When deploying CIS Server and CIS Administration Application to your provider you must Configure Class Loading by de-selecting the *Import* option for the *apache.commons.logging* library. This is done on the Deployment Settings step. You must de-select the *Import* option for the *apache.commons.logging* library for both the CIS Server and CIS Administration Application deployment. See the CIS Installation Guide for more information.

This section covers the following topics:

- ❖ [Installation Requirements](#) (page 3-2)
- ❖ [Preliminary Setup](#) (page 3-2)
- ❖ [Installation Steps](#) (page 3-3)

- ❖ [Recommended Access Settings](#) (page 3-5)

INSTALLATION REQUIREMENTS

Oracle Application and Portal Servers

A supported version of Oracle Application Server as *provider* and Oracle Application Server Portal as *consumer* is required:

- ❖ WebCenter Preconfigured OC4J
(OC4J 10.1.3.1.1 Preconfigured for Oracle WebCenter 10.1.3.2.0)
- ❖ Consumer: Oracle Application Server Portal 10.1.4 with patch p4640471. Oracle Portal 10.1.4 is an upgrade from 10.1.2.

Content Server and Image Server

A supported version of Content Server or Image Server (or both) is required:

- ❖ Content Server 7.5.2 or later
- ❖ Image Server 7.5 or later

JVM

A supported JVM is required:

- ❖ J2SE 1.4 or later

PRELIMINARY SETUP

The following must be completed before installing Content Portlet Suite:

- ❖ Configure the Content Server for Verity search.
- ❖ Unbundle the CPS distribution file and save it to a location on your local server.
- ❖ Start Oracle OC4J Provider (Enterprise Manager / Application Server Control).
- ❖ Start Oracle Application Server Portal.



Important: User IDs on the Content Server must correspond with user IDs on the portal server.

INSTALLATION STEPS

You must have met the installation requirements and completed the preliminary setup described above before installing and configuring Content Portlet Suite (CPS). Also, CPS requires that Content Integration Suite (CIS) be installed and available. See [Overview](#) (page 3-1) and the CIS Installation Guide for more information.

This section covers the following topics:

- ❖ [Deploying CPS for Oracle](#) (page 3-3)
- ❖ [Configuring the Portal](#) (page 3-3)

Deploying CPS for Oracle

1. Launch the Oracle Application Server Control.
2. Select the **Applications** tab.
3. Click **Deploy**.
4. Browse to the `/portlets` directory of the unbundled CPS distribution file and select the Portlets EAR file.
5. Enable the **Automatically create a new deployment plan** option.
6. Click **Next**.
7. Provide an application name (e.g., CPS Portlets) and context root (e.g., `/cps`).
8. Click **Next**.
9. For the *Configure Class Loading* task, click the Go To Task icon.
10. De-select the **Import** option for the *apache.commons.logging* library.
11. Click **OK**.
12. Click **Deploy**.

Configuring the Portal

Launch the Oracle Application Server Portal — Portal Builder. To configure your portal you must register a Provider, create an Instant Portal, and adding the CPS portlets to the Portal.

Registering a Provider

1. Select the **Administer** tab.
2. Select the **Portlets** tab.
3. In the section *Remote Providers*, click **Register a Provider**.
4. Enter a Name (e.g., CPS_Provider).
5. From the Implementation Style drop-down list select **WSRP**.
6. Click **Next**.
7. Enter WSDL URL.

Example: <http://testserver7:8888/cps/portlets/wsrp1?WSDL>



Tech Tip: Access the WSRP Producer Page (e.g., <http://testserver7:8888/cps/info>), select the WSDL URL link (e.g., WSRP v1 WSDL) to generate a WSDL definition XML file, and copy the URL from the browser window. This is the WSDL URL to enter in this field.


8. Click **Next**. If this provider requires registration properties that must be provided during registration, enter the appropriate values.
9. Click **Finish**.
10. Click **OK**.

Creating an Instant Portal

These steps are only required for the initial deployment:

1. Select the **Build** tab.
2. In the section *Oracle Instant Portal*, enter a name (e.g., CPS_Portal).
3. Click **Create**.

Adding the CPS Portlets

1. On the created Oracle Instant Portal (e.g., CPS_Portal), switch to Edit mode.
2. Select a region to add the CPS portlets and click the Add Portlet icon ().
3. In the section *Portlet Repository*, click **Portlet Staging Area**.
4. Select the provider you registered (e.g., CPS_Provider).
5. Select the CPS portlets you want to add to this region of you Portal.

