Preface

Oracle's PeopleSoft Applications Portal Preface ........................................................................... ix
About PeopleSoft Applications Portal .......................................................................................... ix
   PeopleSoft Portal Solutions Product Family ................................................................................ ix
   PeopleSoft Applications Portal and PeopleTools Portal Technology ........................................... x
Using this PeopleBook .................................................................................................................. x
   About this Book ......................................................................................................................... xi
   Common Elements Used in PeopleSoft Applications Portal ...................................................... xi
Related PeopleBooks .................................................................................................................... xii
   PeopleSoft Applications Portal PeopleBooks .............................................................................. xii
   PeopleTools PeopleBooks ............................................................................................................ xiii
PeopleBooks and the PeopleSoft Online Library ........................................................................... xiii

Chapter 1

Understanding Collaborative Workspaces ..................................................................................... 1
Collaborative Workspaces ............................................................................................................. 1
The Workspace Homepage ............................................................................................................. 2
The Workspace Menu .................................................................................................................... 3
Workspace Modules ...................................................................................................................... 4

Chapter 2

Setting Up Collaborative Workspace Options and Templates ..................................................... 9
Understanding Workspace Setup .................................................................................................. 9
Setting Up System Options for Workspaces .................................................................................. 9
   Page Used to Set Up System Options for Workspaces ................................................................. 10
   Setting System Options for Workspaces .................................................................................... 10
Setting Up the Workspace Category Hierarchy ........................................................................... 13
   Understanding the Workspace Category Hierarchy ................................................................. 13
   Pages Used to Set Up the Workspace Category Hierarchy ......................................................... 13
   Managing the Workspace Category Hierarchy .......................................................................... 14
   Adding and Editing Workspace Categories ............................................................................. 15
   Moving Categories ..................................................................................................................... 16
Setting Up Workspace Instant Messaging .................................................................................. 17
# Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Setting Up Workspace Templates</td>
<td>17</td>
</tr>
<tr>
<td>Understanding Workspace Templates</td>
<td>17</td>
</tr>
<tr>
<td>Pages Used to Set Up Workspace Templates</td>
<td>18</td>
</tr>
<tr>
<td>Managing Workspace Templates</td>
<td>20</td>
</tr>
<tr>
<td>Creating Workspace Templates</td>
<td>22</td>
</tr>
<tr>
<td>Setting Workspace Template Properties</td>
<td>23</td>
</tr>
<tr>
<td>Selecting Template Members</td>
<td>26</td>
</tr>
<tr>
<td>Selecting Template Modules</td>
<td>28</td>
</tr>
<tr>
<td>Defining Document Module Options for a Template</td>
<td>30</td>
</tr>
<tr>
<td>Adding or Editing Related Pagelets in a Template</td>
<td>32</td>
</tr>
<tr>
<td>Defining Contextual Data for Templates</td>
<td>35</td>
</tr>
<tr>
<td>Copying Changes from Templates</td>
<td>38</td>
</tr>
<tr>
<td>Defining Template Security</td>
<td>40</td>
</tr>
<tr>
<td>Configuring Advanced Options for Templates</td>
<td>41</td>
</tr>
<tr>
<td>Importing and Exporting Template Data</td>
<td>42</td>
</tr>
</tbody>
</table>

## Chapter 3

**Creating Collaborative Workspaces** ........................................................................ 43

Understanding Workspace Creation ........................................................................ 43

Creating Root-Level Workspaces ........................................................................ 45

Pages Used to Create Root-Level Workspaces ...................................................... 46

Step 1: Selecting a Workspace Template ............................................................... 47

Step 2: Relating a Workspace to a Transaction ...................................................... 48

Step 3: Naming and Describing a Workspace .......................................................... 49

Step 4: Selecting Workspace Modules .................................................................. 50

Step 5: Adding Workspace Members ...................................................................... 52

Creating Child Workspaces .................................................................................... 55

Page Used to Create Child Workspaces ................................................................ 55

Creating a Child Workspace .................................................................................. 55

Creating and Updating Workspaces in Batch Mode .............................................. 56

Pages Used to Create and Update Workspaces in Batch Mode .............................. 57

Running the Process to Create and Update Workspaces in Batch Mode ............... 57

## Chapter 4

**Administering Collaborative Workspaces** ............................................................ 65

Understanding Workspace Administration ............................................................ 65

Understanding Workspace Privilege Sets ............................................................. 66

Setting Up a Workspace ......................................................................................... 71

Pages Used to Define Details of Workspaces ....................................................... 71

Administering Workspace Properties ..................................................................... 73
Chapter 5

Working in Collaborative Workspaces ................................................................. 99

Accessing Workspaces ...................................................................................... 99
  Understanding How to Access Workspaces ...................................................... 100
  Pages Used to Access Workspaces ................................................................. 100
  Working with the My Workspaces Pagelet ......................................................... 101
  Searching for Workspaces .............................................................................. 103
  Browsing the Workspace Hierarchy ................................................................. 104
  Browsing Workspaces by Category ................................................................. 106
  Requesting Access to a Workspace ................................................................. 107
Navigating in a Workspace ................................................................................ 109
Modifying Your Workspace Homepage ............................................................ 114
Using the Wiki Content Module ....................................................................... 114
  Understanding the Wiki Content Module ....................................................... 115
  Pages Used with the Wiki Content Module ..................................................... 116
  Editing the Content ......................................................................................... 116
  Viewing the Content ....................................................................................... 123
  Reviewing Content Information ..................................................................... 124
  Working With the Wiki Content Pagelet .......................................................... 126
Using the Discussions Module ......................................................................... 127
  Understanding the Discussions Module ......................................................... 127
  Using the Recent Discussions Pagelet ............................................................. 128
Using the Documents Module ......................................................................... 130
  Understanding the Documents Module ......................................................... 130
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working With the Recent Documents Pagelet</td>
<td>130</td>
</tr>
<tr>
<td>Using the Blogs Module</td>
<td>131</td>
</tr>
<tr>
<td>Understanding the Blogs Module</td>
<td>131</td>
</tr>
<tr>
<td>Working With the Blogs Pagelet</td>
<td>131</td>
</tr>
<tr>
<td>Using the Links Module</td>
<td>132</td>
</tr>
<tr>
<td>Understanding the Links Module</td>
<td>133</td>
</tr>
<tr>
<td>Pages Used in the Links Module</td>
<td>133</td>
</tr>
<tr>
<td>Maintaining Links and Folders</td>
<td>134</td>
</tr>
<tr>
<td>Adding a Link</td>
<td>135</td>
</tr>
<tr>
<td>Adding a Folder</td>
<td>140</td>
</tr>
<tr>
<td>Accessing Folder Contents</td>
<td>141</td>
</tr>
<tr>
<td>Working With the Links Pagelet</td>
<td>142</td>
</tr>
<tr>
<td>Using the Action Item Lists Module</td>
<td>142</td>
</tr>
<tr>
<td>Understanding the Action Item Lists Module</td>
<td>143</td>
</tr>
<tr>
<td>Working With the Open Action Items Pagelet</td>
<td>143</td>
</tr>
<tr>
<td>Using the Calendar Module</td>
<td>143</td>
</tr>
<tr>
<td>Understanding the Calendar Module</td>
<td>144</td>
</tr>
<tr>
<td>Working With the Calendar Pagelet</td>
<td>144</td>
</tr>
<tr>
<td>Working with the Upcoming Events Pagelet</td>
<td>145</td>
</tr>
<tr>
<td>Using the Members Module</td>
<td>146</td>
</tr>
<tr>
<td>Understanding the Members Module</td>
<td>146</td>
</tr>
<tr>
<td>Pages Used in the Members Module</td>
<td>147</td>
</tr>
<tr>
<td>Viewing the List of Members</td>
<td>147</td>
</tr>
<tr>
<td>Viewing Member Profiles</td>
<td>149</td>
</tr>
<tr>
<td>Notifying Workspace Members</td>
<td>150</td>
</tr>
<tr>
<td>Using the Related Data Module</td>
<td>151</td>
</tr>
<tr>
<td>Using the Related Discussions Pagelet</td>
<td>152</td>
</tr>
<tr>
<td>Using the Polls Module</td>
<td>152</td>
</tr>
<tr>
<td>Understanding the Polls Module</td>
<td>152</td>
</tr>
<tr>
<td>Using the Poll Pagelet</td>
<td>153</td>
</tr>
<tr>
<td>Using the Browse Workspaces Module</td>
<td>154</td>
</tr>
<tr>
<td>Searching Within Workspaces</td>
<td>154</td>
</tr>
<tr>
<td>Understanding Searching Within Workspaces</td>
<td>154</td>
</tr>
<tr>
<td>Pages Used to Search Within a Workspace</td>
<td>156</td>
</tr>
<tr>
<td>Searching from the Workspace Header</td>
<td>156</td>
</tr>
<tr>
<td>Searching Within Selected Workspace Modules</td>
<td>157</td>
</tr>
<tr>
<td>Viewing and Subscribing to Feeds Within a Workspace</td>
<td>158</td>
</tr>
<tr>
<td>Understanding Workspace Feeds</td>
<td>158</td>
</tr>
<tr>
<td>Pages Used to View and Subscribe to Feeds Within a Workspace</td>
<td>160</td>
</tr>
<tr>
<td>Creating and Using Tags in Workspaces</td>
<td>160</td>
</tr>
<tr>
<td>Understanding Tags in Workspaces</td>
<td>160</td>
</tr>
<tr>
<td>Using the Tags Pagelet</td>
<td>160</td>
</tr>
<tr>
<td>Working with Additional Workspace Pagelets</td>
<td>163</td>
</tr>
<tr>
<td>Working with the Email Pagelet</td>
<td>163</td>
</tr>
<tr>
<td>Working with the Feed Reader Pagelet</td>
<td>163</td>
</tr>
</tbody>
</table>
Index ........................................................................................................................................ 165
Oracle's PeopleSoft Applications Portal

Preface

This preface discusses:

• About PeopleSoft Applications Portal.
• Using this PeopleBook.
• Related PeopleBooks.
• PeopleBooks and the PeopleSoft Online Library.

About PeopleSoft Applications Portal

This section discusses:

• PeopleSoft Portal Solutions product family.
• PeopleSoft Applications Portal and PeopleTools.

PeopleSoft Portal Solutions Product Family

These products are part of the PeopleSoft Portal Solutions product family:

• PeopleSoft Applications Portal.
• PeopleSoft Enterprise Internal Controls Enforcer.

PeopleSoft Applications Portal

Oracle's PeopleSoft Applications Portal is a world-class portal solution with many robust content and collaborative features. The PeopleSoft Applications Portal is ideal for customers wanting to deploy an unlimited number of communities across Applications that focus on PeopleSoft application business processes.

PeopleSoft Applications Portal 9.1 contains a rich set of Web 2.0 features. For instance, you can key collaborative workspaces and related content services to PeopleSoft application transactions, providing contextually relevant collaboration.

Two key characteristics distinguish PeopleSoft Applications Portal as a rich Web 2.0 platform:

• PeopleSoft Applications Portal is a traditional portal framework that you can use to aggregate and manage content from multiple applications and sources. With unified navigation, it is now simple to configure PeopleSoft Applications Portal to federate multiple PeopleSoft application systems.
• Its collaborative capabilities make PeopleSoft Applications Portal a functional application that complements the features found in PeopleSoft applications.

**PeopleSoft Enterprise Internal Controls Enforcer**

Oracle's PeopleSoft Enterprise Internal Controls Enforcer is designed to automate and enforce internal controls required under Section 404 of the Sarbanes-Oxley Act. Using the monitoring and diagnostic capabilities of the product, you can reduce the cost of complying with the new regulations and the risk of unforeseen changes in internal controls. PeopleSoft Enterprise Internal Controls Enforcer will work in conjunction with other PeopleSoft corporate governance solutions to make the entire compliance process repeatable and auditable, allowing you to focus on running your business.

In addition, the product enables you to continuously track and monitor controls and, optionally, to certify their effectiveness at interim times throughout the year to support certifications that are required for Section 302 of Sarbanes-Oxley.

See *PeopleSoft 9.1 PeopleBook: Internal Controls Enforcer*

**PeopleSoft Applications Portal and PeopleTools Portal Technology**

To understand the functionality of PeopleSoft Applications Portal, you should familiarize yourself with PeopleTools, focusing especially on the PeopleBooks and chapters that are devoted to portal functionality. Because PeopleSoft Applications Portal builds upon the basic internet architecture that is delivered with PeopleTools, this information gives you an excellent foundation of knowledge upon which the PeopleSoft Applications Portal suite of PeopleBooks builds.

PeopleTools portal technology is built on top of PeopleSoft Pure Internet Architecture and enables you to easily access and administer multiple content providers, including PeopleSoft databases such as Oracle's PeopleSoft Applications HRMS or Oracle's PeopleSoft CRM, as well as non-PeopleSoft content. It enables you to combine content from these multiple sources and deliver the result to users in a unified, simple-to-use interface.

The main elements of the PeopleTools portal technology are a portal servlet and an application server. These two elements work together to provide common portal processing features, such as page assembly, search ability, content management, navigation, and homepage personalization.

PeopleTools PeopleBooks cover the PeopleSoft Pure Internet Architecture and PeopleTools portal technology in detail.

See *PeopleTools 8.52: PeopleTools Portal Technologies PeopleBook*

---

**Using this PeopleBook**

This section discusses:

• About this book.

• Common elements used in PeopleSoft Applications Portal.
About this Book

This PeopleBook comprises the following chapters:

- **Chapter 1: Introducing Collaborative Workspaces**
  This chapter provides an introduction to collaborative workspaces and the workspace homepage.
  See Chapter 1, "Understanding Collaborative Workspaces," page 1.

- **Chapter 2: Setting Up Collaborative Workspace Options and Templates**
  This chapter describes system options to enable workspace features and documents how to create and maintain workspace templates.

- **Chapter 3: Creating Collaborative Workspaces**
  This chapter describes how to create collaborative workspaces.
  See Chapter 3, "Creating Collaborative Workspaces," page 43.

- **Chapter 4: Administering Collaborative Workspaces**
  This chapter describes how to administer workspaces and workspace modules.
  See Chapter 4, "Administering Collaborative Workspaces," page 65.

- **Chapter 5: Working in Collaborative Workspaces**
  This chapter describes how to use each workspace module and the pagelets on the workspace homepage.

Common Elements Used in PeopleSoft Applications Portal

This section discusses the rich text editor.

**About the Rich Text Editor**

Many PeopleSoft Applications Portal features—including blogs, discussion forums, text/HTML content, wiki content, and others—employ the rich text editor.

The rich text editor provides editing and formatting capabilities for long edit boxes. It allows for the rich formatting of text content, including structural elements such as HTML tags and lists, formatting treatments such as bold and italic text, and drag-and-drop inclusion and sizing of images, among other features. Moreover, the rich text editor toolbar is extensible by using a custom settings configuration file.

Related PeopleBooks

This section discusses:

- PeopleSoft Applications Portal PeopleBooks.
- PeopleTools PeopleBooks.

PeopleSoft Applications Portal PeopleBooks

The PeopleSoft Applications Portal PeopleBook library includes the PeopleBooks listed here:

- *PeopleSoft Applications Portal 9.1 PeopleBook: Branding*

  This PeopleBook covers the branding feature, which enables you to apply various branding themes to the portal, portal sites, and collaborative workspaces to present multiple visual designs and deliver appropriate links for specific user audiences.

  See *Portal Solutions 9.1 PeopleBook: Branding*

- *PeopleSoft Applications Portal 9.1 PeopleBook: Collaborative Workspaces*

  This is the PeopleBook you are reading. It covers setup, administration, and use of collaborative workspaces, which are virtual team rooms that facilitate collaboration on a variety of collaborative projects and processes.

  See *PeopleSoft Applications Portal 9.1 PeopleBook: Collaborative Workspaces*

- *PeopleSoft Applications Portal 9.1 PeopleBook: Content Management System*

  This PeopleBook describes the content management system, which includes features to help you manage, create, and organize content. The resulting content is ready and available for placement in various portal pagelets and news publications; reuse in workspaces, calendars, and other portal features; or available just for browsing.

  See *PeopleSoft Applications Portal 9.1 PeopleBook: Content Management System*

- *PeopleSoft Applications Portal 9.1 PeopleBook: Portal and Site Administration*

  This PeopleBook covers tasks for administering portals and sites including product configuration, systemwide setup and administration, integration with third-party systems, and so on.

  See *PeopleSoft Applications Portal 9.1 PeopleBook: Portal and Site Administration*

- *PeopleSoft Applications Portal 9.1 PeopleBook: Resource Finder*

  This PeopleBook describes how to set up and use Resource Finder, a highly flexible repository that describes any organizational resource, along with links that relate these resources to each other.

  See *PeopleSoft Applications Portal 9.1 PeopleBook: Resource Finder*
PeopleBooks and the PeopleSoft Online Library
A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.
Chapter 1

Understanding Collaborative Workspaces

This chapter discusses:

• Collaborative workspaces.
• The workspace homepage.
• The workspace menu.
• Workspace modules.

Collaborative Workspaces

In Oracle's PeopleSoft Applications Portal, a collaborative workspace is a virtual team room. You can create a workspace to facilitate the completion of any project that requires a team to work collaboratively to accomplish its goals, even if team members are in different locations.

Some collaborative projects focus on temporary issues that require short, intense collaborative sessions, such as closing a sales deal or an open problem incident. Other projects may be ongoing, such as coordinating the work for a department.

You can create workspaces to manage many different collaboration scenarios. Some examples include:

• Supplier relationships for which you manage the ongoing relationship with a supplier using contextual links to one or more transactions related to that supplier.

• Customer relationships for which you manage an ongoing relationship with a customer using contextual links to one or more transactions related to that customer.

• Period closing processes for which you manage the process to close an accounting period such as end of month, end of quarter, or end of fiscal year.

• Sales opportunities for which you manage a specific sales opportunity—from identifying a prospect through closing a deal.

• Proposal development for which you manage the process of developing and delivering a proposal.

• Problem resolution for which you manage a specific problem incident.

• Department management for which you manage information and processes for a particular department.
The Workspace Homepage

The workspace administrator can configure the workspace homepage to display pagelets relevant to the content of the workspace, including pagelets associated with each workspace module. The workspace homepage displays the modules selected for the workspace in the menu on the left and the pagelets selected for the workspace homepage in selected columns, as shown in this example:
Example of a workspace homepage

The Workspace Menu

The workspace menu displays the modules selected for use in that workspace in the Menu pagelet, as shown in this example:
Example of the workspace menu

**Workspace Modules**

The workspace administrator configures which modules are active in a workspace by selecting check boxes on the module administration page, as shown in this example:
Example of module administration

These modules are available in a workspace:

- Welcome module.
  
  When the Welcome module is selected for a workspace, then the Welcome pagelet displays the welcome text on the workspace home page.


- Wiki Content module.

  Use the Wiki Content module to author wiki content for the workspace collaboratively. The Wiki Content module provides features such as version control and multi-language support that allow continuous and collaborative refinement of the content. You use the rich text editor to edit the wiki content, which appears in the Wiki Content pagelet.

• Discussions module.

Use the Discussions module to participate in discussions relevant to the workspace. The Discussions module enables workspace members to post discussion topics and replies, and it provides the complete history of interaction about a topic. Members can also monitor recent discussion postings using the Recent Discussions pagelet that appears in the workspace homepage.


• Documents module.

Use the Documents module to publish, optionally approve, and view shared documents relevant to a workspace. Members can monitor recent document postings using the Recent Documents pagelet that appears in the workspace homepage.


• Blogs module.

Use the Blogs module to participate in the blog for the workspace. The Blogs module enables workspace members to create news and multi-threaded commentary on topics relevant to the workspace. Members can also monitor recent blog postings using the Blogs pagelet that appears in the workspace homepage.


• Links module.

Use the Links module to create a collection of links relevant to the workspace. This collection appears in the Links pagelet that appears in the workspace homepage.


• Action Item Lists module.

Use the Action Item Lists module to maintain action item lists and action items that define responsibilities for individual workspace members. Members can also monitor current action items using the Open Action Items pagelet that appears in the workspace homepage.


• Calendar module.

Use the Calendar module to maintain the workspace calendar and events and to coordinate activities of the workspace team. Members can also monitor current events using the Upcoming Events and Calendar pagelets that appear in the workspace homepage. The Calendar pagelet can simultaneously display events from the workspaces, action items from the workspace, and a user's personal tasks.


• Members module.

Use the Members module to get information about and to communicate with workspace members. The Members module provides access to member profiles as well as links to initiate email and instant messaging with members. The Members module is required in all workspaces.

• Related Data module.

Use the Related Data module to access a collection of pagelets relevant to a workspace. The workspace administrator compiles this collection of pagelets.


• Polls module.

Use the Polls module to create questions for the workspace poll. Members can respond to the poll and monitor poll results using the Poll pagelet that appears in the workspace homepage.


• Browse Workspaces module.

Use the Browse Workspaces module to browse the workspace hierarchy or to search for other workspaces. You can create new workspaces or child workspaces in this module.


• Administration module.

The workspace administrator can use the Administration module to define workspace properties, manage workspace membership and security, select workspace modules, define contextual data relationships, and further customize the workspace. The Administration module is required in all workspaces.

Chapter 2

Setting Up Collaborative Workspace Options and Templates

This chapter provides an overview of workspace setup and discusses how to:

• Set up system options for workspaces.
• Set up the workspace category hierarchy.
• Set up workspace instant messaging.
• Set up workspace templates.
• Import and export template data.