6. Click **OK**.
7. Select **View Page** to display the portlets.

RECOMMENDED ACCESS SETTINGS

By default, portlet security is set to allow access by only the system administrator. You must also configure security to allow other users to access the portlets and assign permissions based on the access requirements you establish for users. However, some security settings are recommend for authenticated users and for anonymous users:

Authenticated Users

These security settings are recommend for authenticated users. The Metadata Admin portlet is an administration portlet and should be restricted to admin-level users.

- ❖ Guest Library: **edit**
- ❖ Guest Search: **edit**
- ❖ Saved Search: **edit**
- ❖ Contribution: **edit**
- ❖ Workflow Queue: **view**
- ❖ Library: **edit**
- ❖ Search: **edit**
- ❖ Metadata Admin: **view**
- ❖ Image Server Search Portlet: **edit**
- ❖ Federated Search Portlet: **edit**

Anonymous Users

These security settings are recommend for anonymous users:

- ❖ Guest Library Portlet: **view**
- ❖ Guest Search Portlet: **view**
- ❖ Image Server Search Portlet: **view**
- ❖ Federated Search Portlet: **view**

CPS PORTLET FUNCTIONALITY

OVERVIEW

This chapter provides information on the CPS portlets, including a short tutorial on using the CPS portlets, instructions on how to customize the Library and Guest Library portlets, and instructions on defining the Federated Search portlet mapping.

This section covers the following topics:

- ❖ [Using the CPS Portlets](#) (page 4-1)
- ❖ [Customizing the Portlets](#) (page 4-15)
- ❖ [Defining the Federated Search Portlet Mapping](#) (page 4-17)



Important: It is assumed that all of the installation steps have been performed and that all of the CPS Portlets are accessible to the home page.

USING THE CPS PORTLETS

This section provides a brief tutorial of each of the CPS Portlets:

- ❖ [Guest Library Portlet](#) (page 4-2)
- ❖ [Guest Search Portlet](#) (page 4-3)
- ❖ [Saved Search Portlet](#) (page 4-4)
- ❖ [Contribution Portlet](#) (page 4-5)
- ❖ [Workflow Queue Portlet](#) (page 4-7)

- ❖ [Library Portlet](#) (page 4-8)
- ❖ [Search Portlet](#) (page 4-9)
- ❖ [Metadata Admin Portlet](#) (page 4-10)
- ❖ [Image Server Search Portlet](#) (page 4-11)
- ❖ [Federated Search Portlet](#) (page 4-13)



Note: The portlet images in this section are examples only. The actual look (icons, colors, etc.) may be different on your portal server instance.

Guest Library Portlet

The Guest Library portlet enables portal users to view content that matches criteria pre-defined by the portlet administrator. The results of the pre-defined search are delivered to the user in a list format. By selecting a hyperlink item in the list, the user can view the content. The user can also view the content item information page. The content displayed to the user is defined by the portal administrator.

Oracle Guest Library Personalize

- ◆ [Admin's Thoughts](#)
Notes and tips from the system administrator
- ◆ [What's New](#)
Content from the past 30 days
- ◆ [Accounting Forms](#)
All accounting policies and related info

Using the Guest Library Portlet

1. Click **Personalize**.

Personalization allows users to modify the displayed results from a search.

- ❖ **Results Per Page:** Enter the number of results to display per page. Default is 20.
- ❖ **Sort By:** Select the field to sort by. Options are *Date* or *Title*.
- ❖ **Sort Order:** Select the sort order. Options are *Ascending* or *Descending*.

2. Click **Save** when edits are complete.
3. Select a search query (e.g., What's New).

The results are displayed in a list format.

4. Click **Back**.

Guest Search Portlet

The Guest Search portlet enables portal users to search the Content Server for business content. Users can search by subject and/or keyword. The results of the search are delivered to the user in a list format. By selecting a hyperlink item in the list, the user can view the content. This portlet also enables users to save queries for display in the Saved Search portlet.

Oracle Guest Search Personalize

Subject

Keywords

Using the Guest Search Portlet

1. Click **Personalize**.

Personalization allows users to modify the displayed results from a search.