Understanding Workspace Setup

To use collaborative workspaces in Oracle's PeopleSoft Applications Portal, you must complete these setup steps:

1. Set up system options.
2. Create a workspace category hierarchy.
3. Set up instant messaging for workspaces.
4. Create workspace templates.

Setting Up System Options for Workspaces

This section discusses how to set system options for workspaces.
Page Used to Set Up System Options for Workspaces

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Installation Options</td>
<td>EO_PE_OPTIONS1</td>
<td>Portal Administration, System Data, Installation Options</td>
<td>Define portal installation options, including options that are specific to the collaborative workspace feature.</td>
</tr>
</tbody>
</table>

Setting System Options for Workspaces

Access the Installation Options page (Portal Administration, System Data, Installation Options).
This section discusses the options in the Resource Finder and Collaborative Workspaces group boxes that are used to define installation options for workspaces.

Other options on the Installation Options page are covered in the *PeopleSoft Applications Portal 9.1 PeopleBook: Portal and Site Administration*.

**Resource Finder**

**Enable Resource Finder**  
Select this check box to use the Resource Finder feature.

**Use Resource Finder for Profile Pages**  
Select to use Resource Finder participant profiles as the source for workspace member profiles accessible from the Members module. When a user clicks a member name link in the Members module, the member profile that appears will be based on the member’s Resource Finder participant profile.

For this option to work as designed, you must have the following setup in place:

- Resource Finder must be set up and loaded with data. This setup includes the generation of associated Resource Finder search collections.
- Resource Finder participants must be loaded with their associated user IDs where applicable.


If you do not select this option, when a user clicks a member name link in the Members module, the member profile that appears is based on information from the PSOPRDEFN, PSUSEREMAIL, EPPCW_MEMBERS, and PS_EPPRC_IM_USERVW tables.


**Collaborative Workspaces**

**Maximum Email Notifications**  
Enter the maximum number of email messages you want to be able to send in the member invitation notification process for a workspace.

If the number of email messages sent in the notification process exceeds this number, the system displays an error message and does not send any email messages.

**Default Module Image**  
Select the name of the image you want to appear by default in the workspace menu to the left of a module name. If an image is defined for a module, then the system overrides this default image.

**Default Presence Indicators in Members Module**  
Select to display instant messaging presence indicators in the Members module. If you decide to display presence indicators, keep in mind that one server trip is executed per indicator per member.

**Enable External Users**

Select to enable the option to create external user accounts for workspaces. See Chapter 4, "Administering Collaborative Workspaces," Administering Workspace Members, page 75.

---

**Setting Up the Workspace Category Hierarchy**

This section provides an overview of the workspace category hierarchy and discusses how to:

- Manage the workspace category hierarchy.
- Add and edit workspace categories.
- Move categories.

**Understanding the Workspace Category Hierarchy**

Use the workspace category hierarchy to organize workspaces. When you create workspace templates and workspaces, you can assign them a category you have defined using the Manage Categories component.

When you use the Manage Workspaces and Manage Templates components, you can choose to search for, browse, and sort existing workspace templates and workspaces by category.

**Pages Used to Set Up the Workspace Category Hierarchy**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collaborative Workspace Category Hierarchy</td>
<td>EPPCW_MAINTCAG</td>
<td>Portal Administration, Workspaces, Manage Categories</td>
<td>Manage the hierarchy of categories used to organize workspace templates and workspaces.</td>
</tr>
<tr>
<td>Add Category</td>
<td>EPPCW_AE_CATEGORY</td>
<td>Click the Add Category button on the Collaborative Workspace Category Hierarchy page.</td>
<td>Add a category to the workspace category hierarchy.</td>
</tr>
<tr>
<td>Edit Category</td>
<td>EPPCW_AE_CATEGORY</td>
<td>Click the Edit Category button on the Collaborative Workspace Category Hierarchy page.</td>
<td>Edit a category in the workspace category hierarchy.</td>
</tr>
<tr>
<td>Select Category</td>
<td>EPPCW_PARCATG_SEL</td>
<td>Click the Move Category button on the Edit Category page.</td>
<td>Use the Select Category page to move the current category in the category hierarchy.</td>
</tr>
</tbody>
</table>
Managing the Workspace Category Hierarchy

Access the Collaborative Workspace Category Hierarchy page (Portal Administration, Workspaces, Manage Categories).

**Collaborative Workspace Category Hierarchy**

Manage the hierarchy of categories within which the collaborative workspaces are organized.

**Top Category**

Use the Top Category group box to enter information about the top category, which is the root of the workspace category hierarchy. This single top category will house all categories for your workspace implementation.
**Category Name**
Enter the name you want to use to identify the top category of your workspace category hierarchy. The category you define here is the top folder in the graphical representation of the category hierarchy that appears in the lower portion of the page.

**Description**
Enter a description of the top category. This field is for internal reference.

![Expand/Hide Child Categories](image)
Indicates a category that contains other categories. Click to display or hide child categories.

![Empty Category](image)
Indicates a category that does not contain any other categories.

Click the linked category name text to access any of the following editing options applicable to the selected category:

**Add Category**
Click to access the Add Category page, where you can add a category to the selected category.

**Edit Category**
Click to access the Edit Category page, where you can edit the selected category.

**Delete Category**
Click to access the Delete Confirmation page, where you can confirm or cancel the deletion of a selected category.

**Note.** You cannot delete the top category, but you can rename it.

### Adding and Editing Workspace Categories

Access the Add Category page (select a category and click the Add Category link on the Collaborative Workspace Category Hierarchy page).

Access the Edit Category page (select a category and click the Edit Category link on the Collaborative Workspace Category Hierarchy page).

**Edit Category**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category</td>
<td>Product development</td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>Parent Category</td>
<td>Categories</td>
</tr>
</tbody>
</table>

Edit Category page
Use the Add Category page to add a new category to the workspace category hierarchy.

Use the Edit Category page (shown) to edit or move a category.

**Category**
Enter the name of the category.

**Description**
Enter a description for the category.

**OK**
Click to save your changes.

**Cancel**
Click to cancel any changes.

**Move Category**
Click to access the Select Category page to move this category to a new location in the hierarchy.

### Moving Categories

Access the Select Category page (click the Move Category button on the Edit Category page).

#### Select Category

Select the category for the collaborative workspace from the following category hierarchy.

<table>
<thead>
<tr>
<th>Left</th>
<th>Right</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Categories" /></td>
<td>Departments</td>
</tr>
<tr>
<td><img src="image" alt="Categories" /></td>
<td>Finance</td>
</tr>
<tr>
<td><img src="image" alt="Categories" /></td>
<td>HR</td>
</tr>
<tr>
<td><img src="image" alt="Categories" /></td>
<td>Marketing</td>
</tr>
</tbody>
</table>

Select Category page

To use the Select Category page to move a category:

1. Browse the category hierarchy to view the available categories:
   - Click + to expand a category folder and reveal its contents.
   - Click − to collapse a category folder and hide its contents.

2. Click a link for a category to select that category as the new parent category.
Setting Up Workspace Instant Messaging

Instant messaging functionality is available in workspaces by way of member profiles accessible from the Members module. To display instant messaging presence indicators in the Members module, select the Default Presence Indicators in Members Module option on the Installation Options page.


See Also

PeopleSoft Applications Portal 9.1 PeopleBook: Portal and Site Administration, "Setting Up Instant Messaging in PeopleSoft Applications Portal"

Chapter 5, "Working in Collaborative Workspaces," Viewing Member Profiles, page 149

Setting Up Workspace Templates

This section provides an overview of workspace templates and discusses how to:

• Manage workspace templates.
• Create workspace templates.
• Set workspace template properties.
• Select template members.
• Select template modules.
• Define document module options for a template.
• Add or edit related pagelets in a template.
• Define contextual data for templates.
• Copying changes from templates.
• Define template security.
• Configure advanced options for templates.

Understanding Workspace Templates

When creating a workspace, you must select a workspace template on which to base the workspace. A workspace template is a model that provides common characteristics for the workspaces built from it. For example, a workspace template can define default workspace modules, the default layout of the workspace homepage, default workspace members and privileges, and the contextual relationships, if applicable.
Three workspace templates are delivered with PeopleSoft Applications Portal:

- **Base workspace template**

  The base workspace template provides a basic module configuration in a three-column homepage layout. The other delivered templates are based on this template.

- **Base workspace template wiki**

  This template is a variation of the base workspace template. It includes the Wiki Content module instead of the Welcome module and a two-column homepage layout to accommodate wiki content.

- **Demo workspace template**

  This template is a variation of the base template. It demonstrates a contextual data relationship between a transaction page (Demo Department Definition page) and an associated workspace.

  **Note.** This template exists in the Demo database only.

A workspace template is a portal registry derived from the delivered workspace base portal template. Using the template administration pages documented in this section, you can define various aspects of this template registry, including security, contextual data, associated workspace modules, and related pagelets.

You can create additional workspace templates to suit your organization's needs. You can create highly or minimally configured templates, depending on their usage. For example, you can create separate templates to meet the needs of project groups, departments, business units, or transaction-based collaborators.

### Pages Used to Set Up Workspace Templates

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Templates</td>
<td>EPPCW_MANAGE</td>
<td>Portal Administration, Workspaces, Manage Templates</td>
<td>Browse and manage a list of workspace templates.</td>
</tr>
<tr>
<td>Create Workspace Template</td>
<td>EPPCW_TMPL_CREATE</td>
<td>Portal Administration, Workspaces, Create Template</td>
<td>Create a workspace template definition.</td>
</tr>
<tr>
<td>Template Created page</td>
<td>EPPCW_TMPL_COMPL</td>
<td>Click the Save button on the Create Workspace Template page.</td>
<td>Access a new template by clicking the template name link.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Administration - Properties</td>
<td>EPPCW_ADMIN_PROP</td>
<td>• In a workspace template, click the Administration link. &lt;br&gt;• Click the template name link on the Template Created page. &lt;br&gt;Click the Administration link in the workspace menu. &lt;br&gt;• Portal Administration, Workspaces, Manage Templates &lt;br&gt;Click the template you want to administer. &lt;br&gt;Click the Administration link in the workspace menu.</td>
<td>Set workspace template properties such as name, category, and branding theme.</td>
</tr>
<tr>
<td>Select Branding Theme and Overrides</td>
<td>EPPSM_THM_ASSIGN</td>
<td>Click the Select Overridable Elements link on the Administration - Properties page.</td>
<td>Determine which branding elements can be overridden by workspace administrators.</td>
</tr>
<tr>
<td>Administration - Members</td>
<td>EPPCW_ADMIN_MBR</td>
<td>In a workspace template, click the Administration link. Select the Members tab.</td>
<td>Manage the membership settings of a workspace template.</td>
</tr>
<tr>
<td>Administration - Modules</td>
<td>EPPCW_ADMIN_MOD</td>
<td>In a workspace template, click the Administration link. Select the Modules tab.</td>
<td>Select the modules and pagelets that you want to include in a workspace template.</td>
</tr>
<tr>
<td>Documents Module Properties</td>
<td>EPPCW_DC_CATGOPTS</td>
<td>In a workspace template, click the Administration link. Select the Modules tab.</td>
<td>Define options available in the Documents module of workspaces created using the template.</td>
</tr>
<tr>
<td>Add Pagelet</td>
<td>EPPPB_CP_ADD</td>
<td>Click the Add Related Pagelet button on the Administration - Modules page.</td>
<td>Select a pagelet definition from a source portal and add it to a template.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------------------------------</td>
<td>----------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Edit Pagelet</td>
<td>EPPPB_CP_EDIT</td>
<td>Click the Edit Pagelet button for a related pagelet on the Administration - Modules page.</td>
<td>Edit the definition for a related pagelet.</td>
</tr>
<tr>
<td>Key Name Mapping</td>
<td>EPPCW_ADMIN_KEYMAP</td>
<td>Click the Map link for a related pagelet on the Administration - Modules page.</td>
<td>Select and optionally rename the keys passed to the pagelet.</td>
</tr>
<tr>
<td>Administration - Contextual Data</td>
<td>EPPCW_ADMIN_KEYS</td>
<td>In a workspace template, click the Administration link.</td>
<td>Manage contextual data associated with a template. For example, you can enter data that ties the template to one or more transactions and to one or more transaction key fields.</td>
</tr>
<tr>
<td>Select Transaction</td>
<td>EPPCW_BROWSEREGR</td>
<td>Click the Select Transaction button on the Administration - Contextual Data page.</td>
<td>Select a transaction that you want to include as contextual data for a template.</td>
</tr>
<tr>
<td>Administration - Copy Changes</td>
<td>EPPCW_ADMIN_COPY</td>
<td>In a workspace template, click the Administration link.</td>
<td>Copy selected items updated in the template to specified target workspaces, templates, or both.</td>
</tr>
<tr>
<td>Module Details, Related Pagelets, Link Details</td>
<td>EPPCWADM_COPY_DET</td>
<td>On the Administration - Copy Changes page, click a Details link.</td>
<td>Select which modules, pagelets, or links will be copied to the target workspaces.</td>
</tr>
<tr>
<td>Administration - Security</td>
<td>EPPCW_ADMIN_SEC</td>
<td>In a workspace template, click the Administration link.</td>
<td>Manage security options for a template.</td>
</tr>
<tr>
<td>Administration - Advanced</td>
<td>EPPCW_ADMIN_ADV</td>
<td>In a workspace template, click the Administration link.</td>
<td>Access tools and utilities that enable you to implement advanced configurations for a workspace template.</td>
</tr>
</tbody>
</table>

**Managing Workspace Templates**

Access the Manage Templates page (Portal Administration, Workspaces, Manage Templates).
Manage Templates page

**Filter Templates**

- **Category**: Select the category in which you want to search for the template that you want to manage.
- **Owner**: Select the owner of the template that you want to manage.
- **Status**: Select the Active check box or the Inactive check box to indicate the status of the workspace or template that you want to manage.
- **Keyword**: Enter any keywords that you want to use to narrow your search results. The keywords you enter will be matched against any text that appears in the title (label) or description of a template.
- **Search**: Click to perform your requested search.
- **Reset**: Click to clear all keywords that you entered.

**Templates**

- **Select**: Select a check box to indicate that you want to perform a managerial action on the workspace.
<table>
<thead>
<tr>
<th><strong>Template</strong></th>
<th>Displays the name of the workspace template. Click the link to access the template.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Category</strong></td>
<td>The system displays the category to which the template is assigned.</td>
</tr>
<tr>
<td><strong>Owner</strong></td>
<td>The system displays the name of the template owner.</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>The system displays the status of the template, active or inactive.</td>
</tr>
<tr>
<td><strong>Activate</strong></td>
<td>Click to reactivate the selected template.</td>
</tr>
<tr>
<td><strong>Deactivate</strong></td>
<td>Click to deactivate the selected template. The template is no longer accessible or usable by members, but its data continues to be stored in your database.</td>
</tr>
<tr>
<td><strong>Delete</strong></td>
<td>Click to delete the selected template. You are prompted to confirm your deletion.</td>
</tr>
</tbody>
</table>

### Creating Workspace Templates

Access the Create Workspace Template page (Portal Administration, Workspaces, Create Template).

![Create Workspace Template](image)

#### Create Workspace Template page

- **Name**: Enter a name for the template. This name becomes an available value in the Template field on the Select a Workspace Template page.
- **Description**: Enter a description of the template. The system displays this description when the template is selected on the Select a Workspace Template page.
- **Save**: Click to create and save the template definition. After the save is complete, the system takes you to the Template Created page.

### Accessing the Newly Created Template

After you save a new template, the system takes you to the Template Created page, where you click the template name link to display the administration pages for the new template.
Working With Templates and the Action Item Lists Module

When you create templates in the Action Item Lists module, the system does not create a default list. However, when you create Workspaces the system does create a default list. If the template has any manually created lists, the Workspace created from that template will contain a default list (with the same name as the Workspace) plus any manually created lists in the template.

Setting Workspace Template Properties

Access the Administration - Properties page (in a workspace template, click the Administration link).

Administration - Properties page

Name
The template name you entered on the Create Workspace Template page appears, but you can override it. This name becomes an available value in the Template field on the Select a Workspace Template page.

Description
Enter a description of the template. This description appears when the template is selected on the Select a Workspace Template page.

Default Category
Select a category for the workspace template. This category appears by default on the Name and Describe Workspace page for a workspace created using this template.

Allow category override
Select to override the selected category on individual workspaces created using this template. You perform this override on the Name and Describe Workspace page.
**Branding Theme**

Displays the branding theme that will be used to display workspaces created using this template. This field is editable for template owners and administrators.

Branding themes available for selection are derived from the assembled themes as defined in the PeopleSoft Applications Portal branding feature.

**Select Overridable Elements**

Select this link to display the Select Branding Theme and Overrides page, where you can select branding elements that you want to change.

**Selecting Branding Overrides**

Access the Select Branding Theme and Overrides page (click the Select Overridable Elements link on the Administration - Properties page).
Select Branding Theme and Overrides page

Determine which branding elements can be overridden by workspace administrators.

**Effective Date**  
Specify the date that the header or footer should take effect.

**Add**  
Click this button to add another effective-dated version of the theme.
Delete
Click this button to delete the current effective-dated version of the theme.

Theme ID
Displays the object name of the branding theme.

Details
Click this link to display the Assemble Branding Theme page, where you can define a branding theme.


Override Section
Indicates if the override value applies to the homepage header, homepage footer, or target page header.

Select
Select the check boxes for the elements you want to override.

Element ID
Displays a unique numeric identifier for the element. These elements are hard-coded and serve as the foundation for PeopleSoft Applications Portal Branding.

Description
Displays a description of the element type, including its bind variable. This value becomes the default description of the elements listed in the HTML Layouts and Element Selection page.

See Also


Selecting Template Members
Access the Administration - Members page (in a workspace template, click the Administration link and then select the Members tab).
Administration - Members page


**Members**

Use the Members group box to manage the membership settings of the workspace template. The system provides these settings by default to the workspaces that are created using this template.

You can also use the Add Members page and the Administration - Members page to manage the membership of a workspace built using this template.


**Type**

Select the type of member you want to add to the workspace template. Users and roles that are available for selection are those who have access to the PAPP5300 permission list. Available values include:

- **Role:** Select to enable selecting a role or a group of users in the Member Name field. Available roles are defined in the Roles component.


- **User:** Select to enable selecting a user in the Member Name field. You must select this value to be able to select a Privilege Set field value of Owner or Administrator. Available users are defined in the User Profiles component.

Privilege Set

Select the privilege set you want to assign by default to the member in workspaces created using this template. You must select a Type field value of User to be able to select the Owner or Administrator value. Available values are:

Administrator.
Approver.
Contributor.
Moderator.
Owner.
Viewer.


Click to view information about the privilege set.

Selecting Template Modules

Access the Administration - Modules page (in a workspace template, click the Administration link and select the Modules tab).
Administration - Modules page

Select the modules that you want to include in the workspace template.

The system provides these settings by default to the workspaces that are created using this template. The Welcome, Members, and Administration module names are selected and unavailable for editing because they are required in a workspace.

The Properties link associated with a module enables you to further define the properties and options available in a module.

**Mapping Keys for Context-Sensitive Pagelets**

Access the Key Name Mapping page (click the Map link for a context-sensitive pagelet on the Administration - Modules page).
Key Name Mapping page

When you add a related pagelet to a workspace and designate it as being context-sensitive, the pagelet is passed the same key names and values that are associated with the workspace. These keys are passed to the pagelet as query string parameters. You can override the key names for a related pagelet by adding the EPPCW_KEYMAPPING attribute to the content reference representing the pagelet.

You access the content reference of the pagelet by clicking the Structure and Content link on the Administration - Advanced page. The syntax for the attribute value is:

```
KEY1ORIGNAME=KEY1NEWNAME;
KEY2ORIGNAME=KEY2NEWNAME;
...;
KEYNORIGNAME=KEYNNEWNAME
```

See Also


Chapter 2, "Setting Up Collaborative Workspace Options and Templates," Configuring Advanced Options for Templates, page 41

Defining Document Module Options for a Template

Access the Documents Module Properties page (click the Properties link for the Documents module on the Administration - Modules page).
Documents Module Properties

Set the Documents module properties for this workspace. Select "Cascade to All Child Folders" to cascade the content default approval setting to all the Document folders in this workspace. The changes take effect after saving.

- **Enable Content Versions**: Select to enable different versions of content.
- **Enable Content Checkout**: Select to enable the check in and check out of documents posted to the Documents module in workspaces created using this template. If you select this option, fields and options enabling the check in and check out of documents appear appropriately on the pages used to post documents to the Documents module.
- **Enable Content Approval**: Select to enable the approval of documents posted to the Documents module in workspaces created using this template. If you select this option, fields and options enabling the approval of documents appear appropriately on the pages used to post documents to the Documents module.
- **Cascade to All Child Folders**: Select to set the default approvals for all new content in child folders. The approval settings are transferred to all child folders when the page is saved. This setting does not affect existing child content approval settings.

**Enable Content Types to Add**

- **File Attachment**: Select to enable the posting of file attachments to the Documents module in workspaces created using this template. If you select this option, the File Attachment option appears on the Documents - Add Documents page in the Documents module.

  **Note.** If file attachments are added to the template itself, these attachments will not appear in workspaces created from the template.

- **Text or HTML**: Select to enable the posting of text and HTML documents to the Documents module in workspaces created using this template. If you select this option, the Text or HTML option appears on the Documents - Add Documents page in the Documents module.
Managed Content

Select to enable the posting of managed content to the Documents module in workspaces created using this template. If you select this option, the Managed Content option appears on the Documents - Add Documents page in the Documents module.

Adding or Editing Related Pagelets in a Template

Access the Add Pagelet page (click the Add Related Pagelet button on the Administration - Modules page).

Access the Edit Pagelet page (click the Edit Pagelet button for an existing pagelet on the Administration - Modules page).
Add Pagelet page

Use the Add Pagelet page to add an already defined pagelet to be available on the workspace homepage (Welcome tab) or the workspace Related Data tab.

**Source Application**

Select the portal registry that is the source of the pagelet definition.

To select the portal registry from the node of a content provider system, that node must already be defined as a source application.

Pagelet Folder
Select the portal folder that is the source of the pagelet definition.

Pagelet Name
Select the pagelet definition.

Pagelet Name
Displays the ID of the pagelet.

Pagelet Title
Displays the title of the pagelet, which you can modify.

Description
(Optional) Enter a description for the pagelet.

Pagelet Folder
Select the folder in which the pagelet definition will be stored. PeopleSoft Applications is the default folder for workspace pagelets.

Pagelet Security
Select a pagelet security option:

- Publish as Public — Select to designate that all users can access the pagelet.

- Publish with Security Roles — Select to use the already assigned role- or permission list-based security for the pagelet.

Author Access
Select to provide the pagelet author with access to the pagelet regardless of any security restrictions assigned to the pagelet. This access is granted based on the author's user ID.

Select
Select one or more workspace tabs for this pagelet:

- Related Data — The Related Data module.

- Welcome — The workspace homepage tab.

Pagelet Behavior
Select the default behavior for the pagelet:

- Optional — The pagelet will not appear on the workspace tab. Do not select this option.

- Optional-Default — The pagelet will appear on the workspace tab for all members. Only the administrator can modify the pagelet position. A member can remove the pagelet from his or her workspace homepage.

- Required — The pagelet will appear on the workspace tab for all members. The pagelet position can be modified by the administrator only.

- Required-Fixed — The pagelet will appear on the workspace tab for all members. The pagelet column can be modified by the administrator only; however, the pagelet will always appear at the top of the column.
Defining Contextual Data for Templates

Access the Administration - Contextual Data page (in a workspace template, click the Administration link and select the Contextual Data tab).

![Administration - Contextual Data page](image)

Use the Related Transactions group box to associate workspaces you built using this template with specific transactions.

**Type**

Select the type of transaction you want to associate with the template.

*Not Registered*: Select to associate the template with a transaction that is not registered in the PeopleSoft database environment. When you select this value, the Node Name, URL, and Label fields appear.

*Registered*: Select to associate the template with a transaction that is registered in the PeopleSoft database environment. When you select this value, the Portal / Subsite and Transaction Name fields appear.

**Portal / Subsite**

Select the portal or subsite in which the internal transaction to which you want to tie this template resides. This field appears when the Type field is set to *Registered*.

**Transaction Name**

Enter one or more internal transactions to which you want to associate this template. This field appears when the Type field is set to *Registered*.

Click the Select Transaction button to access the Select Transaction page, where you can select a transaction from a graphical representation of the portal registry.

**Component Interface**

Select a component interface to update the template with the key values of the transaction you are working with in Step 2 of the wizard. Any component interface that has the GET tied to the component will update the template and, when you create the workspace using that template, the prompt will show the key values for you to select.

This field appears when the Type field is set to *Registered*. 
<table>
<thead>
<tr>
<th>Node Name</th>
<th>Select the node through which the external transaction to which you want to associate this template should be accessed. These nodes are defined content providers from which content can be retrieved and rendered. This field appears when the Type field is set to Not Registered.</th>
</tr>
</thead>
<tbody>
<tr>
<td>URL</td>
<td>Enter the URL to the external transaction to which you want to associate this template. This field appears when the Type field is set to Not Registered.</td>
</tr>
<tr>
<td>Label</td>
<td>Enter the label that you want to appear for an unregistered transaction. This field appears when the Type field is set to Not Registered.</td>
</tr>
<tr>
<td>Only for selected transactions</td>
<td>Select if you want this template to be available for selection only when a user chooses to create workspaces from the related transactions you define on this page. When a user creates a workspace based on any other transaction, this template will not be available for selection.</td>
</tr>
<tr>
<td>Display</td>
<td>Select if you want the key field and its transactional value to appear in a workspace created from this template using a transaction that contains the key field. Deselect this option to hide certain keys and their values from workspace users.</td>
</tr>
<tr>
<td>Record Name</td>
<td>Select the record name that you want to use to associate with the workspace template.</td>
</tr>
<tr>
<td>Key</td>
<td>Enter the key field name that you want to associate with the workspace template.</td>
</tr>
<tr>
<td>Custom Label</td>
<td>Enter an overriding value for the key label. If you choose to display the key, this label will appear alongside the key field value below the menu of a workspace created from this template for a transaction that contains the key.</td>
</tr>
<tr>
<td>Allow key overrides</td>
<td>Select if you want an administrator to be able to edit these keys in a workspace created using this template.</td>
</tr>
</tbody>
</table>

Note: Modifying existing field values or options set in this group box initiates a function that updates all workspace pagelet content reference URLs that contain an attribute of EPPCW_PAGELET with a value of KEYS. This change affects all workspace pagelets as well as any related pagelets associated with the workspace in which the key was modified.
Selecting Transactions for a Template

Access the Select Transaction page (add a registered transaction and click the Select Transaction button on the Administration - Contextual Data page).

**Note.** You access this page by adding a transaction on the Contextual Data page. Set the type to registered, specify a portal name, and then click the prompt button.

Select Transaction page

**Portal / Subsite**
Displays the portal or subsite you selected on the Administration - Contextual Data page, but you can override this value. Select the portal in which the transaction you want to associate to the template resides.

**Search by**
*Description.*
*Label.*

**Search**
Click to execute the search you entered using the Search by elements.

You can also manually click through the folder tree to locate the transaction. Select the transaction you want to associate with the template and click OK to return to the Administration - Contextual Data page and add the transaction to a template.
Copying Changes from Templates

Access the Administration - Copy Changes page (in a workspace template, click the Administration link and select the Copy Changes tab).

Use this page to make changes to all workspaces created from this template.

**Note.** This page is a portal registry copy only. No data is copied in the Copy Changes process.

**Items to Copy**

Select the options that you want to copy to the selected workspaces.

**Modules**
You can select to copy all modules or only ones selected on the Modules page by clicking the Details link.

**Related Pagelets**
You can copy pagelets from the Related Pagelets module. Click the Details link to view the Related Pagelets page.

**Branding Theme**
Select this check box to copy branding themes and any other allowable overrides.
Links

Select this option to copy internal or external links.

Target Workspaces

This region of the page lists all workspaces that have been generated using this template. Select the ones to which you want to copy the changes.

Note. If you are working with the base template, then this section will show all target templates created using the base template instead of target workspaces.

Copy Notification

Select this option to send an email to workspace owners informing them that changes were copied to their workspaces.

Determining Which Items to Copy

Access the Module Details page (click the Details link for modules on the Administration - Copy Changes page).

Access the Related Pagelets page (click the Details link for related pagelets on the Administration - Copy Changes page).

Module Details

After copying module(s), they can be either immediately activated on the welcome tab of the workspace or left inactive and available for the workspace administrator or owner to add as appropriate. Only module links and pagelets are copied. No data is copied to the target workspaces.

<table>
<thead>
<tr>
<th>Select</th>
<th>Module Item</th>
<th>Activate</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Welcome</td>
<td></td>
<td>The overview page of the collaborative workspace</td>
</tr>
<tr>
<td></td>
<td>Discussions</td>
<td></td>
<td>Maintain multiple discussion topics with members</td>
</tr>
<tr>
<td></td>
<td>Documents</td>
<td></td>
<td>Upload, organize and securely share documents with other members of the workspace</td>
</tr>
<tr>
<td></td>
<td>Links</td>
<td></td>
<td>Maintain a list of easily accessible links for the team</td>
</tr>
<tr>
<td></td>
<td>Action Item Lists</td>
<td></td>
<td>Maintain multiple Action Item Lists with members</td>
</tr>
<tr>
<td></td>
<td>Calendar</td>
<td></td>
<td>Maintain Calendar Events with members</td>
</tr>
<tr>
<td></td>
<td>Members</td>
<td></td>
<td>View a list of all members with links to user profiles</td>
</tr>
<tr>
<td></td>
<td>Related Data</td>
<td></td>
<td>Display related data pagelets for a specific workspace template</td>
</tr>
<tr>
<td></td>
<td>Polls</td>
<td></td>
<td>Maintain the workspace poll questions</td>
</tr>
<tr>
<td></td>
<td>Browses Workspaces</td>
<td></td>
<td>Access related collaborative workspaces or perform searches for specific workspaces to which you have access.</td>
</tr>
<tr>
<td></td>
<td>Administration</td>
<td></td>
<td>Manage the properties and members of your workspace</td>
</tr>
</tbody>
</table>

Module Details page

Use the Module Details page to select which modules to copy to the selected workspaces.
Use the Related Pagelets page to select which modules to copy to the selected workspaces.

**Defining Template Security**

Access the Administration - Security page (in a workspace template, click the Administration link and select the Security tab).

**Security Options**

- **Anyone Can Use This Template**
  - Select if you want this template to be available for selection without any user security restrictions.

- **Only Selected Users & Roles**
  - Select if you want to this template to be available for selection only by the specific users and roles you specify in the Users/Roles group box. When you select this option, the Users/Roles group box appears.

**Users/Roles**

The Users/Roles group box appears when you select the Only Selected Users & Roles option.
Type

Select the type of member you want to be able to access this workspace template. Available values include:

- **Role:** Select to be able to select a role or group of users in the Member Name field. You define available roles in the Roles component.

  See *PeopleTools 8.52: Security Administration PeopleBook*, "Setting Up Roles."

- **User:** Select to be able to select a user in the Member Name field. You define available users in the User Profiles component.

  See *PeopleTools 8.52: Security Administration PeopleBook*, "Administering User Profiles."

**Configuring Advanced Options for Templates**

Access the Administration - Advanced page (in a workspace template, click the Administration link and select the Advanced tab).

**Navigation**

Access utilities and tools that enable you to implement advanced navigation configurations for the workspace template. Add new modules to the workspace or access Pagelet Wizard to create new pagelets for use with the workspace.


See *PeopleTools 8.52: PeopleTools Portal Technologies PeopleBook*, "Administering Portals."
Pagelets
Access utilities and tools that enable you to implement advanced pagelet configurations for the workspace template.
See *PeopleTools 8.52: PeopleTools Portal Technologies PeopleBook*, "Using Pagelet Wizard to Create and Manage Pagelets".

Branding
Access utilities and tools that enable you to change the appearance of the portal.

---

**Importing and Exporting Template Data**

See the release notes on My Oracle Support for information about importing and exporting workspace data.
See My Oracle Support, Knowledge, Portal Solutions, Applications Portal.
Chapter 3

Creating Collaborative Workspaces

This chapter provides an overview of workspace creation and discusses how to:

- Create root-level workspaces.
- Create child workspaces.
- Create and update workspaces in batch mode.

Understanding Workspace Creation

In Oracle's PeopleSoft Applications Portal, when you create a collaborative workspace, you can create the workspace at the root of the workspace hierarchy or as a child of any existing workspace. When you create a root-level workspace, you typically use the five-step workspace creation wizard to guide you through the process of selecting a template, selecting workspace modules, and so on. When you create a child workspace, it inherits many of the characteristics of the parent workspace by default, and only one step is required to name the workspace and select a template.

The following example of the Workspaces - Hierarchy page shows four root-level workspaces. One of the root-level workspaces, Wiki WS, has a child workspace:

Example of root-level workspaces and child workspaces

You can create and update collaborative workspaces in batch mode. When you create or update workspaces in batch mode, you specify the workspace attributes to create or update in XML following the specifications of the workspace DTD.

You can create a workspace from each of the following locations:
• Workspaces - Search page
  From this page, you can create only root-level workspaces.

• Workspaces - Hierarchy page
  From this page, you can create root-level workspaces or child workspaces.

• Create Workspace menu item
  From this menu item, you can create only root-level workspaces.

• My Workspaces pagelet
  From this pagelet, you can create only root-level workspaces.

• Batch Create Workspaces page
  From this page, you can create only root-level workspaces.

• Related Links service
  If you added the Related Links related content service to the transaction page, you can create workspaces directly from the PeopleSoft application transaction for which you are creating the workspace.

  From this service, you can create only root-level workspaces. The benefits of creating a workspace from the Related Links service include:

  • The workspace automatically includes a link back to the PeopleSoft application transaction in the Links module.

  • If the option is selected when the workspace is created, the workspace can include discussions related to the PeopleSoft application transaction.

• Related Workspaces pagelet
  If you assigned the Related Workspaces pagelet to the transaction page using Context Manager, you can create workspaces directly from the transaction for which you are creating the workspace.

  From this pagelet, you can create only root-level workspaces. The benefits of creating a workspace from the Related Workspaces pagelet include:

  • On the Select a Workspace Template page, the workspace creation wizard prompts you with any available, recommended, workspace templates associated with the transaction.

  • On the Relate Workspace to a Transaction page, the workspace creation wizard populates applicable contextual data fields with values from the selected transaction.

  • The workspace automatically includes a link back to the transaction page in the Links module.

**Note.** The Workspaces - Search page and the Workspaces - Hierarchy page are also available through the Browse Workspaces module of each workspace.
Creating Collaborative Workspaces

This section discusses how to use the workspace creation wizard to create root-level workspaces by:

1. Selecting a workspace template.
2. Relating a workspace to a transaction (if applicable).
3. Naming and describing a workspace.
4. Selecting workspace modules.
5. Adding workspace members.

See Also

Chapter 5, "Working in Collaborative Workspaces," Working with the My Workspaces Pagelet, page 101


Chapter 5, "Working in Collaborative Workspaces," Using the Browse Workspaces Module, page 154
## Pages Used to Create Root-Level Workspaces

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select A Workspace Template</td>
<td>EPPCW_WIZ_TMPL</td>
<td>• Browse Workspaces Click the Create Workspace button.</td>
<td>Select the template on which you want to base the new workspace.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Browse Workspaces Select the Workspaces - Hierarchy page.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Portal Administration, Workspaces, Create Workspace</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the Create Workspace link in the My Workspaces pagelet.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the Save button on the Create and Link Workspace page in the Related Links service.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the Create Workspace link in the Related Workspaces pagelet.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the Select a Template button on any page in the Create A Collaborative Workspace wizard.</td>
<td></td>
</tr>
<tr>
<td>Relate Workspace to a Transaction</td>
<td>EPPCW_WIZ_KEYES</td>
<td>• Click the Next button on the Select A Workspace Template page.</td>
<td>If the workspace template on which you are basing the creation of your workspace contains contextual data, you can use this page to relate the workspace to specific data about a transaction; otherwise, the system skips this page during workspace creation.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the Relate Workspace button on any page in the Create A Collaborative Workspace wizard.</td>
<td></td>
</tr>
</tbody>
</table>
### Page Name Definition Name Navigation Usage

| Name and Describe Workspace | EPPCW_WIZ_DESCR | • Click the Next button the Relate Workspace to a Transaction page.  
|                           |                | • Select the Name and Describe Workspace button on any page in the Create A Collaborative Workspace wizard.  
|                           |                | Enter a name, description, and category to help identify the workspace.  
| Select Workspace Modules   | EPPCW_WIZ_MOD  | • Click the Next button on the Name and Describe Workspace page.  
|                           |                | • Select the modules you want to include in the workspace.  
| Add Members (Optional)     | EPPCW_WIZ_MBR  | • Click the Next button on the Select Workspace Modules page.  
|                           |                | • Select and invite members to participate in the new workspace.  
| Create User Account        | EPPCW_WIZ_EXTMBR | Click the Create Account button on the Add Members (Optional) page.  
|                           |                | Create a system account and ID to allow an external user to access this workspace.  

**Step 1: Selecting a Workspace Template**

Access the Select A Workspace Template page (Browse Workspaces and then click the Create Workspace button on the Search page or Browse Workspaces, select the Hierarchy page, and then click the Create Root Workspace button).
**Select A Workspace Template**

A Collaborative Workspace is a secure shared environment for communicating and working with invited members. You can configure a new environment by selecting the appropriate template used to create the workspace.

**Template:** Demo Workspace Template

**Description:** Demonstration workspace template used to create workspace instances

**Contextual Data:** Department ID, Department

Select A Workspace Template page

**Template**

Select the template on which you want to base your workspace.

If you accessed this wizard directly from the transaction for which you are building this workspace and the transaction is already associated with a workspace template, then the system selects a recommended template by default. You can override this template.

**Description**

The system displays a description of the selected template.

**Contextual Data**

If you selected a template and contextual data is already defined for the template, then the labels of the key fields selected to supply contextual data appear here.

**See Also**


---

**Step 2: Relating a Workspace to a Transaction**

Access the Relate Workspace to a Transaction page (click the Next button on the Select Workspace Template page).
Note. If no contextual data is required for this workspace, then the system skips this step and displays Step 3 automatically.

**Contextual Data**

If contextual data is defined for the workspace template, then the key fields selected to supply contextual data appear here. In addition, if you accessed this component directly from the transaction for which you are building this workspace, then applicable values appear in the key fields. If you did not access this component directly from a transaction, then you can enter your own values in the key fields.

For example, if you tied a template to a customer profile transaction with a key of customer ID, you could create a workspace that is contextually tied to a customer. Another example could involve a template tied to a help desk transaction with a key of case ID. You could create a workspace that is contextually tied to a specific case.

Note. While you can manually enter data on this page, we recommend that you populate these fields by creating a workspace directly from a transaction.

**See Also**


**Step 3: Naming and Describing a Workspace**

Access the Name and Describe Workspace page (click the Next button on the Relate Workspace to a Transaction page).
<table>
<thead>
<tr>
<th><strong>Name and Describe Workspace</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Enter a name, description and category in order to identify your workspace.</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Name</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter a name for the workspace. The name of the workspace appears in the header on the workspace homepage, at the top of the workspace menu, and anywhere workspaces are listed. For example, the name can appear on pages used to search for or manage workspaces, in pagelets, in search results, and so on.</td>
<td></td>
</tr>
<tr>
<td>Enter an optional description for the workspace.</td>
<td></td>
</tr>
<tr>
<td>This description becomes the default welcome text, which appears in the Welcome module if that module is configured for this workspace.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Category</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Select a category for the workspace.</td>
<td></td>
</tr>
<tr>
<td>If a category is defined for the workspace template, then the category appears by default. You can select a different category if the template definition specifies that the category can be overridden.</td>
<td></td>
</tr>
</tbody>
</table>

You can also use the Administration - Properties page, which you access from the workspace, to modify the workspace name, description, category, and other attributes.

**See Also**

Chapter 4, "Administering Collaborative Workspaces," Administering Workspace Properties, page 73

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**Step 4: Selecting Workspace Modules**

Access the Select Workspace Modules page (click the Next button on the Name and Describe Workspace page).
Select Workspace Modules page

Modules selected in the workspace template are selected by default on this page. You can select or remove modules as appropriate to your workspace. Removing a module simply hides the link to the module. Data is preserved and no activity in the module is deleted. If you select to include the module in the workspace in the future, all data present prior to its removal will still be available.

If you selected the Base Workspace Template, then the Member, Administration, and Welcome modules are required and cannot be deleted from the workspace. If you selected the Base Workspace Template Wiki, then the Member, Administration, and Wiki Content modules are required and cannot be deleted from the workspace.

You can also use the Administration - Modules page, which you access from the workspace, to add and remove workspace modules.

**See Also**

Chapter 4, "Administering Collaborative Workspaces," Administering Workspace Modules, page 79
Step 5: Adding Workspace Members

Access the Add Members (Optional) page (click the Next button on the Select Workspace Modules page).

Add Members (Optional) page

You can add members and create a user account using this page when you create the workspace. If the workspace template contains definitions for default members, those member names will appear on this page. You can also use the Administration - Members page, which you access from the workspace, to add and remove members.

See Chapter 4, "Administering Collaborative Workspaces," Administering Workspace Members, page 75.

Members

Send Invite

Select to send a notification to selected members alerting them that they were added as members to the workspace. The system uses default notification text that includes a link to the workspace homepage. Alternatively, you can send notifications after the workspace is created, which also allows you to modify the notification text on the Set Invitation Message page.

See Chapter 4, "Administering Collaborative Workspaces," Sending Invitations to Workspace Members, page 77.
Type
Select the type of member you want to add to the workspace. To be able to select Administrator or Owner in the Privilege Set field, you must select the User value here.

Available values include:

Role: Select to be able to select a role in the Member Name field. Available roles are derived from PeopleSoft roles defined on the Roles page.


User: Select to be able to select a user in the Member Name field. Available users are derived from PeopleSoft users defined on the User Profiles page.


Member Name
Select a name from the list of roles or users.

Privilege Set
Select a privilege level you want to assign to the member. To be able to assign the Administrator or Owner privilege level to a member, you must have selected User in the Type field. Available values are:

Administrator
Approver
Contributor
Moderator
Owner
Viewer


Add Workspace Member
Click to add another member to the workspace.

Create User Account
Click to access the Create User Account page, which enables you to enter a new user name and email account for an external member.

Note. The Create User Account button appears only if the Enable External Users option is set on the Installation Options page.