- ❖ **Results Per Page:** Enter the number of results to display per page. Default is 20.
- ❖ **Sort By:** Select the field to sort by. Options are *Date* or *Title*.
- ❖ **Sort Order:** Select the sort order. Options are *Ascending* or *Descending*.

2. Click **Save** when edits are complete.
3. Enter a subject or keyword and click **Search**.



Note: There must be content checked into your Content Server that contains the specified subject or keyword for items to be retrieved.

4. On the search results screen, click **Save**.

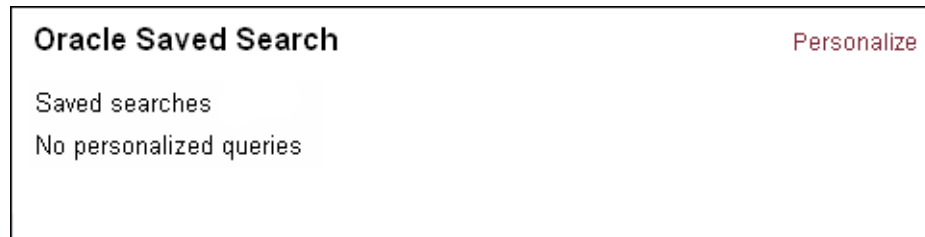
The save search query screen is displayed. This functionality saves a search to the saved searches list of the Saved Search portlet.

The keyword used to perform the search is displayed in the *Keywords* field. To save a search, enter a title for the query, the content item title and click **Add New Query**.

5. Click **Back** to return to the search results page.

Saved Search Portlet

The Saved Search portlet enables portal users to view previously saved searches. Saved searches are delivered to the user in a list format. By selecting a hyperlink item in the list, the user can view the content of the saved search. Saved searches can be saved to the list by performing a search using the Search portlet and saving that search or by directly defining search parameters on the Saved Search portlet.



Using the Saved Search Portlet

Searches can be saved to the *Saved Searches* list by performing a search using the Search portlet and saving that search, or by directly defining search parameters on the Saved Search portlet.

1. Click **Personalize**.

The search criteria page is displayed. On this page you can edit your standard search parameters, view or delete items from your saved search list, and create a new query.

2. In the section *Standard Search Parameters*, users can modify the displayed results from a search.
 - ❖ **Results Per Page:** Enter the number of results to display per page. Default is 20.
 - ❖ **Sort By:** Select the field to sort by. Options are *Date* or *Title*.
 - ❖ **Sort Order:** Select the sort order. Options are *Ascending* or *Descending*.
3. In the section *Create New Query*, enter the information for the new query:
 - ❖ Query Title (e.g., Sales Images).
 - ❖ Query Description (e.g., Sales Department Images).
 - ❖ Query Text (e.g., dDocTitle <substring> `salesimage`).

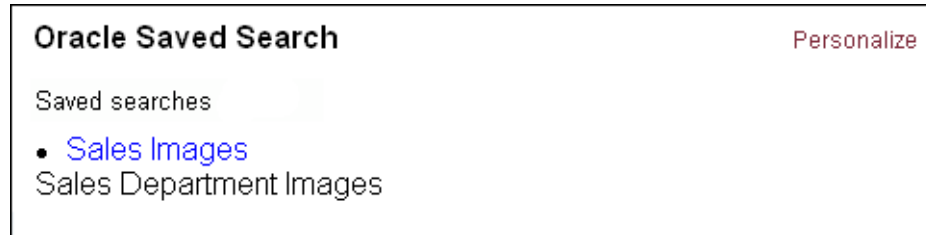


Note: Rather than entering a query string, you can perform a standard search using the Search portlet, click **Save**, and then click **Add New Query**.

4. Click **Add New Query**.

5. Click **Close**.

The saved query is displayed.



6. Click a saved search title.

The saved search results are displayed in a list format.

7. Click **Back**.

Contribution Portlet

The Contribution portlet enables portal users to submit native business content for management and publishing purposes. The content submission can trigger automatic indexing, workflow routing, subscription services, and security. When the required add-on modules are used with the Content Server, content categorization and publishing in multiple formats (HTML, XML, WML, cHTML, and PDF) can be performed.

Oracle Contribution Personalize

Content Check In Form

The Content Check In Form page is used by contributors to check files into the Content Server. Please note that some fields are optional.

Content ID

Type ▼

Title

Author

Security Group ▼

Primary File

Alternate File

Revision

Comments

Using the Contribution Portlet

1. On the Contribution portlet, enter required metadata and any desired optional metadata. The Contribution portlet enables users to submit business content created in native applications for publishing and revision control.



Note: Metadata fields are defined by the Content Server administrator.

2. In the Primary File field, enter the complete path to the business content or click **Browse** to select the content for check in.
3. Click **Check In** to submit the content.

Workflow Queue Portlet

The Workflow Queue portlet enables portal users to quickly access content that is waiting for their review. This portlet provides users direct access to their workflow in-boxes for the review and approval of business content. A workflow must be defined for this portlet to provide functionality. The portlet lists the content item title, workflow step information, the last action performed, and the actions allowed, and provides a link to content item information.

Oracle Workflow Queue				
Title	Workflow Info	Last Action	Actions	Info

A workflow must be defined for this portlet to provide functionality. See the Content Server online Help for instructions on defining a workflow.

This example assumes a criteria workflow with these properties:

- ❖ Name: WorkflowTest
- ❖ Security Group: Public
- ❖ Has Criteria Definition: ENABLED
- ❖ Field: Type
- ❖ Operator: Matches
- ❖ Value: ADSALES

And it assumes a workflow step with these properties:

- ❖ Name: StepOne
- ❖ Type: Reviewer
- ❖ User: User1

Using the Workflow Queue Portlet

1. Locate the Workflow Queue portlet.
2. After creating a workflow, log in as a workflow reviewer (e.g. user1) and check in a content item matching the specified criteria.
3. Review the workflow item.

The Workflow Queue portlet provides this functionality:

- ❖ **Title:** Lists the content item. Click to download file.
- ❖ **Workflow Info:** Lists the active step. Click to view workflow step information.
- ❖ **Last Action:** Lists the last action the user performed on the workflow.
- ❖ **Action:** Users defined as Reviewers can *Approve* or *Reject* content. Users defined as Reviewer/Contributor can *Approve*, *Reject*, or *Contribute* content.
- ❖ **Info:** Provides content item information.

Oracle Workflow Queue				
Title	Workflow Info	Last Action	Actions	Info
WorkflowTest	StepOne		Approve / Reject	

4. Click **Workflow Info** to view the workflow step information
5. Click **Back**.
6. Click **Approve** or **Reject**.

Library Portlet

The Library portlet enables portal users to perform a selected metadata and keyword search on the Content Server, and provides read/write access to the returned content.

Oracle Library	Personalize
<ul style="list-style-type: none"> ◆ Admin's Thoughts Notes and tips from the system administrator ◆ What's New Content from the past 30 days ◆ Accounting Forms All accounting policies and related info 	

Using the Library Portlet

1. Click **Personalize**.

Personalization allows users to modify the displayed results from a search.

- ❖ **Results Per Page:** Enter the number of results to display per page. Default is 20.
- ❖ **Sort By:** Select the field to sort by. Options are *Date* or *Title*.

- ❖ **Sort Order:** Select the sort order. Options are *Ascending* or *Descending*.
2. Click **Save** when edits are complete.
 3. Select a search query (e.g., What's New).
The search results are displayed.
 4. Click the **Info** icon.
 5. On the Content Info page, these options can be selected from the drop-down list:
 - ❖ Content Information
 - ❖ Check Out
 - ❖ Check in Similar
 - ❖ Send Link by Email
 6. Click **Back**.

Search Portlet

The Search portlet enables portal users to perform a selected metadata and keyword search on the Content Server and provides read/write access to the returned content.

Oracle Search Personalize

Search Criteria

This page enables you to perform a metadata, full-text, or combination search.

Title

Content ID

Author

Text

Using the Search Portlet

1. Enter a search query (for example, Sample or Test).

The search query is returned.

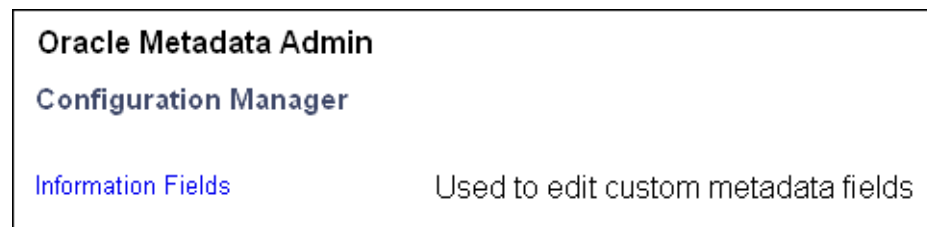


Note: Metadata fields are defined by the Content Server administrator.