Finish
Click to finish workspace creation and access the workspace homepage.

Creating an External User Account
Access the Create User Account page.
Use the Create User Account page to create an account to allow an external user to access this workspace. The system user ID is based on the email address that you enter. The system will use this name as the description in the PeopleTools user profile. A dynamically created password will be mailed to the user enabling access to the workspace. When the external user logs in to the workspace for the first time, the Change Password page appears and the user is asked to change the password that was sent in the invitation.

**Email**
Enter a valid email address.

The system will truncate the system user ID generated from this email address at the @ symbol. For example, an email address of first.last@xyz.com will result in a user ID of FIRST.LAST.

**Name**
Enter a description for this account.

The system will use this value as the description in the PeopleTools user profile.

**Matching Accounts**
After you enter a valid email address and exit the Email field, if the system finds a matching email address, then the Matching Accounts group box appears, displaying the matching accounts.

**Create Account**
Click the Create Account button to create a new external user account and return to the Add Members (Optional) page.

**Cancel and Previous**
Click either button to return to the Add Members (Optional) page without creating an external user account.

**Finish**
The Finish button is not active on this page. Click the Create Account or Cancel button.

You can access and manage external user information from the Manage External User page.

Creating Child Workspaces

This section discusses how to create a child workspace.

Page Used to Create Child Workspaces

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Child Workspace</td>
<td>EPPCW_WS_CREATE</td>
<td>Browse Workspaces: Select the Workspaces - Hierarchy page.</td>
<td>Create a child workspace of the selected parent.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Select a parent workspace.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Click the Create Child Workspace button.</td>
<td></td>
</tr>
</tbody>
</table>

Creating a Child Workspace

Access the Create Child Workspace page (select a parent workspace and click the Create Child Workspace button on the Workspaces - Hierarchy page).

Create Child Workspace

Specify the workspace name, description and workspace template. The Copy Members Option specifies whether members are copied from the parent workspace, the template selected or members are not to be copied (the creator of the workspace is the sole member).

*Name: [input field]

Description: [input field]

Template: [dropdown menu]

Copy Members Option

- Copy From The Workspace
- Copy From The Template
- Do Not Copy Members

[Save] [Cancel]

Create Child Workspace page
Use the Create Child Workspace page to create a child of the parent workspace. As an alternative to the five steps of the workspace wizard, this page allows you to specify the name, description, template, and default members in one step. If the child workspace uses the same template as the parent, then the default option is to copy workspace members from the parent. If the child workspace uses a different template, then the default option is to copy workspace members from the template.

**Name**

Enter a name for the workspace. The name of the workspace appears in the header on the workspace homepage, at the top of the workspace menu, and anywhere workspaces are listed—for example, on pages to search for or manage workspaces, in pagelets, in search results, and so on.

**Description**

Enter an optional description for the workspace.

This description also becomes the default welcome text, which is displayed in the Welcome module if that module is configured for this workspace.

**Template**

Select the template on which you want to base your child workspace.

The template used by the parent workspace is selected by default, but can be overridden.

**Copy Members Option**

Select the copy option:

- *Copy From The Workspace* — Copies the members from the parent workspace.

  **Note.** When the child's template is the same as the parent's, this option is selected by default.

- *Copy From The Template* — Copies the members from the template.

  **Note.** When the child's template is different from the parent's, this option is selected by default.

- *Do Not Copy Members* — No members are added to the workspace by default.

---

**Creating and Updating Workspaces in Batch Mode**

This section discusses how to run the process to create and update workspaces in batch mode.
Pages Used to Create and Update Workspaces in Batch Mode

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Batch Create Workspaces</td>
<td>EPPCW_IMPORT_RUN</td>
<td>Portal Administration, Workspaces, Batch Create Workspaces</td>
<td>Specify the XML and other parameters for the workspace batch process.</td>
</tr>
<tr>
<td>Document Type Definition (DTD)</td>
<td>EPPCW_IMPORTDTD_SBP</td>
<td>Click the View Document Type Definition (DTD) link on the Batch Create Workspaces page.</td>
<td>Review the DTD that provides the specification for the XML for the workspace batch process.</td>
</tr>
<tr>
<td>Sample XML File</td>
<td>EPPCW_IMPORTXML_SBP</td>
<td>Click the View Sample XML File link on the Batch Create Workspaces page.</td>
<td>View example XML that can be copied and modified to be the input to the workspace batch process.</td>
</tr>
</tbody>
</table>

Running the Process to Create and Update Workspaces in Batch Mode

This section discusses how to:

- Create and update workspaces in batch.
- Review the DTD.
- View the example XML.
- Modify XML attributes for workspace creation and update.

**Creating and Updating Workspaces in Batch**

Access the Batch Create Workspaces page (Portal Administration, Workspaces, Batch Create Workspaces, Batch Create Workspaces).
Batch Create Workspaces

Use the Batch Create Workspaces page to specify XML and other parameters for the workspace batch process (EPPCW_IMPORT). The EPPCW_IMPORT Application Engine program returns a standard processing log for the job and an XML file of any workspaces that had errors and were not created by the process, for example, workspaces that had blank values for required elements. You can correct the XML blocks and resubmit them for processing.

**Report Manager**
Click to access the Report Manager module to view report results.


**Process Monitor**
Click to access the Process Monitor to view the status of job requests.


**Run / Schedule**
Click to schedule and run this process.

Process Scheduler runs the EPPCW_IMPORT process at the user-defined time.

See *PeopleTools 8.52: PeopleSoft Process Scheduler PeopleBook*, "Submitting and Scheduling Process Requests."

**View Document Type Definition (DTD)**
Click to review the DTD that provides the XML specifications for the workspace batch process.

**View Sample XML File**  
View example XML that demonstrates how to create and update workspaces.  
Copy and modify this XML to be the input to the workspace batch process.  
Save the XML as a file, or paste the modified XML directly into the text box.  

**Select File**  
Click to browse to a local file that you want to use to create or modify workspaces in batch mode.

**Upload**  
Insert the XML that defines the workspaces to be created or updated.  

**Notify Workspace Owners**  
Select this check box to send an email to the owner of each workspace indicating that the workspace was created or modified.

The output file is named EPPCW_BATCH_ERROR.xml and is written to the application server. Use the Process Monitor to access the log file.

**Reviewing the DTD**

Access the Document Type Definition (DTD) page (click the View Document Type Definition (DTD) link on the Batch Create Workspaces page).

Use the Document Type Definition (DTD) page to review the DTD, which provides the XML specifications for the workspace batch process. The workspace DTD is included here for reference:
Viewing the Example XML

Access the Sample XML File page (click the View Sample XML File link on the Batch Create Workspaces page).

Use the Sample XML File page to view example XML that demonstrates how to create and update workspaces. You can copy and modify this XML to be the input to the workspace batch process. Save the XML as a file or paste the modified XML directly into the text box on the Batch Create Workspaces page.


Modifying XML Attributes for Workspace Creation and Updating

Copy the delivered sample XML and modify it to create or update specific workspaces. To create or update multiple workspaces, copy and modify the block of XML for each workspace you are modifying or creating.

The workspace DTD specifies the following XML elements:

<workspaces> Requires at least one <workspace> element.
Each `<workspace>` element corresponds to a workspace and has two attributes:

- **title**
  
  Enter the name of the workspace. This attribute is required for ADD mode only.

- **mode**
  
  Enter `ADD` or `UPDATE`. If you are updating the workspace, then the portal name becomes a required attribute.

Enter the name of the portal. This attribute is required for UPDATE mode only.

Optional attribute. Enter a text string describing the workspace.

Optional attribute. Enter text that you want to appear as a welcome message in the Welcome pagelet.

Optional attribute. Enter the text that is sent out in an email as an invitation to participate in the workspace.

Optional attribute. Enter the name of the category you want to assign to the workspace.

Optional attribute. Enter the template name for the workspace.

Optional attribute. Enter the date that the workspace becomes valid.

Optional attribute. Enter the date that the workspace is no longer valid.

Each `<workspace>` element requires a `<members>` element, which in turn requires at least one `<member>` element.
<member>

Each <member> element corresponds to a workspace member and has three required elements:

- <name>
  Displays the user ID or role name of the workspace member.

- <type>
  Enter USER or ROLE.

- <privilege>
  Enter one of the following values:
  - EPPCW_OWNER
  - EPPCW_ADMIN
  - EPPCW_APPROVER
  - EPPCW_VIEWER
  - EPPCW_MODERATOR
  - EPPCW_VIEWER

<keys>

The <keys> element is optional and is only valid when the workspace template defines contextual keys. If used, you must define at least one <key> element.
Each `<key>` element corresponds to a contextual data key for the workspace and has four required elements:

- `<recname>`
  Displays the name of the record name.

- `<keyname>`
  Displays the name of the contextual data key.

- `<keyvalue>`
  Displays the value of the contextual key.

- `<keydesc>`
  Displays the custom label for the contextual data key.

- `<keyshow>`
  Enter `Y` or `N` to indicate whether the key appears in the workspace menu on the homepage.

---

**Note.** The `<keyshow>` parameter is equivalent to the Display option on the Administration - Contextual Data page.
Chapter 4

Administering Collaborative Workspaces

This chapter provides an overview of workspace administration and workspace privilege sets and discusses how to:

• Set up a workspace.
• Designate the content and layout of the workspace homepage.
• Manage the status of workspaces.
• Move a workspace in the workspace hierarchy.
• Import and export workspace data.
• Manage external user accounts for workspaces.

Understanding Workspace Administration

In Oracle's PeopleSoft Applications Portal, workspace administration tasks occur inside and outside of the workspace itself. This chapter covers both types of activities.

To get a workspace ready for use by workspace members, the workspace administrator is responsible for doing the following tasks within the workspace:

1. Setting up the workspace—that is, adding workspace members, selecting workspace modules, and so on.
2. Designating the content and layout of the workspace homepage.

After a workspace is up and running, additional administrative tasks can include:

• Managing the status of workspaces—that is, inactivating or reactivating workspaces, deleting workspaces, or setting workspaces to read-only.
• Moving a workspace in the workspace hierarchy.
• Importing and exporting workspace data.
• Managing external user accounts for workspaces.
Understanding Workspace Privilege Sets

This section provides an overview of workspace privileges and discusses:

- Welcome module privilege
- Wiki Content module privileges
- Discussions module privileges
- Documents module privileges
- Blogs module privileges
- Links module privileges
- Action Item Lists module privileges
- Calendar module privileges
- Members module privileges
- Related Data module privileges
- Polls module privileges
- Browse Workspaces module privileges
- Administration module privileges

Workspace Privileges

When you add a member to a workspace, you assign him or her one of the following delivered privilege sets:

- Owner
- Administrator
- Approver
- Moderator
- Contributor
- Viewer

This security defined for a member at the workspace level defines a member's privileges at the workspace module level. For example, a member defined as a viewer for a workspace will have viewer privileges in all modules.

Note. A Manager Permission List is available on the Installation Options page. This permission list enables a high-level user to create and manage workspaces and manage existing workspaces by activating, deactivating, or deleting a workspace. Workspace access and actions are restricted by member privileges on the Workspace definition.
**Welcome Module Privilege**

The following table shows the Welcome-module-related privilege.

<table>
<thead>
<tr>
<th>Privilege</th>
<th>Privilege Set</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change layout and modify content.</td>
<td>Owner, Administrator</td>
</tr>
</tbody>
</table>

**Wiki Content Module Privileges**

The following table shows the Wiki Content module-related privileges provided by applicable privilege sets.

<table>
<thead>
<tr>
<th>Privilege</th>
<th>Privilege Set</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contribute wiki content.</td>
<td>Owner, Administrator, Approver, Moderator, Contributor</td>
</tr>
<tr>
<td>View wiki content.</td>
<td>Owner, Administrator, Approver, Moderator, Contributor, Viewer</td>
</tr>
</tbody>
</table>

**Discussions Module Privileges**

The following table shows the Discussion module-related privileges provided by applicable privilege sets.

<table>
<thead>
<tr>
<th>Privilege</th>
<th>Privilege Set</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add and delete topics (individual).</td>
<td>Owner, Administrator, Moderator, Contributor</td>
</tr>
<tr>
<td>Add and delete responses (individual).</td>
<td>Owner, Administrator, Moderator, Contributor</td>
</tr>
<tr>
<td>Add and delete topics (all).</td>
<td>Owner, Administrator, Moderator</td>
</tr>
<tr>
<td>Add and delete responses (all).</td>
<td>Owner, Administrator, Moderator</td>
</tr>
<tr>
<td>View topics and responses.</td>
<td>Owner, Administrator, Moderator, Contributor, Viewer</td>
</tr>
</tbody>
</table>

**Documents Module Privileges**

The following table shows the Documents module-related privileges provided by applicable privilege sets.

<table>
<thead>
<tr>
<th>Privilege</th>
<th>Privilege Set</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add and delete pieces of content.</td>
<td>Owner, Administrator, Approver, Moderator, Contributor</td>
</tr>
<tr>
<td>Add and delete folders.</td>
<td>Owner, Administrator, Approver, Moderator, Contributor</td>
</tr>
<tr>
<td>View hierarchy and content.</td>
<td>Owner, Administrator, Approver, Moderator, Contributor, Viewer</td>
</tr>
</tbody>
</table>
Blogs Module Privileges

The following table shows the Discussion module-related privileges provided by applicable privilege sets.

<table>
<thead>
<tr>
<th>Privilege</th>
<th>Privilege Set</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage blog.</td>
<td>Owner, Administrator, Moderator</td>
</tr>
<tr>
<td>Add blog posts.</td>
<td>Owner, Administrator, Approver, Moderator, Contributor</td>
</tr>
<tr>
<td>Add comments and replies.</td>
<td>Owner, Administrator, Approver, Moderator, Contributor</td>
</tr>
<tr>
<td>View blog posts.</td>
<td>Owner, Administrator, Approver, Moderator, Contributor, Viewer</td>
</tr>
</tbody>
</table>

Links Module Privileges

The following table shows the Links module-related privileges provided by applicable privilege sets.

<table>
<thead>
<tr>
<th>Privilege</th>
<th>Privilege Set</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add and delete links. (individual)</td>
<td>Owner, Approver, Moderator, Contributor</td>
</tr>
<tr>
<td>Add and delete links. (all)</td>
<td>Owner, Administrator</td>
</tr>
<tr>
<td>Add and delete folders. (individual)</td>
<td>Owner, Approver, Moderator, Contributor</td>
</tr>
<tr>
<td>Add and delete folders. (all)</td>
<td>Owner, Administrator</td>
</tr>
<tr>
<td>View hierarchy and content.</td>
<td>Owner, Administrator, Moderator, Contributor, Viewer</td>
</tr>
</tbody>
</table>

Action Item Lists Module Privileges

The following table lists privileges for the Action Item Lists module and the related privilege sets.

<table>
<thead>
<tr>
<th>Privilege</th>
<th>Privilege Set</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add and edit any action item.</td>
<td>Owner, Moderator, Administrator, Contributor, Approver</td>
</tr>
<tr>
<td>Delete any action item.</td>
<td>Owner, Moderator, Administrator</td>
</tr>
<tr>
<td>Delete list.</td>
<td>Owner, Moderator, Administrator</td>
</tr>
<tr>
<td>Delete own action items.</td>
<td>Owner, Moderator, Administrator, Contributor Approver</td>
</tr>
</tbody>
</table>
Privilege Privilege Set
View action items. Owner, Moderator, Administrator, Contributor, Viewer, Approver
Edit List. Administrator, Owner, Moderator

**Calendar Module Privileges**

The following table lists privileges for the Calendar module and the related privilege sets.

<table>
<thead>
<tr>
<th>Privilege</th>
<th>Privilege Set</th>
</tr>
</thead>
<tbody>
<tr>
<td>View events.</td>
<td>Administrator, Contributor, Viewer</td>
</tr>
<tr>
<td>Add events.</td>
<td>Administrator, Contributor</td>
</tr>
<tr>
<td>Edit own events.</td>
<td>Administrator, Contributor</td>
</tr>
<tr>
<td>Delete own events.</td>
<td>Administrator, Contributor</td>
</tr>
<tr>
<td>Edit any event.</td>
<td>Administrator</td>
</tr>
<tr>
<td>Delete any event.</td>
<td>Administrator</td>
</tr>
<tr>
<td>Edit calendar properties.</td>
<td>Administrator</td>
</tr>
<tr>
<td>Add a calendar.</td>
<td>Administrator</td>
</tr>
<tr>
<td>Delete a calendar.</td>
<td>Administrator</td>
</tr>
</tbody>
</table>

**Members Module Privileges**

The following table shows the Members module-related privileges provided by applicable privilege sets.

<table>
<thead>
<tr>
<th>Privilege</th>
<th>Permission Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add and delete members.</td>
<td>Owner, Administrator</td>
</tr>
<tr>
<td>Change profile details. (individual)</td>
<td>Owner, Administrator, Moderator, Contributor</td>
</tr>
<tr>
<td>Change profile details. (all)</td>
<td>Owner, Administrator</td>
</tr>
<tr>
<td>View members and profiles.</td>
<td>Owner, Administrator, Moderator, Contributor, Viewer</td>
</tr>
</tbody>
</table>

**Related Data Module Privileges**

The following table shows the Related Data module-related privileges provided by applicable privilege sets.
<table>
<thead>
<tr>
<th>Privilege</th>
<th>Privilege Set</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add and delete pagelets.</td>
<td>Owner, Administrator</td>
</tr>
<tr>
<td>Change layout.</td>
<td>Owner, Administrator</td>
</tr>
</tbody>
</table>

**Polls Module Privileges**

The following table lists privileges for the Community Calendars module and the related privilege sets.

<table>
<thead>
<tr>
<th>Privilege</th>
<th>Privilege Set</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access poll results.</td>
<td>Administrator, moderator, publisher</td>
</tr>
<tr>
<td>Assign members.</td>
<td>Administrator, moderator</td>
</tr>
<tr>
<td>Assign respondents.</td>
<td>Administrator, moderator, publisher</td>
</tr>
<tr>
<td>Delete poll definition.</td>
<td>Administrator</td>
</tr>
<tr>
<td>Delete questions and responses.</td>
<td>Administrator, moderator, publisher</td>
</tr>
<tr>
<td>Edit poll metadata.</td>
<td>Administrator, moderator, publisher</td>
</tr>
<tr>
<td>Publish as pagelet.</td>
<td>Administrator, publisher</td>
</tr>
<tr>
<td>Update questions.</td>
<td>Administrator, author, moderator, publisher</td>
</tr>
<tr>
<td>View poll definition.</td>
<td>Administrator, author, moderator, publisher, viewer</td>
</tr>
</tbody>
</table>

**Browse Workspaces Module Privileges**

All workspace members have access to this module.

**Administration Module Privileges**

The following table shows the Administration module-related privileges provided by applicable privilege sets.

<table>
<thead>
<tr>
<th>Privilege</th>
<th>Privilege Set</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add/delete pagelets.</td>
<td>Owner, Administrator</td>
</tr>
<tr>
<td>Add modules.</td>
<td>Owner, Administrator</td>
</tr>
<tr>
<td>Change workspace properties.</td>
<td>Owner, Administrator</td>
</tr>
<tr>
<td>Delete modules.</td>
<td>Owner, Administrator</td>
</tr>
</tbody>
</table>
### Privilege

<table>
<thead>
<tr>
<th>Privilege</th>
<th>Privilege Set</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit workspace layout.</td>
<td>Owner, Administrator</td>
</tr>
<tr>
<td>Update contextual data.</td>
<td>Owner, Administrator</td>
</tr>
<tr>
<td>Update valid dates.</td>
<td>Owner</td>
</tr>
<tr>
<td>Update welcome text.</td>
<td>Owner, Administrator</td>
</tr>
</tbody>
</table>

### Setting Up a Workspace

This section discusses how to:

- Administer workspace properties.
- Administer workspace members.
- Administer workspace modules.
- Administer contextual data.
- Administer workspace feeds.
- Configure advanced options for a workspace.