2. Click the **Info** icon.
3. On the Content Info page, these options can be selected from the drop-down list:
 - ❖ Content Information
 - ❖ Check Out
 - ❖ Check in Similar
 - ❖ Send Link by Email
4. Click **Back**.

Metadata Admin Portlet

The Metadata Admin portlet enables the administrator to modify the properties of custom metadata.



Using the Metadata Admin Portlet

1. Click **Information Fields**.

The Information Fields list is displayed.



Note: Information Fields are defined by the Content Server administrator.

Oracle Metadata Admin					
Information Fields					
Property	Type	Required	Display	Default	Searchable
Comments	Memo	false	true		true
apxFolder	Int	false	true		true
apxHidden	Text	false	true	FALSE	true
apxReadOnly	Text	false	true	FALSE	true
apxInhibitMetadataUpdate	Text	false	true	FALSE	true
apxTrashDeleter	Text	false	true		false
apxTrashDeleteOldName	Memo	false	true		false
apxTrashDeleteDate	Date	false	true		false
apxTrashDeleteLocation	Int	false	true		false
Template Type	Text	false	true		false

[Back](#)

2. Select an Information Field (e.g., Comments).

The Edit Field page is displayed.

3. Make changes as desired and click **Apply** or **Cancel**.

Image Server Search Portlet

The Image Server Search portlet queries the Image Server database and returns matching results. This allows users to perform a search on the Image Server and permits read-only access to the returned content.



Note: An Image Server instance must be installed and configured (for example, the IP address of the application server must be enabled on the Image Server). See the CIS Installation Guide for more information.

This portlet enables portal users to search the Image Server for business content. Users can search by pre-defined criteria. The results of the search are delivered to the user in a list format.

Using the Image Server Search Portlet

1. Click **Personalize**.

Personalization allows users to modify the displayed results from a search:

- ❖ **Results per page:** Enter the number of results to display per page.
- ❖ **Thumbnail Size:** Enter the HEIGHT and WIDTH in pixels.
- ❖ **Cache Results:** Enable the check-box if you want images to be cached.

2. Click **Submit** to change your settings or **Reset** to return to the default settings.
3. On the search form, select a choice from the drop-down list.



Note: The search form shows the list of predefined queries. This predefined criteria is defined in the Image Server. See the Image Server documentation for more information.

4. Click **Submit**.

A list of options associated with your selected choice from the drop-down list is displayed.

5. Enter a query and click **Submit**.

The search results page is displayed.



Note: There must be content checked into your Image Server that matches the query for items to be retrieved.

6. Click **Back**.
7. Click the **Info** icon.

The information page is displayed. This page displays the content data and thumbnail of a specific document.

8. Click **Back**.

Federated Search Portlet

The Federated Search portlet queries both the Image Server and the Content Server databases (or multiple Content Servers, etc.). This portlet provides an integration between an Image Server and a Content Server or multiple Content Servers.



Note: Each Image Server or Content Server instance must be running and properly configured (for example, the IP address of the application server must be enabled on the Image Server). See the CIS Installation Guide for more information.

This portlet enables portal users to search both the Content Server and the Image Server for business content. Users can search by subject and/or keyword. The results of the search are delivered to the user in a list format.

Oracle Federated Search Personalize

Common Search Fields

Date	<input type="text"/>
Author	<input type="text"/>
Title	<input type="text"/>
ID	<input type="text"/>

Using the Federated Search Portlet

1. Click **Personalize**.
1. The configured adapters and search options are provided.

Adapters / Type: This allows the user to select the Content Servers and/or Image Servers to query:

- ❖ **Active Adapter:** Each Content Server instance is listed as an “active” adapter.
- ❖ **Fixed Adapter:** Each Image Server instance is listed as an “fixed” adapter.

Search Options: This allows the user to edit parameters that modify the displayed results from a search:

- ❖ **Sort By:** Select the sort criteria from the drop-down list. For example, Title, Author, Date, etc.

- ❖ **Results per adapter:** The number of results returned from each enabled adapter.
- ❖ **Results per page:** The number of results returned on each page. If more results are returned than the number defined, those results will be displayed on additional pages.



Note: The “Sort By” options are configured by the administrator in the Common Metadata Map. See the CIS Developer Guide for more information (cis-developer-guide.pdf in the /docs directory of the unbundled CIS distribution file).

Adapters	Type
<input checked="" type="checkbox"/> myadapter	Active Adapter
<input checked="" type="checkbox"/> sisadapter	Fixed Adapter
Search Options	
Sort By	Date <input type="button" value="v"/>
Results Per Adapter	<input type="text" value="100"/>
Results Per Page	<input type="text" value="20"/>
<input type="button" value="Submit"/>	

2. Enable the desired adapters for this query.



Important: Each selected adapter must reference a Content Server or Image Server instance that is both running and properly configured. If any instance is not running or is not properly configured the search query will fail for all instances.

3. Modify the Search Options as desired.

4. Click **Submit**.

The search page is displayed. This page shows a list of common metadata fields defined between adapters.

5. Enter a search query. For example, a search query by author.

6. Click **Submit**.



Note: There must be content checked into your selected Content Servers and/or Image Servers that matches the specified query for items to be retrieved.

The search results page is displayed. This page shows the result list, the columns are defined by the common metadata fields.

7. Click the **Info** icon.

The content information page is displayed. This page displays metadata and provides access to content streams of a specific piece of content.

8. Click **Ok**.

CUSTOMIZING THE PORTLETS

This section provides information on customizing the portlets including customizing the Library and Guest Library portlets that display queries pre-defined by the administrator.



Note: These procedures are performed by an administrator and are not user configurable.

Administrators can define the business content displayed to users in portlets by editing the *portlet.xml* file. A query string defines the parameters to search on, and any metadata field can be used to define the search query.

1. Unbundle the CPS distribution file or locate the deployed portlet EAR file on your Portal Server instance.
2. Unbundle the WAR file (e.g., cps-oracle-war-<version>.war).
3. In the WEB-INF directory, open the portlet.xml file in a text-only editor.
4. Locate the <portlet> entries for the Library and Guest Library portlets.

```
<portlet>
  <description>Oracle Library Portlet</description>
  <portlet-name>stellentLibrary</portlet-name>
```

```
<portlet>
  <description>Oracle Guest Library Portlet</description>
  <portlet-name>stellentGuestLibrary</portlet-name>
```

5. For either the Library or the Guest Library portlet, locate the <preference> entries that provide the query definitions. To customize the portlet, you must edit the <value> entries.

```
<preference>
  <name>query1.title</name>
  <value>What&apos;s New</value>
</preference>
<preference>
  <name>query1.description</name>
```

```

        <value>Content from the past 30 days</value>
    </preference>
</preference>
    <name>query1.query</name>
    <value>dInDate &gt; `&lt;$dateCurrent(-30)$&gt;`</value>
</preference>

```

6. Edit the *title* and *description* entries: *title* is the search title displayed to the user; *description* is the short search description displayed to the user.

For example: “Important Notices” and “Important messages from the president.”

```

<name>query3.title</name>
<value>Important Notices</value>

<name>query3.description</name>
<value>Important messages from the company president.</value>

```

7. Edit the *query* entry defined by a query string using standard XML notation. To code a query string, use a pre-defined metadata parameter, a query string modifier, and an appropriate metadata value.

For example, define a query string that returns content items checked in by author *president* (dDocAuthor matches *president*):

```

<name>query3.query</name>
<value>dDocAuthor &lt;matches&gt; &apos;president&apos;</value>

```

Any predefined metadata parameter can be used to create commands, for example:

- ❖ **dInDate:** The content item release date (i.e., the date the content item was released to the web).
- ❖ **dDocAuthor:** The content item author (e.g., *user1* or *sysadmin*).
- ❖ **dDocType:** The content item type (e.g., *ADACCT* or *FILES*).



Note: You must use the metadata parameter, not the field title (e.g., *dDocAuthor* not *Author*)..

These query string modifiers can be used:

- contains
- matches
- starts
- ends
- substring

8. When your edits are complete, save the portlets.xml file.
9. Rebundle the WAR file.
10. Deploy the updated version of the edited portlet.



Note: See the CPS Portlets Developer Guide for a presentation of the portlet dispatch framework and information on using the Portlet SDK ([cps-developer-guide.pdf](#)).