### Pages Used to Define Details of Workspaces

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration - Properties</td>
<td>EPPCW_ADMIN_PROP</td>
<td>In the workspace menu, click the Administration link.</td>
<td>Enter detailed properties of a workspace including a name, description, category, valid dates, and welcome text.</td>
</tr>
<tr>
<td>Select Category</td>
<td>EPPCW_CATG_SELECT</td>
<td>Click the Search Categories button on the Administration - Properties page.</td>
<td>Select the category that you want to assign to the workspace. See Chapter 2, &quot;Setting Up Collaborative Workspace Options and Templates.&quot; Setting Up the Workspace Category Hierarchy, page 13.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Administration - Members</td>
<td>EPPCW_ADMIN_MBR</td>
<td>In the workspace menu, click the Administration link. Select the Members tab.</td>
<td>Manage the membership settings of a workspace.</td>
</tr>
<tr>
<td>Set Invitation Message</td>
<td>EPPCW_ADMIN_INVITE</td>
<td>Click the Invitation Message link on the Administration - Members page.</td>
<td>Write a member invitation message that you want to use as the default to invite members to participate in the workspace.</td>
</tr>
<tr>
<td>Create User Account</td>
<td>EPPCW_ADMIN_EXTUSR</td>
<td>Click the Create User Account button on the Administration - Members page.</td>
<td>Create a new account for an external user or look up existing external accounts by email address.</td>
</tr>
<tr>
<td>Administration - Modules</td>
<td>EPPCW_ADMIN_MOD</td>
<td>In the workspace menu, click the Administration link. Select the Modules tab.</td>
<td>Select the modules that you want to include in the workspace.</td>
</tr>
<tr>
<td>Documents Module Properties</td>
<td>EPPCW_DC_CATGOPTS</td>
<td>In the workspace menu, click the Administration link. Select the Modules tab. Click the Properties link for the Documents module.</td>
<td>Determine properties for the Documents module such as whether checkouts, approvals, and version control are enabled.</td>
</tr>
<tr>
<td>Add Pagelet</td>
<td>EPPPB_CP_ADD</td>
<td>Click the Add Related Pagelet button on the Administration - Modules page.</td>
<td>Select a pagelet definition from a source portal, and add it to the template.</td>
</tr>
<tr>
<td>Edit Pagelet</td>
<td>EPPPB_CP_EDIT</td>
<td>Click the Edit Pagelet button for a related pagelet on the Administration - Modules page.</td>
<td>Edit the definition for a related pagelet.</td>
</tr>
<tr>
<td>Key Name Mapping</td>
<td>EPPCW_ADMIN_KEYMAP</td>
<td>Click the Map link for a related pagelet on the Administration - Modules page.</td>
<td>Specify and optionally rename the keys passed to the pagelet.</td>
</tr>
<tr>
<td>Administration - Contextual Data</td>
<td>EPPCW_ADMIN_KEYS</td>
<td>In the workspace menu, click the Administration link. Select the Contextual Data tab.</td>
<td>Manage contextual data associated with the workspace. For example, you can enter data that ties the workspace to one or more transaction key fields.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Publish Feed Definition (Workspace Feeds)</td>
<td>PTPF_PUB_AS_FEED</td>
<td>• In the workspace menu, click the Administration link.</td>
<td>Define feed security options, enter additional feed properties, and access advanced options.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>When a workspace feed has not been published for this workspace, select the Feed tab.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the Edit button on the Publish as Feed page.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the Add Feed button on the Publish as Feed page.</td>
<td></td>
</tr>
<tr>
<td>Advanced Feed Options (Workspace Feeds)</td>
<td>EPPCW_PUB_ADVOPT</td>
<td>Click the Advanced Options link on the Publish Feed Definition page.</td>
<td>Select the workspace modules to be published and other advanced options for a workspace feed.</td>
</tr>
<tr>
<td>Publish as Feed (Workspace Feeds)</td>
<td>EPPCW_PUB_AS_LIST</td>
<td>• In the workspace menu, click the Administration link.</td>
<td>Review, edit, add, or delete feed definitions for this item.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>When one or more workspace feeds have been defined for this workspace, select the Feed tab.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the Publish button on the Publish Feed Definition page.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the Cancel button on the Publish Feed Definition page.</td>
<td></td>
</tr>
<tr>
<td>Publish Feed Definition to Sites</td>
<td>PTPF_PUB_AS_SITES</td>
<td>Click the Publish Feed to Other Sites link on the Publish Feed Definition page.</td>
<td>Publish an existing feed to other sites.</td>
</tr>
<tr>
<td>Administration - Advanced</td>
<td>EPPCW_ADMIN_ADV</td>
<td>In the workspace menu, click the Administration link.</td>
<td>Access advanced utilities and tools for configuring the workspace.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Select the Advanced tab.</td>
<td></td>
</tr>
</tbody>
</table>

**Administering Workspace Properties**

Access the Administration - Properties page (in the workspace menu, click the Administration link).
Administration - Properties page

**Name**
The workspace name entered on the Name and Describe Workspace page appears, but can be overridden.

**Description**
The workspace description entered on the Name and Describe Workspace page appears, but can be overridden.

**Category**
The workspace category selected on the Name and Describe Workspace page appears, but can be overridden.
Click the Search Categories button to access the Select Category page, where you can select a category for the workspace.

**Valid From and Valid To**
Enter the span of dates during which you want the workspace to be valid.

**Welcome Text**
Enter text or HTML-formatted content that you want to appear as a welcome message on the Welcome pagelet.

Read Only  Select to make the workspace read-only. All members except the owner and administrators have viewer privileges only in this mode.

Workspace Parent  Select a workspace from the drop-down list box to make it the parent workspace. Select blank to make this workspace a root workspace.

Selecting a Workspace Category
Access the Select Category page (click the Search Categories button on the Administration - Properties page).

To select the category that you want to assign to the workspace:

1. Browse the category hierarchy to view the available categories:
   - Click + next to a category folder to expand it and reveal its contents.
   - Click – next to a category folder to collapse and hide its contents.
2. Click a link for a category to select that category for the workspace.

Administering Workspace Members
Access the Administration - Members page (in the workspace menu, click the Administration link; then select the Members tab).
Administration - Members page

**Adding Workspace Members**

**Send Invite**

Select to send a notification to the selected members alerting them that they have been added as a member to the workspace. The default notification text will be used and includes a link to the workspace homepage. Alternatively, you can send notifications after the workspace has been created, which also enables you to modify the notification text on the Set Invitation Message page.

See Chapter 4, "Administering Collaborative Workspaces," Sending Invitations to Workspace Members, page 77.

**Type**

Select the type of member that you want to add to the workspace. To be able to select Administrator or Owner in the Privilege Set field, you must select the User value here.

Available values include:

*Role*: Select to be able to select a role in the Member Name field. Available roles are derived from PeopleSoft roles defined on the Roles page.


*User*: Select to be able to select a user in the Member Name field. Available users are derived from PeopleSoft users defined on the User Profiles page.

**Member Name**  Select a name from the list of roles or users.

**Privilege Set**  Select a privilege level that you want to assign to the member. To be able to assign the Administrator or Owner privilege level to a member, you must have selected User in the Type field. Available values are:

- Administrator
- Approver
- Contributor
- Moderator
- Owner
- Viewer


**Add Workspace Member**  Click to add another member to the workspace.

**Create User Account**  Click to access the Create User Account page, which enables you to enter a new user name and email account for an external member.

*Note.* The Create User Account button appears only if the Enable External Users option has been set on the Installation Options page.


**Finish**  Click to finish workspace creation and access the workspace homepage.

**Sending Invitations to Workspace Members**

Access the Set Invitation Message page (select specific workspace members and click the Send Invitations button on the Administration - Members page).
**Creating an External User Account**

Access the Create User Account page (click the Create User Account button on the Administration - Members page).

Use the Create User Account page to create an account to allow an external user to access this workspace. The system user ID will be based on the email address that you enter. The name will be used as the description in the PeopleTools user profile. A dynamically created password will be mailed to the user enabling access to the workspace. When the external user signs in to the workspace for the first time, the Change Password page is displayed and he or she is asked to change the password that was sent in the invitation.
| **Email**       | **Enter a valid email address.**  
|                | The system user ID generated from this email address will be truncated at the @ sign. For example, an email address of first.last@xyz.com will result in a user ID of FIRST.LAST. |
| **Name**       | **Enter a description for this account.**  
|                | This will be used as the description in the PeopleTools user profile. |
| **Matching Accounts** | **After you enter a valid email address and exit the Email field, if a matching email address is found in the system, then the Matching Accounts group box appears displaying matching accounts.** |
| **Create Account** | **Click to create a new external user account and return to the Add Members (Optional) page.** |
| **Cancel**     | **Click either button to return to the Add Members (Optional) page without creating the external user account.** |

External user information can be accessed and managed from the Manage External User page.


**Administering Workspace Modules**

Access the Administration - Modules page (in the workspace menu, click the Administration link; then select the Modules tab).
The Modules group box displays module settings defined for the workspace on the Select Workspace Modules page, but can be overridden.

Select the modules that you want to include in the workspace. Welcome, Members, and Administration values are selected and unavailable for editing because those modules are required in a workspace. These are modules delivered with PeopleSoft Applications Portal.

You can choose to remove a module even after activity has been performed in the module without losing any data. Deselecting the Select option for a module simply removes link access to the module from the workspace menu; all module data is preserved. If you decide to include the module in the workspace again, all module activity that existed in the module before removal will be accessible.

The Properties link associated with a module enables you to further define the properties and options that are available in the module.

**Defining Documents Module Options for a Workspace**

Access the Documents Module Properties page (click the Properties link for the Documents module on the Administration - Modules page).
Documents Module Properties page

**Enable Content Versions**  
Select to enable different versions of content.

**Enable Content Checkout**  
Select to enable the check-in and checkout of documents posted to the Documents module of this workspace. If you select this option, fields and options enabling the check-in and checkout of documents appear appropriately on the pages used to post documents to the Documents module.

**Enable Content Approval**  
Select to enable the approval of documents posted to the Documents module of this workspace. If you select this option, fields and options enabling the approval of documents appear appropriately on the pages used to post documents to the Documents module.

**Cascade to All Child Folders**  
Sets the default approvals for all new content in child folders. The approval settings are transferred to all child folders when the page is saved. This setting does not affect existing child content approval settings.

**Enable Text/HTML**  
Select to enable the posting of text and HTML documents to the Documents module of this workspace. If you select this option, the Text or HTML option appears on the Documents - Add Documents page in the Documents module.

**Enable File Attachments**  
Select to enable the posting of file attachments to the Documents module of this workspace. If you select this option, the File Attachment option appears on the Documents - Add Documents page in the Documents module.

**Enable Managed Content**  
Select to enable the posting of managed content to the Documents module of this workspace. If you select this option, the Managed Content option appears on the Documents - Add Documents page in the Documents module.

*Adding or Editing a Related Pagelet in a Workspace*

Access the Add Pagelet page (click the Add Related Pagelet button on the Administration - Modules page).
Access the Edit Pagelet page (click the Edit Pagelet button for an existing pagelet on the Administration - Modules page).

Add Pagelet page

Use the Add Pagelet page to add an already defined pagelet to be available on the workspace homepage (Welcome tab) or the workspace Related Data tab.
Source Application

Select the portal registry that is the source of the pagelet definition.

To select the portal registry from the node of a content provider system, that node must already be defined as a source application.


Pagelet Folder

Select the portal folder that is the source of the pagelet definition.

Pagelet Name

Select the pagelet definition.

Pagelet Name

Displays the ID of the pagelet.

Pagelet Title

Displays the title of the pagelet, which you can modify.

Description

(Optional) Enter a description for the pagelet.

Pagelet Folder

Select the folder in which the pagelet definition will be stored. *PeopleSoft Applications* is the default folder for workspace pagelets.

Pagelet Security

Select a pagelet security option:

- *Publish as Public* — Select to designate that all users can access the pagelet.

- *Publish with Security Roles* — Select to use the already assigned role- or permission list-based security for the pagelet.

Author Access

Select to provide the pagelet author with access to the pagelet regardless of any security restrictions assigned to the pagelet. This access is granted based on the author's user ID.

Select

Select one or more workspace tabs for this pagelet:

- *Related Data* — The Related Data module.

- *Welcome* — The workspace homepage tab.
Pagelet Behavior

Select the default behavior for the pagelet:

- **Optional** — The pagelet will not appear on the workspace tab. Do not select this option.

- **Optional-Default** — The pagelet will appear on the workspace tab for all members. Only the administrator can modify the pagelet position. A member can remove the pagelet from his or her workspace homepage.

- **Required** — The pagelet will appear on the workspace tab for all members. The pagelet position can be modified by the administrator only.

- **Required-Fixed** — The pagelet will appear on the workspace tab for all members. The pagelet column can be modified by the administrator only; however, the pagelet will always appear at the top of the column.

Mapping Keys for Context-Sensitive Pagelets

Access the Key Name Mapping page (click the Map link for a context-sensitive pagelet on the Administration - Modules page).

![Key Name Mapping page](image_url)

When a related pagelet is added to a workspace and is designated as being context-sensitive, the pagelet is passed the same key names and values that are associated with the workspace. These keys are passed to the pagelet as query string parameters. If needed, the key names can be overridden for a related pagelet by means of the EPPCW_KEYMAPPING attribute to the content reference representing the pagelet.

The content reference for the pagelet content reference can be accessed by means of clicking the Structure and Content link on the Administration - Advanced page. The syntax for the attribute value is:

```
KEY1ORIGNAME=KEY1NEWNAME;
KEY2ORIGNAME=KEY2NEWNAME;
...  
KEYNORIGNAME=KEYNNEWNAME
```
See Also


Chapter 4, "Administering Collaborative Workspaces," Configuring Advanced Options for a Workspace, page 89

Administering Contextual Data

Access the Administration - Contextual Data page (in the workspace menu, click the Administration link; then select the Contextual Data page).

![Administration - Contextual Data page](image)

**Related Keys**

If this workspace was created by means of a template for which contextual data has been defined, the key fields selected to supply contextual data appear here. The key field values can be specified at the time of creation of the workspace or by using the Administration module of the workspace once it has been created.

If this workspace was created by means of a template that did not specify a contextual relationship, you can enter your own key fields and values.

While you can manually enter data on this page, Oracle recommends that you populate these fields by creating a workspace from a template and directly from a transaction.

**Note.** Modifying existing field values or options set in this group box initiates a function that updates all workspace pagelet content reference URLs that contain an attribute of `EPPCW_PAGELET` with a value of `KEYS`. This change affects all workspace pagelets, as well as any related pagelets associated with the workspace in which the key was modified.

- **Display**
  Select to display the contextual data in the workspace. If this option is selected, the key appears in the menu of the workspace.

- **Record Name**
  Select the record name that you want to use to derive contextual data for the workspace.
### Key
Enter the key field that you want to use to derive contextual data for the workspace.

### Custom Label
Enter an overriding value for the key label. If you choose to display the key, this label will appear alongside the key field value below the menu of a workspace for a transaction that contains the key.

## Administering Workspace Feeds

Use the Administration - Feeds page as the starting point for administering workspace feeds.

In addition to workspace modules that can be published as feeds on their own, one or more feeds can be published for the entire workspace, each of which is known as a *workspace feed*. While workspace members with sufficient privilege can publish feeds for individual workspace modules, only the workspace administrator can publish a workspace feed. In addition, the administrator is responsible for selecting which modules will be included in that feed.

The following steps provide a high-level overview of the process to administer workspace feeds:

1. In the workspace menu, click the Administration link to access the Administration module.

2. Select the Feeds page.

   Depending on whether a workspace feed has already been published, one of the following pages is displayed:

   - The Publish as Feed page is displayed if a workspace feed has already been published. Continue with step 3.
   - The Publish Feed Definition page is displayed if a workspace feed has not been published for this workspace. Continue with step 4.

3. Determine whether you want to edit one of the current workspace feeds, or create a new workspace feed.

   On the Publish as Feed page, click Edit to edit an existing workspace feed; click Add New to create a new workspace feed.

   *See Chapter 4, "Administering Collaborative Workspaces," Modifying and Saving Workspace Feed Definitions, page 87.*

4. Set the feed parameters, additional feed parameters, and feed security options on the Publish Feed Definition page.


5. You must select at least one module for publishing in this workspace feed. Therefore, click the Advanced Options link.

6. Set the advanced options for the workspace feed on the Advanced Feed Options page.

   *See Chapter 4, "Administering Collaborative Workspaces," Setting Advanced Options for Workspace Feeds, page 87.*
7. Click OK on the Advanced Feed Options page.

8. Click the Publish button on the Publish Feed Definition page to save any new or revised feed definitions.


**Modifying and Saving Workspace Feed Definitions**

Access the Publish as Feed page (click Publish on the Publish Feed Definition page; alternatively, if a workspace feed definition already exists, select the Feeds page in the Administration module).

<table>
<thead>
<tr>
<th>Feed Title</th>
<th>Published</th>
<th>Edit</th>
<th>Delete</th>
<th>Add Feed</th>
<th>Save</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wiki WS4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Publish as Feed page (Workspace Feeds)**

Use the Publish as Feed page for workspace feeds to administer and save workspace feed definitions.

- **Feed Title**: Click a link in this column to view the feed document for that workspace feed.
- **Published**: Indicates whether a workspace feed is currently published.
- **Edit**: Click to edit an existing workspace feed definition.
- **Delete**: Click to delete an existing workspace feed definition.
- **Add Feed**: Click to add a new workspace feed definition.
- **Save**: Click to save a new feed definition or changes to existing workspace feed definitions.

**Setting Advanced Options for Workspace Feeds**

Access the Advanced Feed Options page (click the Advanced Options link on the Publish Feed Definition page).
Use the Advanced Feed Options page for workspace feeds to determine which workspace modules will be included in the workspace feed. The workspace feed can be configured to include content from one or more of the following modules:

- Action Item Lists
- Blogs
- Calendar
- Discussions
- Documents
- Wiki Content

**Note.** A specific workspace module can be configured to be published in one or more or no workspace feeds.

To set advanced options for a workspace feed:

1. Set the maximum number of entries per module for this workspace feed in the Max Number of Entries field.
2. From the list of available workspace modules, select those modules that you want to publish in this workspace feed.

**Note.** If a module has not been selected on the Administration - Modules page, then it will appear as disabled on this page.

3. Click OK.
See Also


Configuring Advanced Options for a Workspace

Access the Administration - Advanced page (in the workspace menu, click the Administration link; select the Advanced tab).

![Administration - Advanced page](image)

Administration - Advanced page

**Navigation**

Access utilities and tools that enable you to implement advanced navigation configurations for the workspace.


**Pagelets**

Access utilities and tools that enable you to implement advanced pagelet configurations for the workspace.


**Branding**

Access utilities and tools that enable you to change the appearance of the portal.

Designating the Content and Layout of the Workspace Homepage

This section provides an overview of the content and layout of the workspace homepage and discusses how to:

- Modify the content of the workspace homepage.
- Modify the layout of the workspace homepage.

Understanding the Content and Layout of the Workspace Homepage

The workspace administrator or owner has the privileges necessary for maintaining the workspace homepage. Other workspace members have limited capabilities for customizing their workspace homepage, which is unlike their capabilities on the portal homepage. Specifically, other members cannot add or move pagelets and can only delete pagelets configured as Opt-Dflt (optional-default).

Note. Once a user has deleted a pagelet, it cannot be re-added easily to that user's homepage.

The Tab Content page is used to designate the pagelets that you want to appear on the workspace homepage. The Tab Layout page is used to modify the layout of pagelets on the homepage. The workspace administrator can also use the drag-and-drop feature to arrange the layout directly on the workspace homepage.

Pages Used to Designate the Content and Layout of the Workspace Homepage

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tab Content</td>
<td>PTSYSTABCONTENT</td>
<td>Click the Content link on the workspace homepage.</td>
<td>Designate the pagelets (types of content) that you want to display on the workspace homepage.</td>
</tr>
<tr>
<td>Tab Layout</td>
<td>PTSYSTABLAYOUT</td>
<td>Click the Layout link on the workspace homepage.</td>
<td>Designate the layout of content on the workspace homepage.</td>
</tr>
</tbody>
</table>

Modifying the Content of the Workspace Homepage

Access the Tab Content page (click the Content link on the workspace homepage).
Use the Tab Content page to designate the pagelets (types of content) that you want to display on the workspace homepage.

To select pagelets for the workspace homepage:

1. Select the check box for a pagelet to have it appear on the workspace homepage.

   Select the Include All? check box to select all available pagelets.
2. Use the drop-down list box to select the pagelet behavior:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Optional</td>
<td>The pagelet will not appear on the welcome page. Do not select this option.</td>
</tr>
<tr>
<td>Opt-Dflt (optional-default)</td>
<td>The pagelet will appear on the workspace homepage for all members. The pagelet position can be modified by the administrator only; the pagelet can also be removed by a member from his or her workspace homepage.</td>
</tr>
<tr>
<td>Required</td>
<td>The pagelet will appear on the workspace homepage for all members. The pagelet position can be modified by the administrator only.</td>
</tr>
<tr>
<td>Req-Fix (required-fixed)</td>
<td>The pagelet will appear on the workspace homepage for all members. The pagelet column can be modified by the administrator only; however, the pagelet will always appear at the top of the column.</td>
</tr>
</tbody>
</table>

3. Click the Save button.

**See Also**


### Modifying the Layout of the Workspace Homepage

Use either of these two methods to modify the layout of the workspace homepage:

- Move pagelets on the Tab Layout page.
- Drag and drop pagelets on the workspace homepage.

**Moving Pagelets on the Tab Layout Page**

Access the Tab Layout page (click the Layout link on the workspace homepage).
Tab Layout page

Use the Tab Layout page to designate the layout of content on the workspace homepage.

**Label**

Displays the name of this tab.

**Basic Layout**

Select to display the pagelets in either two or three columns on the workspace homepage.

To specify the three-column layout, be sure that at least one pagelet does not have the Req-Fix behavior option selected on the Tab Content page.

**Left Column, Center Column, and Right Column**

Displays the pagelets selected on the Tab Content page under the assigned column headings.

If the basic layout is two columns, the pagelets are divided into left and right columns. If the basic layout is three columns, the pagelets are divided into left, center, and right columns.

**Note.** A pound sign (#) indicates a pagelet with the Req-Fix behavior option selected on the Tab Content page. An asterisk (*) indicates a pagelet with the Required behavior option selected on the Tab Content page.

For example, #Menu indicates that the workspace menu pagelet cannot be moved to a different location on the homepage.
Use the Move Left, Move Up, Move Right, and Move Down buttons to position a pagelet.

Select a pagelet, and then click the directional arrow buttons to move the selected pagelet up in the list, down in the list, to the next column to the right, or to the next column to the left.

**Delete Pagelet**

Select a pagelet and then click Delete Pagelet to delete the pagelet from the workspace homepage.


**Dragging and Dropping Pagelets on the Workspace Homepage**

You can also rearrange pagelets on the workspace homepage by dragging and dropping them between columns.

To drag a pagelet, move the cursor over the pagelet title bar; the cursor changes shape to indicate that you can drag the pagelet. Click and drag the pagelet. When you are in the new location—signified by the color change—release the mouse button.

**Note.** You cannot move pagelets that you have configured as required-fixed.


---

**Managing the Status of Workspaces**

This section provides an overview of workspace statuses and discusses how to manage workspaces, including how to inactivate and delete workspaces.

**Understanding Workspace Statuses**

The Manage Workspaces component enables you to delete workspaces altogether. It also enables you to inactivate a workspace, which makes it unavailable for viewing and use by members, but keeps the data stored in your database. The component also enables you to reactivate inactive workspaces should you need to resume use of them.
Pages Used to Manage the Status of Workspaces

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Workspaces</td>
<td>EPPCW_MANAGE</td>
<td>Portal Administration, Workspaces, Manage Workspaces</td>
<td>Manage tasks on your workspaces, such as inactivating, activating, and deleting them.</td>
</tr>
<tr>
<td>Delete Confirmation</td>
<td>EPPCW_DEL_CONFIRM</td>
<td>Click the Delete button on the Manage Workspaces page.</td>
<td>Confirm your selected deletion.</td>
</tr>
</tbody>
</table>

Changing the Status of a Workspace

Access the Manage Workspaces page (select Portal Administration, Workspaces, Manage Workspaces).

Manage Workspaces

![Manage Workspaces page]

Manage Workspaces page
### Filter Workspaces

**Category**
Select the category in which you want to search for the workspace that you want to manage.

**Owner**
Select the owner of the workspace that you want to manage.

**Status**
Select the status of the workspace that you want to manage.
- *Active*
- *Inactive*

**Keyword**
Enter any keywords that you want to use to narrow your search results. The keywords that you enter will be matched with any text that appears in the title (label) or description of a workspace.

**Search**
Click to perform your requested search.

**Reset**
Click to clear all keywords that you have entered.

### Workspaces

**Select**
Select to indicate that you want to perform a managerial action on the workspace.

**Workspace**
Displays the name of the workspace. Click the link to access the workspace.

**Category**
The system displays the category to which the workspace is assigned.

**Owner**
The system displays the name of the workspace owner.

**Status**
The system displays whether the workspace is active or inactive.

**Activate**
Click to reactivate the selected workspace.

**Deactivate**
Click to deactivate the selected workspace. The workspace is no longer accessible or usable by its members, but its data continues to be stored in your database.

**Delete**
Click to delete the selected workspace. You are prompted to confirm your deletion.

---

### Moving a Workspace in the Workspace Hierarchy

You can move a workspace in the workspace hierarchy by specifying a new parent workspace on the Administration - Properties page.
Importing and Exporting Workspace Data

See the release notes for My Oracle Support for information about importing and exporting workspace data. See My Oracle Support, Knowledge, Portal Solutions, Applications Portal.

Managing External User Accounts for Workspaces

Access the Manage External Users page (select Portal Administration, Workspaces, Manage External Users).

Manage External Users page

You can search for external users based on the last sign-in date or by a keyword, such as user name.

The Users group box displays the user name, the description of the user, what workspaces the user can access, and when the user last signed in to that workspace.

To delete the external user from the system, select the name and click Delete.

To remove a user's external status and give them the status as an internal user, select the name and click Remove External Status.
Chapter 5

Working in Collaborative Workspaces

This chapter discusses how to:

- Access workspaces.
- Navigate in a workspace.
- Modify your workspace homepage.
- Use the Wiki Content module.
- Use the Discussions module.
- Use the Documents module.
- Use the Blogs module.
- Use the Links module.
- Use the Action Item Lists module.
- Use the Calendar module.
- Use the Members module.
- Use the Related Data module.
- Use the Polls module.
- Use the Browse Workspaces module.
- Search within workspaces.
- View and Subscribe to feeds within a workspace.
- Create and use tags in workspaces.
- Work with additional workspace pagelets.

Accessing Workspaces

This section provides an overview of how to access workspaces and discusses how to:

- Work with the My Workspaces pagelet.
- Search for workspaces.
• Browse the workspace hierarchy.
• Browse workspaces by category.
• Request access to a workspace.

Understanding How to Access Workspaces

Oracle's PeopleSoft Applications Portal provides several tools to facilitate access to workspaces:

• My Workspaces pagelet
  Use the My Workspaces pagelet to access the workspaces to which you already belong.

• Workspaces - Search page
  Use the Workspaces - Search page to specify criteria to search for workspaces. The search results show workspaces to which you already belong.

• Workspaces - Hierarchy page
  Use the Workspaces - Hierarchy page to traverse the entire hierarchy of all workspaces, including workspaces to which you do not belong. From this page, you can select a workspace and then navigate to that workspace or create a child workspace if you have workspace creation privileges. In addition, from this page, you can request membership to a workspace to which you do not belong.

• Browse By Category page
  Use the Browse By Category page to browse by category through workspaces. The workspaces displayed are those to which you already belong.

In addition, if you are not a member of a specific workspace, you will be presented with an opportunity to request membership when you attempt to access that workspace.

The Workspaces - Search page, Workspaces - Hierarchy page, and Browse By Category page are available from the portal homepage and in the Browse Workspaces module of each workspace.

Pages Used to Access Workspaces

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personalize My Workspaces</td>
<td>PTPPB_USER_PREF</td>
<td>Click the Customize button on the My Workspaces pagelet.</td>
<td>Specify the number of workspaces to display in the pagelet.</td>
</tr>
<tr>
<td>Page Name</td>
<td>Definition Name</td>
<td>Navigation</td>
<td>Usage</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Workspaces - Search</td>
<td>EPPCW_MYWS</td>
<td>• Browse Workspaces</td>
<td>Specify criteria to search for workspaces of which you are already a member.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the Browse Workspaces link in the workspace menu.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the View All Workspaces link in the My Workspaces pagelet.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the View All Workspaces link in the Related Workspaces pagelet.</td>
<td></td>
</tr>
<tr>
<td>Workspaces - Hierarchy</td>
<td>EPPCW_HIER_SPACES</td>
<td>Select the Hierarchy page from the Workspaces - Search page.</td>
<td>Traverse the entire workspace hierarchy including workspaces of which you are not a member.</td>
</tr>
<tr>
<td>Browse By Category</td>
<td>EPPCW_BROWSE</td>
<td>Click the Browse By Category button on the Workspaces - Search page.</td>
<td>Browse by category through workspaces of which you are a already member.</td>
</tr>
<tr>
<td>Workspace Invitation</td>
<td>EPPCW_MBR_REQUEST</td>
<td>Select a workspace on the Workspaces - Hierarchy page.</td>
<td>Send a membership request to the workspace administrator.</td>
</tr>
<tr>
<td>Workspace Security Error</td>
<td>EPPCW_SECURITY_ERR</td>
<td>Access workspace content or a workspace URL to which you do not have access permission.</td>
<td>Send a membership request to the workspace administrator.</td>
</tr>
<tr>
<td>Select Category</td>
<td>EPPCW_CATG_SELECT</td>
<td>Click the Search Categories button on the Workspaces - Search page.</td>
<td>Select the category to enter as search criteria.</td>
</tr>
</tbody>
</table>

**Working with the My Workspaces Pagelet**

This section discusses how to:

- Personalize the My Workspaces pagelet.
- Use the My Workspaces pagelet.

**Personalizing the My Workspaces Pagelet**

Access the Personalize My Workspaces page (click the Customize button on the My Workspaces pagelet).
**Personalize My Workspaces**

Select from the available option(s) to personalize the display of this pagelet.

*Max Rows: 20*

- [Reset to Defaults](#)

**Personalize My Workspaces page**

Use the Personalize My Workspaces page to specify the number of workspaces to display in the My Workspaces pagelet.

**Max Rows**

Specify the maximum number of workspaces to display in the My Workspaces pagelet.

**Note.** Specifying 0, display all rows up to the maximum row allowed in Query security profiles.

- [Reset to Defaults](#)

**Using the My Workspaces Pagelet**

Access the My Workspaces pagelet on the portal homepage.

**My Workspaces**

Wiki WS
Demo 2
Demo Workspace
WS3

[View All Workspaces]
[Create Workspace]

My Workspaces pagelet

Use the My Workspaces pagelet to access to the workspaces to which you belong. The My Workspaces pagelet also provides access to several workspace-related tasks.

- [workspace name] Click to access the homepage of the workspace.
View All Workspaces

Click to access the Search - Workspaces page, where you can search for workspaces.


Create Workspace

If you have been given workspace creation privileges, click to access the Select A Workspace Template page, where you can begin creating a workspace.


Searching for Workspaces

Access the Workspaces - Search page (Browse Workspaces).

![Workspaces - Search page](image)

Use the Workspaces - Search page to specify criteria to search for workspaces. The search results show workspaces to which you already belong.
Workspace Name
Enter a complete or partial name on which to search. The search text is not case-sensitive.

For example, searching on the string ba would return workspaces named BASE1, Bavarian Motor Works, and Barry's Workspace.

Category
Select the workspace category on which to search.

Click the Search Categories button to view the category hierarchy.

See Chapter 4, "Administering Collaborative Workspaces," Selecting a Workspace Category, page 75.

Owner
Select the owner on which to search.

The Owner field appears when you click the Advanced Options link.

Template
Select the template on which to search.

The Template field appears when you click the Advanced Options link.

Search
Click to carry out the workspace search based on the criteria entered.

Advanced Search and Basic Search
Click to toggle between the advanced and basic search criteria.

Name
Click a workspace name in the Search Results grid to navigate to the homepage of the workspace.

Browse By Category
Click to access the Browse By Category page.


Create Workspace
Click to access the workspace creation wizard, which you can use to create a root-level workspace.


Browsing the Workspace Hierarchy
Access the Workspaces - Hierarchy page (select the Hierarchy page from the Workspaces - Search page).
Use the Workspaces - Hierarchy page to traverse the entire hierarchy of all workspaces, including workspaces to which you do not belong. From this page, you can select a workspace and then navigate to that workspace or create a child workspace if you have workspace creation privileges. In the hierarchy view, a folder represents a parent workspace that has children. In addition, from this page, you can request membership to a workspace to which you do not belong.

**Left and Right**
Click to move the area displayed to the left or right one level.

**Expand All and Collapse All**
Click to toggle between all parent workspaces fully expanded or fully collapsed.

**<workspace name>**
Click the link for a workspace name to perform one of the following actions:
- Navigate directly to the homepage of the selected workspace if you do not have workspace creation privileges.
- Highlight that workspace and reveal the Create Child Workspace and Go to workspace buttons if you do have workspace creation privileges.

The selected workspace is highlighted in yellow.

**Note. When viewing the workspace hierarchy through the Browse Workspaces module of a workspace, the Go to workspace button is not displayed for that specific workspace.**

 Indicates a workspace that does not have any children.

 Click the Expand Folder button to expand that parent workspace to reveal its children.

 Click the Collapse Folder button to collapse that parent workspace and hide its children.
Click the Create Child Workspace button to create a child workspace with the highlighted workspace as its parent.


Click the Go to *workspace name* button to navigate to the homepage of the highlighted workspace.

See Also

Chapter 5, "Working in Collaborative Workspaces," Requesting Access to a Workspace, page 107

Browsing Workspaces by Category

Access the Browse By Category page (click the Browse By Category button on the Workspaces - Search page).

![Browse By Category](image)

Browse By Category page

Use the Browse By Category page to browse by category through workspaces. The workspaces displayed are those to which you already belong.

**Workspace/Category**

Click to access the particular workspace.

Designates a category folder.

Click a category link to access the contents of the category.
Designates a workspace in the category hierarchy. Click a workspace link to access the workspace.

**Requesting Access to a Workspace**

This section discusses how to:

- Request membership to a workspace.
- Request membership when you receive a workspace security error.

**Requesting Membership to a Workspace**

Access the Workspace Invitation page (select a workspace for which you do not have access on the Workspaces - Hierarchy page).

### Workspace Invitation

You do not have access to this collaborative workspace. You may contact a workspace administrator listed below to request access to the workspace.

- Send Invitation
- Vice President of Finance

**Email**

- _Subject:_ Request for membership to workspace WIKIWS3
- _Message:_ User ID: PS

**Send**

Use the Workspace Invitation page to send a membership request to the workspace administrator.

- **Send Invitation**
  - Select the administrator or administrators to whom you want to send the request.

- **Subject**
  - Enter the subject of the message or accept the default text.

- **Message**
  - Enter the body of the message or accept the default text.

- **Send**
  - Click to send the request and return to the Workspaces - Hierarchy page.
Cancel  Click to cancel and return to the Workspaces - Hierarchy page without sending the request.

**Requesting Membership When You Receive a Workspace Security Error**

Access the Workspace Security Error page (access workspace content or a workspace URL to which you do not have access permission).

![Workspace Security Error page](image)

**Workspace Security Error**

You do not have access to this collaborative workspace. You may contact a workspace administrator listed below to request access to the workspace.

- Unger, Annette
- Vice President of Finance

**Email**

- **Subject:** Request for membership to workspace Sibling3
- **Message:** User ID: PS

**Send**  Click to send the request.

**Return to Home**  Click to return to portal homepage.
Navigating in a Workspace

When you access a workspace, the workspace homepage appears. The workspace homepage is the front page and standard entry area for a workspace.

The workspace administrator can configure the workspace homepage to display pagelets relevant to the content of the workspace, including pagelets associated with each workspace module. The workspace homepage displays the modules selected for the workspace in the menu on the left and pagelets selected for the workspace homepage in selected columns as shown in the following example of a three-column homepage:
Workspace homepage

The name of the workspace appears in the workspace header and also at the top of the workspace menu. This name was defined when the workspace was created, but can be edited in the Administration module. Any contextual relationship that was defined for the workspace appears as a link at the bottom of the menu. If applicable, select the Return to link to access the transaction for which the workspace was created.

The following elements appear in the workspace header:

- **Portal Home**  
  Click to exit the workspace and access the PeopleSoft Applications Portal homepage.

- **Sign out**  
  Click to sign out of the PeopleSoft system.

- **<Workspace Name>**  
  Click to access the workspace homepage.
Move your mouse cursor over any of these icons to view the list of feeds published as workspace feeds. Click any list item to open that feed document.

Click the Feed button or Feed link to open the first feed document in the list.

Click the Open menu button to toggle the list of feeds between frozen open and closed.

**Search**

Click and enter a search phrase in the Search field.

Click to perform a search within the workspace.

Alternatively, press Enter after entering a search phrase in the Search field.


**Content**

Click to access the Tab Content page. This link appears only for users who have been designated as workspace owners or administrators.

See Chapter 4, "Administering Collaborative Workspaces," Modifying the Content of the Workspace Homepage, page 90.

**Layout**

Click to access the Tab Layout page. This link appears only for users who have been designated as workspace owners or administrators.

See Chapter 4, "Administering Collaborative Workspaces," Modifying the Layout of the Workspace Homepage, page 92.

The following links can appear in the workspace menu and depend on the modules selected by the workspace administrator:

**Note.** The Administration link appears only for members designated as administrators for this workspace.

**Welcome**

Click to access the workspace homepage. This link typically does not appear for workspaces configured with the Wiki Content module.

**Wiki Content**

Click to access the Wiki Content module.

**Note.** The Wiki Content link in the workspace menu is not shown in the preceding example.

Use the Wiki Content module to collaboratively author wiki content for the workspace. The Wiki Content module provides features such as version control and multilanguage support that allow continuous and collaborative refinement of the content. The rich text editor is used to edit the wiki content, which also appears in the Wiki Content pagelet.

Discussions

Click to access the Discussions module.

Use the Discussions module to participate in discussions that are relevant to the collaborative workspace. The Discussions module enables workspace members to post discussion topics and replies, and provides the complete history of interaction on a topic. Members can also monitor recent discussion postings using the Recent Discussions pagelet that appears on the workspace homepage.


Documents

Click to access the Documents module.

Use the Documents module to publish, optionally approve, and view shared documents that are relevant to a workspace. Members can monitor recent document postings using the Recent Documents pagelet that appears on the workspace homepage.


Blogs

Click to access the Blogs module.

Use the Blogs module to participate in the blog for the workspace. The Blogs module enables workspace members to create news and multithreaded commentary on topics that are relevant to the workspace. Members can also monitor recent blog postings using the Blogs pagelet that appears on the workspace homepage.


Links

Click to access the Links module.

Use the Links module to create a collection of links that are relevant to the workspace. This collection appears in the Links pagelet, which appears on the workspace homepage.


Action Item Lists

Click to access the Action Item Lists module.

Use the Action Item Lists module to maintain action item lists and action items defining responsibilities for individual workspace members. Members can also monitor current action items using the Open Action Items pagelet, which appears on the workspace homepage.

Calendar
Click to access the Calendar module.
Use the Calendar module to maintain the workspace calendar and events to coordinate the activities of the workspace team. Members can also monitor current events using the Upcoming Events and Calendar pagelets, which appear on the workspace homepage.

Members
Click to access the Members module.
Use the Members module to get information about and communicate with workspace members. The Members module provides access to member profiles, as well as links to initiate email and instant messaging with members. The Members module is required in all workspaces.

Related Data
Click to access the Related Data module.
Use the Related Data module to access a collection of pagelets that are relevant to the workspace. This collection of pagelets is compiled by the workspace administrator.

Polls
Click to access the Polls module.
Use the Polls module to create questions for the workspace poll. Members can respond to the poll and monitor poll results using the Poll pagelet which appears on the workspace homepage.

Browse Workspaces
Click to access the Browse Workspaces module.
Use the Browse Workspaces module to browse the workspace hierarchy or search to find other workspaces. You can create new workspaces or child workspaces in this module.
Administration

Note. The Administration link appears only for members who are designated as administrators for this workspace.

Click to access the Administration module for the workspace.

The workspace administrator can use the Administration module to define workspace properties, manage workspace membership and security, select workspace modules, define contextual data relationships, and further customize the workspace. The Administration module is required in all workspaces.


Return to <Transaction Name>

If the workspace is related to a transaction, click this link to access the transaction page.

Modifying Your Workspace Homepage

Unlike your portal homepage, you have limited capabilities for modifying a workspace homepage. The workspace administrator or owner designates the content and layout of the workspace homepage. As a workspace member, you can delete only pagelets that are configured as Opt-Dflt (optional-default). Pagelets that can be deleted display a Remove button:

[X] Click to remove a pagelet from the workspace homepage.

Important! Once you have deleted a pagelet, it cannot be re-added easily to your workspace homepage.

See Also

Chapter 4, "Administering Collaborative Workspaces," Designating the Content and Layout of the Workspace Homepage, page 90

Using the Wiki Content Module

This section provides an overview of the Wiki Content module and discusses how to:

• Edit the content.
• View the content.
• Review content information.
• Work with the Wiki Content pagelet.
Understanding the Wiki Content Module

The Wiki Content module provides a platform that workspace members can use to maintain wiki content for the workspace. The Wiki Content module is essentially a wiki page that enables workspace members to collaboratively author and continually revise content using the built-in rich text editor. Similar to other wiki pages, the Wiki Content module provides revision control. In addition, the rich text editor includes a Link dialog box that enables you to create and maintain links to PeopleSoft content that resides elsewhere in your PeopleSoft Applications Portal system.

This wiki content is displayed in the Wiki Content pagelet on the workspace homepage, which provides a more collaboration-rich alternative to the Welcome pagelet.


This table provides a comparison of features that are available with the Wiki Content module and the Welcome pagelet:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Wiki Content</th>
<th>Welcome Pagelet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rich text editor</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Collaborative authoring</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Administrator authored</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>Links to PeopleSoft content</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Links to external URLs</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>Version history</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Version comparison</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Email notification</td>
<td>Y</td>
<td>N</td>
</tr>
</tbody>
</table>

This section also includes an overview of revision control.

Understanding Revision Control

The revision control features of the Wiki Content module enable you to:

- View version history and previous versions.
- Compare any two versions.
- Delete a version.
- Restore a version to be the current version.

### Pages Used with the Wiki Content Module

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
<td>EPPWI_WIKI_PAGE</td>
<td>• In the workspace menu, click the Wiki Content link.</td>
<td>Edit and format the wiki content.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• In the Wiki Content pagelet, click the Edit Content link.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• In the Wiki Content module, select the Edit page.</td>
<td></td>
</tr>
<tr>
<td>Email Notifications</td>
<td>EPPWI_EVENT_NOTIFY</td>
<td>Click the Notify button on the Edit page.</td>
<td>Send an ad hoc email notification regarding wiki content to selected workspace members.</td>
</tr>
<tr>
<td>View</td>
<td>EPPWI_VIEW_PAGE</td>
<td>• In the Wiki Content module, select the View page.</td>
<td>Preview the wiki content as it will appear in the Wiki Content pagelet.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the Save button on the Edit page.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the link for a specific version on the Information page.</td>
<td></td>
</tr>
<tr>
<td>Information</td>
<td>EPPWI_PAGE_INFO</td>
<td>In the Wiki Content module, select the Information page.</td>
<td>Review the list of wiki content versions.</td>
</tr>
<tr>
<td>Compare Versions</td>
<td>EPPWI_PAGE_DIFF</td>
<td>Select two versions and click the Compare Versions button on the Information page.</td>
<td>Compare the differences between two wiki content versions.</td>
</tr>
</tbody>
</table>

### Editing the Content

Access the Edit page (in the workspace menu, click the Wiki Content link).
Edit page (Wiki Content module)

Use the Edit page to edit the wiki content.