DEFINING THE FEDERATED SEARCH PORTLET MAPPING

The Federated Search portlet queries both the Image Server and the Content Server databases (or multiple Content Servers, etc.). This portlet provides an integration between an Image Server and a Content Server or multiple Content Servers.



Note: Each Content Server and/or Image Server instance must be configured (for example, the IP address of the application server must be enabled on the Image Server). See the CIS Installation Guide for more information.

This portlet enables your portal users to search both the Content Server and the Image Server for business content. Users can search by subject and/or keyword. The results of the search are delivered to the user in a list format.

The common metadata map defines the Federated Search portlet mapping. This XML file is located in the /WEB-INF/config directory and is called *ucpmcommon-metamap.xml*.

1. Unbundle the CPS distribution file or locate the deployed portlet EAR file on your Portal Server instance.
2. Unbundle the WAR file (e.g., *cps-oracle-war-<version>.war*).
3. In the /WEB-INF/config directory, open the *ucpmcommon-metamap.xml* file in a text-only editor.

This example illustrates a common metadata map:

```
<!--
Default metadata map for the different adapter types. These values will be used
if a metadata map is not specified. The name attribute corresponds to the adapter
type (i.e. " scsadapter " is a Content Server Adapter and " sisadapter " is an
Image Server adapter)
-->
<metamap>
  <adapter name="scsadapter">
    <common>
```

```

    <map name="Title" native="dDocTitle" />
    <map name="Author" native="dDocAuthor" />
    <map name="Date" native="dInDate" />
    <map name="ID" native="dID" />
  </common>
  <contribution>
    <!-- native fields are used only for contribution -->
    <native name="comments" default="" override="true" />
    <!-- common fields refer back to common map, can also be tagged
         with default and override attributes -->
    <common name="title" />
    <common name="author" />
  </contribution>
</adapter>
<adapter name="sisadapter">
  <common>
    <map name="Title" native="DocType" objectClass="SImageHRAppIndex" />
    <map name="Author" native="EmployeeName" objectClass="SImageHRAppIndex" />
    <map name="Date" native="DocDate" objectClass="SImageHRAppIndex" />
    <map name="ID" native="SSN" objectClass="SImageHRAppIndex" />
  </common>
</adapter>
</metamap>

```

This metadata map defines both a Content Server (e.g., *scsadapter* or *myadapter*) and an Image Server (e.g., *sisadapter*). The `<metamap>` node can contain any number of `<adapter>` nodes.

The `<adapter>` node takes a name attribute, this name should correspond to the adapter configured in the `adapterconfig.xml` for the repository you want to define. Each `<adapter>` node can tag in two sub nodes, `<common>` and `<contribution>`. The `<common>` node indicates that you are going to create some metadata field mappings. To create one, you need only to create a sub node `<map>` and provide a common name attribute *name* and a *native* attribute.

The common name should be defined on each configured adapter which you expect to make common calls on. The native name is the name of the metadata field as known by the specific repository. For example, the common name *title* is mapped to *dDocTitle* on a Content Server instance. To change default entries (e.g., *scsadapter* and *sisadapter*) simply edit the XML file. For example, this defines *contentserver7* as the new adapter name.

```
<adapter name="contentserver7">
```

An Image Server repository allows different metadata models to be present in the same repository and separates them by Application type. The *objectClass* attribute to the `<map>`

node corresponds to this Application type. For example, the same common name *title* is mapped to the native DocType of the application *SImageHRAppIndex* in the Image Server repository defined by the adapter name *sisadapter*.

To add or edit the adapter entry for the Image Server simply edit the <adapter> node and the objectClass attribute of the <map> node.

For example, this defines *imageserver7* and the *SImageDevIndex* objectClass:

```
<adapter name="imageserver7">
  <common>
    <map name="Title" native="DocType" objectClass="SImageDevIndex" />
    <map name="Author" native="EmployeeName" objectClass="SImageDevIndex" />
    <map name="Date" native="DocDate" objectClass="SImageDevIndex" />
    <map name="ID" native="SSN" objectClass="SImageDevIndex" />
  </common>
</adapter>
```



Note: See “Common metadata maps” in the CIS Developer Guide for more information (cis-developer-guide.pdf in the /docs directory of the CIS distribution file).



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* zlib.h -- interface of the 'zlib' general purpose compression library
version 1.2.3, July 18th, 2005

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