**rich text editor**

The rich text editor provides tools for editing and formatting your wiki content. The Link dialog box is described in more detail in this section.

The basic functions and configuration of the rich text editor are described in detail in the PeopleTools PeopleBooks.


Click the Link button to open the Link dialog box. This dialog box enables you to create links to other content within the PeopleSoft Applications Portal system or to external URLs.


**Save**
Click to save the wiki content as a new version.
The View page is displayed after a save.

**Cancel**
Click to exit the Edit page without saving your changes.
The View page is displayed after you cancel your edits.

**Notify**
Click to send an ad hoc email notification regarding wiki content to selected workspace members.

### Adding Links to Content
Access the Link dialog box (click the Link button in the rich text editor toolbar on the Edit page).
Link dialog box: Link Info tab

Use the Link Info tab of the Link dialog box to specify the destination and characteristics of links. The Link dialog box enables you to create links to external URLs as well as links to the following PeopleSoft Applications Portal content types:

- Attachments: Any content stored within the Documents module of the current workspace.
- Discussions: Any discussion topic from forums within the portal and other workspaces.
- Blogs: Any blog post from blogs within the portal and other workspaces.
- Workspaces: Any active workspace in the PeopleSoft Applications Portal system.

**Link**

Enter the complete URL for an external link—for example, http://www.oracle.com/applications/portals/enterprise/enterprise-portal.html. Otherwise, this field is automatically populated with the link name when PeopleSoft content has been selected.

**Alias**

Enter the text that will appear in your wiki content as the underlined link. If you selected text prior to clicking the Link dialog box, do not enter any text here; you will overwrite the existing text.
Tooltip

Enter the hover text to appear as a tool tip when the mouse cursor is moved over the link.

Content Type

Select one of the following content types:

- **Attachments** — Any content stored within the Documents module of the current workspace.

  Enter search text to search for specific content.

- **Discussions** — Any discussion topic from forums within the portal and other workspaces.

  Enter search text to search for specific discussion forums or topics.

- **Blogs** — Any blog post from blogs within the portal and other workspaces.

  Enter search text to search for specific blogs or posts.

- **Workspaces** — Any active workspace in the PeopleSoft Enterprise Portal system.

  Enter search text to search for specific workspaces and limit the search by selecting one of the following scopes:

  - **All Workspaces**
  
  - **The selected root workspace**
  
  - **The selected workspace category**

- **External URL** — Any complete URL.

search text

Enter the search text.

Search

Click to perform the search.

Name, Forum, Blog, and Workspace

Click to select an item as the target of the link.

Topic and Post

Click to select an item as the target of the link.

Author and Creator

Indicates the author for documents, discussion topics, and blog posts, and the workspace creator.

Last Updated

Indicates the last updated date and time for the item.

1, 2, and ...

Click to go to a specific page of search results.

Access the Target tab (select Target in the Link dialog box).
Link dialog box: Target tab

Use the Target tab of the Link dialog box to specify the link behavior.

**Target**

Select one of the following targets:

- `<not set>`
- `New Window (_blank)`
- `Topmost Window (_top)`
- `Same Window (_self)`
- `Parent Window (_parent)`

**Target Frame Name**

When a target is selected, this field is automatically populated with the name of the target frame.

**Sending Email Notifications**

Access the Email Notifications page (click the Notify button on the Edit page).
Email Notifications page (Wiki Content module)

Use the Email Notifications page to send an ad hoc email message regarding wiki content to selected workspace members.

**All Workspace Members, Workspace Owner, and Me**
Click to select the workspace members whom you want to receive the message.
Selecting any of these options and clicking the Add Selected to Email button will populate the Email To field with the email addresses for the corresponding users from their PeopleSoft system profiles.

**Add Selected to Email**
Click to add email addresses for the selected workspace members to the Email To field.
Additionally, you can manually enter email addresses in the Email To, Cc, and Bcc fields.

**Email To**
Enter the email addresses for individuals whom you want to receive the email message.
Separate addresses with a comma.
Cc Enter the email addresses for individuals whom you want to receive the email message as a carbon copy. Separate addresses with a comma.

Bcc Enter the email addresses for individuals whom you want to receive the email message as a blind carbon copy. Separate addresses with a comma.

Email Subject Enter the text for the subject of the email message.

Message Text Enter the text of the message in this text box. The text appears in the email message along with a URL to the Wiki Content module.

Send Click to send the email notification.

Cancel Click to cancel sending the email notification.

Viewing the Content

Access the View page (select View in the Wiki Content module).

View page (Wiki Content module)

Use the View page to preview the wiki content as it will appear in the Wiki Content module.
Reviewing Content Information

This section discusses how to:

- Review version information.
- Delete a version.
- Restore a version to be the current version.
- Compare versions.

Reviewing Version Information

Access the Information page (select Information in the Wiki Content module).

![Information page (Wiki Content module)](image)

Use the Information page to review wiki content versions. On this page, you can compare versions, view a specific version, delete a version, and restore a version as the current version.

- **Wiki Page Name**: Displays the name of the wiki page, which is equivalent to the name of the workspace as stored in the portal definition table.
- **Created Datetime**: Displays the date and time that the wiki page was created, which is equivalent to the date and time that the workspace was created.
- **Created By**: Displays a link to the profile of the user who created the wiki page, which is the ID of the user who created the workspace.
- **Version**: Displays the version number.
**Compare Versions**
Select two and only two versions for comparison. Then, click the Compare Versions button.

**Date Last Modified**
Click a link in this column to display that version on the View page.

**Updated By User**
Displays the user ID of the person who created the version.

**Comment**
Displays the comment for the version.

**Delete**
Click to delete a version.

**Restore Version**
Click a link in this column to restore that version to be the current version.

**Important!** No confirmation of your choice to restore a version appears.

**Compare Versions**
Select two and only two versions, then click this button to compare the versions.

**Deleting a Version**
Click the Delete button on the Information page to delete a specific version.

**Restore a Version to Be the Current Version**
Click the Restore Version link on the Information page to restore a version to be the current version.

**Important!** No confirmation of your choice to restore a version appears.

**Comparing Versions**
Access the Compare Versions page (select two versions and click Compare Versions on the Information page).
California-based Auto Parts Place is an online retailer of all domestic and import auto parts that caters to customers in the United States. It has maintained its reputation as a major player in the automotive aftermarket parts industry. With its online store, it possesses budget pricing for car parts and accessories, as well as OEM, aftermarket, and rebuilt parts. It is also a member of the Better Business Bureau.

Market Status: Auto Parts Place is affiliated with several import and domestic auto parts suppliers whose merchandise company relies on the World Wide Web in the marketing, distribution, and sale of its products. Use of the said technology will result in the following:

- Up-to-date cataloging of car parts on stock
- Direct warehouse to consumer shipping
- Fast inventory of auto parts
- Overnight or second day shipping options
- 24/7 Live online support available all over the world

Product Line: The company supports auto parts and accessories for the following car lines (listed in order): GMC, Suzuki, Pontiac, Acura, Porsche, Lexus, Land Rover, Mercury, Buick, Cadillac, Plymouth, Nissan, Geo, Ferrari, Chevrolet, Kia, BMW, Infiniti, Lincoln, Saturn, Isuzu, Rover, Toyota, Renault, Saab, Eagle, Mercedes-Benz, Mazda, Jeep, Dodge, Audi, Ford, Chrysler, Oldsmobile.

The online store currently offers products from 554 different part manufacturers both import and domestic. Major suppliers include: ACDelco, Bilstein, Wagner, Delphi, Cardone, Fram, Dorman, Moog, and more.

Compare Versions page (Wiki Content module)

Use the Compare Versions page to compare the differences between two versions of the wiki content. Text that appeared in the older version but not in the newer version appears stricken through and highlighted in red. Text that appears in the newer version but not in the older version appears underlined and highlighted in green.

**Working With the Wiki Content Pagelet**

Access the Wiki Content pagelet on the workspace homepage.
Wiki Content pagelet

Use the Wiki Content pagelet to view and edit the wiki content.

Edit Content Click to access the Edit page of the Wiki Content module.

Using the Discussions Module

This section provides an overview of the Discussions module and discusses how to use the Recent Discussions pagelet.

Understanding the Discussions Module

The Discussions module provides a platform that workspace members can use to discuss topics of interest. The discussion can be configured as moderated or unmoderated, and members can post discussion topics and replies. Members can monitor current topics using the Recent Discussions pagelet on the workspace homepage. Discussion updates that were posted most recently to the Discussions module are displayed for member access on the Recent Discussions pagelet, which appears by default on the workspace homepage.
In addition, the Discussion Posts pagelet provides information from all workspace discussions to which a workspace member has access. Members can add this pagelet to homepage tabs, dashboard pages, or WorkCenter pages.


The pages used to participate in discussions in the Discussions module are the same pages used for the Discussion Forums feature that is available from the PeopleSoft Applications Portal homepage. When you click the Discussions link in the workspace menu, you access the Discussion Forum page, which functions the same way as the Discussion Forum page functions in the portal. The Discussion Forum feature is documented in the *PeopleSoft Applications Portal 9.1 PeopleBook: Using Portal Features*.

See *PeopleSoft Applications Portal 9.1 PeopleBook: Using Portal Features*, "Working With Discussion Forums."

In addition, if a workspace is linked to a transaction or transaction instance that has been configured to use the Discussions related content service, a Related Discussions pagelet is automatically added to the Related Data module of the workspace. The Related Discussions pagelet displays discussion topics that have been posted to the transaction or transaction instance.

**See Also**

Chapter 5, "Working in Collaborative Workspaces." Using the Related Discussions Pagelet, page 152

---

**Using the Recent Discussions Pagelet**

Access the Recent Discussions pagelet on the workspace homepage.
Recent Discussions pagelet

Use the Recent Discussions pagelet to review topics and replies that were recently posted in the Discussions module. The pagelet also includes other convenient links and options for using the Discussions module.

**Recent Posts**
Click a link in the Recent Posts column to view the Post Details page for that post.

**View All Discussions**
Click to access the Discussion Forum page of the Discussions module.

**Feed**
Move your mouse cursor over any of these to view the list of feeds published for the Discussions module of the workspace. Click any list item to open that feed document.

Click the Feed button or Feed link to open the first feed document in the list.

Click the Open menu button to toggle the list of feeds between frozen open and closed.

**Add Topic**
Click to access the Create New Topic page in the Discussions module.
Using the Documents Module

This section provides an overview of the Documents module and discusses how to use the Recent Documents pagelet.

Understanding the Documents Module

The Documents module provides a platform that workspace members can use to share documents of interest. In addition, members can monitor recently posted documents using the Recent Documents pagelet on the workspace homepage.

The pages used to manage folders and documents in the Documents module are the same pages used in the content management system that is available from the PeopleSoft Applications Portal homepage. When you click the Documents link in the workspace menu, you access the Documents page, which functions similarly to the way the Browse Managed Content pages function in the content management system. The content management system is documented in the PeopleSoft Applications Portal 9.1 PeopleBook: Content Management System.

See PeopleSoft Applications Portal 9.1 PeopleBook: Content Management System, "Setting Up and Working With Managed Content."

Working With the Recent Documents Pagelet

Access the Recent Documents pagelet from the workspace homepage.

<table>
<thead>
<tr>
<th>Date</th>
<th>Title</th>
<th>Author</th>
<th>Properties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb 06</td>
<td>Shuttle Schedule</td>
<td></td>
<td>Properties</td>
</tr>
<tr>
<td>Jan 17</td>
<td>New Headquarters Construction Update</td>
<td></td>
<td>Properties</td>
</tr>
<tr>
<td>Jan 16</td>
<td>Facilities Service Desk</td>
<td></td>
<td>Properties</td>
</tr>
<tr>
<td>Jan 16</td>
<td>Office Information</td>
<td></td>
<td>Properties</td>
</tr>
<tr>
<td>Jan 16</td>
<td>Office Services</td>
<td></td>
<td>Properties</td>
</tr>
<tr>
<td>Jan 16</td>
<td>Transportation Info</td>
<td></td>
<td>Properties</td>
</tr>
</tbody>
</table>

Recent Documents pagelet

Use the Recent Documents pagelet to review content recently posted in the Documents module. The pagelet also includes other convenient links and options for using the Documents module.

Title

Click a link in the Title column to view the document.

Properties

Click a link in the Properties column to view the Properties page for the document.
### View All Documents
Click to access the top folder of the Documents module.

### Feed
Move your mouse cursor over any of these icons to view the list of feeds published for the Documents module of the workspace. Click any list item to open that feed document.

Click the Feed button or Feed link to open the first feed document in the list.

Click the Open menu button to toggle the list of feeds between frozen open and closed.

### Add Document
Click to access the Add Document page to add a document to the top folder in the Documents module.

---

**Using the Blogs Module**

This section provides an overview of the Blogs module and discusses how to use the Blogs pagelet.

**Understanding the Blogs Module**

The Blogs module provides a platform that workspace members can use to blog on topics of interest. Members can post blog entries and comments. In addition, members can monitor current entries using the Blogs pagelet on the workspace homepage. The most recently added blogs and comments in the Blogs module are displayed for member access on the Blogs pagelet, which appears by default on the workspace homepage.

The pages used to participate in blogging in the Blogs module are the same pages used for the Blogs feature that is available from the PeopleSoft Applications Portal homepage. When you click the Blogs link in the workspace menu, you access the blog page, which functions the same way as the blog page functions in the portal. The Blogs feature is documented in the *PeopleSoft Applications Portal 9.1 PeopleBook: Using Portal Features*.

See *PeopleSoft Applications Portal 9.1 PeopleBook: Using Portal Features*, "Working With Blogs."

**Working With the Blogs Pagelet**

Access the Blogs pagelet on the workspace homepage.
Blogs pagelet

Use the Blogs pagelet to review blog entries and comments that were recently posted in the Blogs module. The pagelet also includes other convenient links and options for using the Blogs module.

- Click the Add New Post button to access the Create New Post page for the Blogs module.
- Click the workspace name to access the Blogs page for the Blogs module.
- Click a link for a blog post or comment to access the View Blog Comments page for that post.
- Click to access the Manage Blog page for the workspace blog.
- Click to access the Search Workspaces page.

Move your mouse cursor over any of these icons to view the list of feeds published for the Blogs module of the workspace. Click any list item to open that feed document.

Click the Feed button or Feed link to open the first feed document in the list.

Click the Open menu button to toggle the list of feeds between frozen open and closed.

Using the Links Module

This section provides an overview of the Links module and discusses how to:

- Maintain links and folders.
- Add a link.
- Add a folder.
- Access folder contents.
- Work with the Links pagelet.
Understanding the Links Module

Use the Links module to build and maintain a collection of useful links that are related to a workspace. This collection of links is displayed for member use on the Links pagelet, which appears by default on the workspace homepage.

You can include links to the following types of content:

- External URLs.
- PeopleSoft menu items.

If you define a Link pagelet collection as a part of a workspace template, the collection will appear in the Link pagelet in any workspaces built by means of the template.

Pages Used in the Links Module

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Links</td>
<td>EPPCW_LKBROWSE</td>
<td>In the workspace menu, click the Links link.</td>
<td>Add, edit, and delete folders and links in the Links module.</td>
</tr>
<tr>
<td>Link Properties</td>
<td>EPPCW_LKLINK</td>
<td>• Click the Add Link button on the Links page.</td>
<td>Add and maintain links in the Links module.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Click the Properties link for a link on the Links page.</td>
<td></td>
</tr>
<tr>
<td>Search Links</td>
<td>EPPCW_ADD_LINK</td>
<td>• Select Portal Blog as the link type and click the Click to Search Blogs link.</td>
<td>Search for blog posts, discussion topics, or workspaces to which to link.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Select Portal Discussions as the link type and click the Click to Search Discussions link.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Select Workspace as the link type and click the Click to Search Workspace link.</td>
<td></td>
</tr>
<tr>
<td>Key Name Mapping</td>
<td>EPPCW_LKKEYMAP</td>
<td>Click the Map Keys link on the Link Properties page.</td>
<td>Select the keys that you want to pass to the link and provide optional new names for these keys.</td>
</tr>
</tbody>
</table>
## Maintaining Links and Folders

Access the Links page (in the workspace menu, click the Links link).

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select New Parent Folder</td>
<td>EPPCW_LKNEW_PRNT</td>
<td>Click the Select New Parent Folder button on the Link Properties page.</td>
<td>View a graphical display of the collection of folders and links defined for the Links module and select the folder in which you want the selected link to reside.</td>
</tr>
<tr>
<td>Folder Properties</td>
<td>EPPCW_LKFOLDER</td>
<td>• Click the Add Folder button on the Links page.</td>
<td>Add and maintain folders in the Links module.</td>
</tr>
<tr>
<td>• Click the Properties link for a folder on the Links page.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Links</td>
<td>EPPCW_LKCONTENT</td>
<td>Click the link for a folder on the Links page (EPPCW_LKBROWSE).</td>
<td>Add links to a folder. Access the link contents of a folder.</td>
</tr>
</tbody>
</table>

### Links page

The Links page displays links that were created in this workspace, including links created automatically by the system.

If the workspace was linked to or created from the Related Links related content service, then a folder with the name of the PeopleSoft application transaction page is created automatically and contains a link back to the transaction from which this workspace was linked or created. Alternatively, if the workspace was created from the Related Workspaces pagelet of Context Manager, then the Related Links folder is created automatically and contains a link back to the transaction from which this workspace was created.

**Add Link**

Click to access the Link Properties page.

**Add Folder**

Click to access the Folder Properties page.
### Search
Click to access the Search page.

### Top

**Title**
Click for a folder to access the Links page (EPPCW_LKCONTENT).
Click for a link to access the content of the link destination.

**Properties**
Click for a folder to access the Folder Properties page.
Click for a link to access the Link Properties page.

**Delete**
Click to delete a folder or link. You will be prompted to confirm the deletion.

### See Also


### Adding a Link
Access the Link Properties page (click the Add Link button on the Links page).
Link Properties page

**Label**

Enter the text that you want to appear as the link used to access the link content.

**Long Description**

Enter a long description of the link content, which will appear in the Description column on the Links page. This description will also appear as rollover text for the link on the Link pagelet.
Link Type

Select the link type:

- **External URL** — Select to add a link to an external URL. If selected, the URL field displays.

- **Menu Item** — Select to add a link to a PeopleSoft menu item. This establishes a link to a content reference in the portal registry. If selected, the Portal and Menu Item fields display.

- **Portal Blog** — Select to add a link to a portal blog post. Select the link on the Search Links page.

- **Portal Discussions** — Select to add a link to a discussion forum topic. Select the link on the Search Links page.

- **Workspace** — Select to add a link to a workspace. Select the link on the Search Links page.

URL

This field appears when the Link Type field is set to *External URL*. Enter the URL address of the website to which you want to create a link.

Portal

This field appears when the Link Type field is set to *Menu Item*. Select the portal in which the menu item for which you want to provide a link resides.

Menu Item

This field appears when the Link Type field is set to *Menu Item*. Select the menu item to which you want to provide a link.

Go to the Portal Registry Entry for this CREF

The field appears once link properties have been saved. Click to access the Content Ref Administration page for the menu item.


Additional Options

Use Contextual Data

Select to use contextual data defined in the workspace to derive link content.

For example, if you create a workspace that contains contextual data to a specific transaction or URL, a link to the transaction or URL will automatically be added to the Related Links folder on the Links pagelet for the workspace.

Map Key

Click to display the Key Name Mapping page, enabling you to select the keys passed to the link.

Display on Welcome Page

Select to display the link in the Links pagelet on the workspace homepage.

Open Link in New Window

Select to indicate that, when this link is accessed, you want the link content to appear in a new window. If this option is not selected, then when this link is accessed, the link content is displayed within your workspace frame.
**Location**

The Location group box appears once link properties have been saved. The fields in this group box enable you to change the location of an existing link.

**Select New Parent Folder**

Click to access the Select New Parent Folder page, where you can move the link to a folder other than the current folder.

**Parent Folder**

Displays the name of the parent folder of the link.

**Placement in Folder**

Select a value in the drop-down list box to change the placement of the link within its parent folder. Available placement values reflect saved link sequencing.

**Publishing Dates**

**Valid From**

Enter a date on which the link will be valid. This is the date on which the link appears on the Links pagelet on the workspace homepage. If you do not enter a value, the link appears when the data is saved.

**Valid To**

Enter a date on which the link ceases to be valid. This is the date on which the link no longer appears in the Links pagelet on the workspace homepage. If you do not enter a value, the link does not expire.

**Searching for a Link**

Access the Search Links page (click a Click to Search link on the Link Properties page).

**Search Links**

<table>
<thead>
<tr>
<th>Search</th>
<th>Link Type</th>
<th>Search</th>
<th>Search</th>
<th>Search</th>
<th>Search</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Search Links page**

Use the Search Links page to search for content as the link.

**Search**

Enter the search criteria.
Link Type  
Select the link type:
- Portal Blog — Select to search for portal blog posts.
- Portal Discussions — Select to search for discussion forum topics.
- Workspace — Select to search for workspaces.

Search  
Click to perform the search.

Search Results  
Click a link in the search results to select that item as the link destination.

Return  
Once a link is selected, click the Return button to return to the Link Properties page.

Mapping Keys for a Link  
Access the Key Name Mapping page (select the Map Keys link on the Link Properties page).

<table>
<thead>
<tr>
<th>Name:</th>
<th>Event Planner</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Available Workspace Keys</th>
<th>Key Name in Workspace</th>
<th>Key Name in Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select</td>
<td>Description</td>
<td>EO_PE_DEMO_DEPTID</td>
</tr>
<tr>
<td>✓</td>
<td>Department ID</td>
<td>EO_PE_DEMO_DEPTID</td>
</tr>
</tbody>
</table>

Select the keys that you want to pass to the link and provide optional new names for these keys.

Selecting a New Parent Folder for a Link  
Access the Select New Parent Folder page (click the Select New Parent Folder button on the Link Properties page).
Adding a Folder

Access the Folder Properties page (click the Add Folder button on the Links page).

Select New Parent Folder page

Navigate the link folder hierarchy to select a new parent folder.

Folder Properties page

Label
Enter the text that you want to appear as the folder name link used to access folder content.
**Long Description**

Enter a long description of the folder content, which will appear in the Description column on the Links page and as rollover text for the folder as it appears on the Links pagelet.

**Go to the Portal Registry Entry for this folder**

Click to access the Folder Administration page for the folder.


**Location**

**Placement**

Select a value in the drop-down list box to change the placement of the folder within the parent folder. Available placement values reflect saved folder sequencing. Placement options are not available for the Related Links folder.

**Publishing Dates**

**Valid From**

Enter the date on which you want the folder to be valid. This is the date on which the folder will appear on the Links pagelet on the workspace homepage. If you do not enter a value, the folder will appear when you save this page.

**Valid To**

Enter the date on which you want the folder to cease being valid. This is the date on which the folder will no longer appear on the Links pagelet on the workspace homepage. If you do not enter a value, the folder will appear indefinitely when you save this page.

**Accessing Folder Contents**

Access the Links page (click the link for a folder on the Links page).

---

**Links**

Click the folder Title to navigate through the folder levels. Click 'Properties' to access the folder or the content reference details.

<table>
<thead>
<tr>
<th>Add Link</th>
<th>Add Folder</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Related Links (1)</td>
<td></td>
</tr>
<tr>
<td>Equipment Vendors (0)</td>
<td>Links to equipment vendors we are considering.</td>
</tr>
<tr>
<td>Event Planner</td>
<td></td>
</tr>
</tbody>
</table>

Links page
The elements on this page are the same as the elements on the Links page, with the exception that this page allows only the addition of and access to links in folders in the Links module.

The Links module allows the addition of one level of folders and does not allow the nesting of folders within folders. Use the Links page to add a first-level folder.


**Working With the Links Pagelet**

Access the Links pagelet from the workspace homepage.

![Links](Image)

Links pagelet

Use the Links pagelet to access links added to the Links module. The Links pagelet displays links created in this workspace, including links created automatically by the system.

If the workspace was linked to or created from the Related Links related content service, then a folder with the name of the PeopleSoft application transaction page is created automatically and contains a link back to the transaction from which this workspace was linked or created.

<table>
<thead>
<tr>
<th>Links</th>
<th>Click a link in the Links column to open the link.</th>
</tr>
</thead>
<tbody>
<tr>
<td>View All Links</td>
<td>Click to access the top folder of the Links module.</td>
</tr>
</tbody>
</table>

**See Also**

*PeopleSoft Applications Portal 9.1 PeopleBook: Using Portal Features,* "Working With the Related Links Service," Creating and Using Links with the Related Links Service


---

**Using the Action Item Lists Module**

This section provides an overview of the Action Item Lists module and discusses how to use the Open Action Items pagelet.
Understanding the Action Item Lists Module

Use the Action Item Lists module to maintain action item lists and action items defining responsibilities for individual workspace members. Members can also monitor current action items using the Open Action Items pagelet, which appears on the workspace homepage.

Action items are assignments or tasks that are assigned to workspace members and require some sort of activity, monitoring, or event to take place before they can be considered complete. These action items are organized into groups called action item lists.” The list of action items appears in a flat view, with no nested hierarchy.

The pages used to manage lists and action items in the Action Item Lists module are the same pages used in the Action Item Lists feature that is available from the PeopleSoft Applications Portal homepage. When you click the Action Item Lists link in the workspace menu, you access the Action Item Lists page, which functions similarly to the My Action Item Lists page in the portal. The Action Item Lists feature is documented in the PeopleSoft Applications Portal 9.1 PeopleBook: Using Portal Features

See PeopleSoft Applications Portal 9.1 PeopleBook: Using Portal Features, ”Working With Action Items.”

Working With the Open Action Items Pagelet

Access the Open Action Items pagelet on the workspace homepage.

Open Action Items pagelet

Use the Open Action Items pagelet to review open action items in the Action Item Lists module. The pagelet also includes other convenient links for using the Action Item Lists module.

Action Item

Click a link in the Action Item column to view the Action Item Details page for that item.

View All Action Item Lists

Click to access the Action Item Lists page of the Action Item Lists module.

Using the Calendar Module

This section provides an overview of the Calendar module and discusses how to:

- Work with the Calendar pagelet.
- Work with the Upcoming Events pagelet.
Understanding the Calendar Module

Use the Calendar module to maintain and manage the workspace calendar and events to coordinate the activities of the workspace team. Workspace members can share, organize, and communicate about events that pertain to the workspace through the workspace calendar.

Using the Calendar module, you can:

- Schedule and display holidays.
- Synchronize events from holiday calendars to the workspace calendar.
- Specify weekends in the workspace calendar (in addition to the installation options).

Workspace members can also view calendar events in the Calendar pagelet and the Upcoming Events pagelet on the workspace homepage or in the full-page view in the Calendar module.

The pages used to manage the workspace calendar and events in the Calendar module are the same pages used in the Community Calendars feature that is available from the PeopleSoft Applications Portal homepage. When you click the Calendar link in the workspace menu, you access the Calendar page, which functions similarly to the Calendar page in the portal. The Community Calendars feature is documented in the PeopleSoft Applications Portal 9.1 PeopleBook: Using Portal Features.


Working With the Calendar Pagelet

Access the Calendar pagelet on the workspace homepage.

Use the Calendar pagelet to view events from the workspace calendar. The Calendar pagelet can also be configured to display your tasks as well as action items from the workspace's action item list. To update or modify the event, click the event in the pop-up list.

Click the Personalize Calendar icon to access the Personalize My Calendar Events page.

Click the Prev button to view the calendar for the previous period (day, week, or month).

Click the Next button to view the calendar for the next period (day, week, or month).

Move your mouse cursor over a date link to determine whether events are scheduled for that date; the date is highlighted in bold and a tool tip appears if events are scheduled for that date.

Click to display a pop-up list of events for that date. From the pop-up list, you can:

• Click an event link to access the View Event page for that event.

• Move your mouse cursor over Add Event to select the workspace calendar and then access the Event Details page to add an event.

Add Event

Click to access the Event Details page to add an event to the workspace calendar.

Full Page View

Click to access the full-page view of the Community Calendar page showing data from the workspace calendar.

**Personalizing the Calendar Pagelet**

Access the Personalize My Calendar Events page (click the Personalize Calendar icon in the Calendar pagelet).

You can customize the Calendar pagelet as follows:

• To display your tasks on the Calendar pagelet, select the Show My Task option.

• To display workspace action items on the Calendar pagelet, select an action item list.

• Select the period for the Calendar pagelet display: Daily, Weekly, or Monthly.

**Note.** By default, the workspace calendar is selected for display in the Calendar pagelet.

**Working with the Upcoming Events Pagelet**

Access the Upcoming Events pagelet on the workspace homepage.
Upcoming Events pagelet

Use the Upcoming Events pagelet to review upcoming events from the workspace calendar. The pagelet also includes other convenient links for using the Calendar module.

**Note.** Action items and tasks are not listed in the Upcoming Events pagelet.

<table>
<thead>
<tr>
<th>Event</th>
<th>Click a link in the Event column to display the event view page for that event.</th>
</tr>
</thead>
<tbody>
<tr>
<td>View All Events</td>
<td>Click to access the Calendar page of the Calendar module.</td>
</tr>
</tbody>
</table>

Using the Members Module

This section provides an overview of the Members module and discuss how to:

- View the list of members.
- View member profiles.
- Notify workspace members.

Understanding the Members Module

The Members module enables workspace members to learn more about who the other members participating in the workspace are. Much of this information about members is shared by way of member profiles, which should be made available for all members in a workspace.

Two types of member profiles are available that can be displayed for a workspace member. If the PeopleSoft Applications Portal Resource Finder feature has not been fully implemented or if it has been fully implemented but does not contain information for a member, the member profile will display data from the member's PeopleTools user profile (primarily from the PSOPRDEFN table).

If Resource Finder has been fully implemented, the Use Resource Finder for Profile Pages option has been selected on the Installation Options page, and Resource Finder data is available for the member, then the member profile is displayed by means of the Resource Finder participant profile.

The Members module also serves as a central point from which members can communicate with one another, providing easy access to email and instant messaging functionality. Email and instant messaging functionality is accessible from the member profile.
See Also

PeopleSoft Applications Portal 9.1 PeopleBook: Portal and Site Administration, "Setting Up Instant Messaging in PeopleSoft Applications Portal"

Pages Used in the Members Module

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Members</td>
<td>EPPCW_MBDIRECTORY</td>
<td>In the workspace menu, click the Members link.</td>
<td>View members of the workspace. Access member profiles, which you can use to communicate with members by way of email and instant messaging.</td>
</tr>
<tr>
<td>Member Profile</td>
<td>EPPCW_MBRPROFILE</td>
<td>In the workspace menu, click the Members link. Click the link for the member's name on the Members page.</td>
<td>View details about a member. Access email and instant messaging functionality that you can use to communicate with the member.</td>
</tr>
</tbody>
</table>
| Notify Members       | EPPCW_MBNOTIFY    | • Click the Notify All Members button on the Members page. This button is available if at least one member has email set up.  
• Click the email address for a member on the Members page. | Send an email message to selected or all members of the workspace.  |

Viewing the List of Members

Access the Members page (in the workspace menu, click the Members link).
Members page

Notify All Members
Click to access the Notify Members page, where you can send an email message to all members. This button is available if at least one member has email set up.

Member Administration
Click to access the Administration - Members page, where you can add and delete workspace members, as well as manage member privileges.

Search
Click to access the Search page, where you can perform a search within the Members module.

Instant Messaging Indicator
If applicable, an instant messaging indicator appears for a member. Click an indicator that indicates that the member is online to send an instant message to the member.

Member Name
Click a member name to access the member's profile.

Role
Displays a member's role if the member is included in a PeopleTools-based role that has been included as a member of the workspace.

Email Address
If applicable, the member's email address appears. Click the link to send an email to the member.
Privilege Set

Displays the privilege set that the member has been assigned in the workspace.


Viewing Member Profiles

Access the Member Profile page (in the workspace menu, click the Members link; then click a link for the member's name on the Members page).

**Vice President of Finance**

VP1

- **Email Address**: vpi@wzy.com

- **Send YAHOO Instant Message**: 😊 vpi

**User HR Data Attributes**

User HR Data Attributes Not Available

Use the Member Profile page to view details about a member and to access links to contact the member through email or instant messaging.

**Email Address**

If an email address is defined for this user, click the email address link to access the Notify Members page to send an email to this user.

**Send IM**

If an instant messenger ID is defined for this user, click the Send IM icon button to start an instant messenger session.

**User HR Data Attributes**

View assigned business attributes for this user.

Business attributes are defined and maintained by the portal administrator.

Edit My Profile

Click the Edit My Profile link to display the General Profile Information page, where you can update and edit your personal profile settings.


Edit My Instant Messaging Settings

Click the Edit My Instant Messaging Settings link to display the My Instant Messaging Information page, where you can update and edit your personal IM information.


Note. Member profiles generated using Resource Finder as its source display like Resource Finder participant profiles.

Notifying Workspace Members

Access the Notify Members page (click the Notify All Members button on the Members page).

<table>
<thead>
<tr>
<th>NOTIFY MEMBERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>A link to this Workspace will be included in the email message. Only members will be able to access the link.</td>
</tr>
<tr>
<td><strong>To:</strong></td>
</tr>
<tr>
<td><strong>Email</strong></td>
</tr>
<tr>
<td><strong>Subject:</strong> Notification - Workspace: 'Demo Wiki Workspace'</td>
</tr>
<tr>
<td><strong>Message:</strong></td>
</tr>
<tr>
<td><strong>Notify</strong></td>
</tr>
</tbody>
</table>

Notify Members page

Use the Notify Members page to compose and send an email message to workspace members. The To field is automatically populated with addresses for all members of the workspace who have defined an email address in their system profile.
Note. The email will contain a link to the workspace. Only members of the workspace will be able to access the workspace through the link.

To Enter additional email addresses for workspace members separated by commas.

Subject Enter a subject for the email.

Message Enter the message text for your email.

Notify Click to send the notification.

Using the Related Data Module

Access the Related Data module. (Click the Related Data link in the workspace menu.)

Related Data module

The Related Data module displays pagelets that have been selected on the Administration - Module page. This module can be used to display pagelets that are useful for the projects being worked on in the workspace.

See Also

Chapter 4, "Administering Collaborative Workspaces," Adding or Editing a Related Pagelet in a Workspace, page 81
Using the Related Discussions Pagelet

Access the Related Data module. (Click the Related Data link in the workspace menu.)

Use the Related Discussions pagelet to view and participate in related discussions that have been linked to the workspace. Related discussions are created and maintained on transaction pages through the Related Discussion related content service.


A related discussion can be linked to a workspace through the Related Links related content service.


Using the Polls Module

This section provides an overview of the Polls module and discusses how to use the Poll pagelet.

Understanding the Polls Module

The Polls module enables workspace administrators to create poll questions and review poll results. Polls are a simple way for you to gather opinions and comments from workspace members using the Poll pagelet that is displayed on the workspace homepage. The Poll pagelet displays a single question and enables users to submit a response and add comments. Until a workspace member has answered the current question, the pagelet displays the poll question only. After a member has responded, the pagelet displays the current poll results.

The pages used to manage the workspace poll in the Polls module are the same pages used in the Polls feature that is available from the PeopleSoft Applications Portal homepage. When a workspace administrator clicks the Polls link in the workspace menu, he or she accesses the Maintain Polls page, which functions similarly to the Maintain Polls page in the portal. The Polls feature is documented in the PeopleSoft Applications Portal 9.1 PeopleBook: Using Portal Features.

Using the Poll Pagelet

Access the Poll pagelet on the workspace homepage.

Poll pagelet (general workspace member before the poll question is answered)

Poll pagelet (workspace administrator after the poll question is answered)

Use the Poll pagelet to submit a response to the currently displayed poll question. After you have submitted a response, the pagelet displays the current poll results. If you are the workspace administrator, the pagelet also displays convenient links to help you maintain the poll and view complete results.

Response Choices

Select your response to this poll question from the available choices.
Using the Browse Workspaces Module

The Workspaces - Search page, Workspaces - Hierarchy page, and Browse By Category page that are available in the Browse Workspaces module of each workspace are the same pages as those available from the portal homepage.


Searching Within Workspaces

This section provides an overview of searching within workspaces and discusses how to:

- Search from the workspace header.
- Search within selected workspace modules.

Understanding Searching Within Workspaces

You can search for items within a workspace in one of two ways:
• Using the Search field in the workspace header.

When you use the Search field in the workspace header, your initial search scope is all modules within the workspace. The modules searched include:

• Action Item Lists
• Blogs
• Calendar
• Discussions
• Documents
• Links
• Members
• Wiki Content

• Using the Search link in selected workspace modules.

When you use the Search link in a selected workspace module, your initial search scope is that particular module. The following modules provide a Search link:

• Action Item Lists
• Blogs
• Calendar
• Discussions
• Documents
• Links
• Members

You build workspace search collections by running the Build Search Indexes Application Engine process (EO_PE_IBLDR) using the delivered PAPP_COLLABORATIVE_WORKSPACES run control ID.

See Also

PeopleSoft Applications Portal 9.1 PeopleBook: Portal and Site Administration, "Building Search Indexes," Building Search Indexes
## Pages Used to Search Within a Workspace

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
</table>
| Search Workspaces | EPPCW_SEARCH | • Enter the search string in the Search field and press Enter.  
• Enter the search string in the Search field and click the Search button. | Perform a search within all workspace modules. |
| Search Workspaces | EPPCW_SEARCH | • Click the Search link in the Action Item Lists module.  
• Click the Search link in the Blogs module.  
• Click the Search Blogs link in the Blogs pagelet.  
• Click the Search link in the Calendar module.  
• Click the Search link in the Discussions module.  
• Click the Search link in the Documents module.  
• Click the Search link in the Links module.  
• Click the Search link in the Members module. | Perform a search within the selected workspace module. |
| Search Tips | EO_PE_SRCH_TIPS | Click the Search Tips link on the Search Workspaces page. | Display search syntax and examples. |

### Searching from the Workspace Header

Access the Search field in the workspace header.

![Search field in the workspace header](image-url)
The Search field in the workspace header enables you to search all modules in the current workspace.

To perform a search from the workspace header:

1. Click the cursor in the Search field in the workspace header.
2. Enter the search criteria.
3. Press Enter. Alternatively, click the Search button adjacent to the Search field.

The Search Workspaces page appears displaying search results from all modules in the current workspace.

You can refine your results by selecting all workspaces, selecting specific workspace modules, or changing the search criteria.


**Searching Within Selected Workspace Modules**

Access the Search Workspaces page (click the Search link in a specific workspace module).

![Search Workspaces page](image)

Search Workspaces page

Use the Search Workspaces page to specify search criteria including search text, workspace scope (current or all), and modules to be searched.
| **Search Text** | Enter the search criteria. |
| **Search In** | *Current Workspace:* Select to search in the current workspace only. *All Workspaces:* Select to search in all workspaces of which you are a member. |
| **Module** | Select one or more modules in which to search. Available modules include: *Discussions* *Links* *Action Items* *Blogs* *Documents* *Members* *Events* *Wiki* |
| **Search** | Click to perform the search. |
| **Hide Summaries and Show Summaries** | Click to hide or show the summaries in the search results. |
| **Search Results** | Click a link to view that item. |
| **Return to <Module>** | If the search originated from a particular module, click to return to that module. |

**Viewing and Subscribing to Feeds Within a Workspace**

This section provides an overview of workspace feeds and lists the pages used to view and subscribe to feeds within a workspace.

**Understanding Workspace Feeds**

A PeopleSoft Applications Portal workspace has various types of content that is suitable for publication and consumption as feeds. Oracle has provided you with the tools within a workspace that facilitate the publication and consumption of this content as feeds.
Within a workspace, separate feeds can be published for each of three workspace modules—the Blogs module, the Discussions module, and the Documents module. The workspace administrator and certain other members with sufficient privileges can publish content from these three modules as a feed. Feed publication is documented in the *PeopleSoft Applications Portal 9.1 PeopleBook: Using Portal Features*


In addition, one or more feeds can be published for the entire workspace, each of which is known as a **workspace feed**. Only the workspace administrator can publish a workspace feed and is responsible for selecting which modules will be included in that feed. A workspace feed can be configured to include content from one or more of the following modules:

- Action Item Lists
- Blogs
- Calendar
- Discussions
- Documents
- Wiki Content

Publication of the workspace feed is covered within this PeopleBook.


As a consumer of feed data, you can find feed documents that are accessible in convenient locations across the workspace—in the workspace header, in specific pagelets on the workspace homepage, and on the pages that you use to manage and create specific workspace content. Use the Feed button, Feed link, and Open menu button to view feed documents for content published within the workspace.

**Feed**

Move the cursor over either of these icons to view the list of feeds published for this item. Click any list item to open that feed document.

Click the Feed button or Feed link to open the first feed document in the list.

**▼**

Move the cursor over this icon to view the list of feeds published for this item. Click any list item to open that feed document.

Click the Open menu button to toggle the list of feeds between frozen open and closed.

More information about viewing and subscribing to feeds can be found in the *PeopleSoft Applications Portal 9.1 PeopleBook: Using Portal Features*

Pages Used to View and Subscribe to Feeds Within a Workspace

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;Workspace Name&gt;</td>
<td>EPPBL_VIEW_POSTS</td>
<td>In the workspace menu, click the Blogs link.</td>
<td>Displays the feed for the Blogs module.</td>
</tr>
<tr>
<td>&lt;Workspace Name&gt;</td>
<td>EPPBL_VIEW_COMMENT</td>
<td>Click the link for a post or comment in the Blogs module.</td>
<td>Displays the feed for the Blogs module.</td>
</tr>
<tr>
<td>Discussions</td>
<td>EPPDF_FORUM</td>
<td>In the workspace menu, click the Discussions link.</td>
<td>Displays the feed for the Discussions module.</td>
</tr>
<tr>
<td>Post Details</td>
<td>EPPDF_VIEW_TOPIC</td>
<td>Click the link for a topic or reply in the Discussions module.</td>
<td>Displays the feed for the Discussions module.</td>
</tr>
<tr>
<td>Documents</td>
<td>EPPCM_HIER_MAIN</td>
<td>In the workspace menu, click the Documents link.</td>
<td>Displays the feed for the Documents module.</td>
</tr>
</tbody>
</table>

Creating and Using Tags in Workspaces

This section provides an overview of tags in workspaces and discusses how to use the Tags pagelet.

Understanding Tags in Workspaces

Similar to portals and sites, you can create and view tags for blogs, blog postings, discussion forum topics, and documents found within the workspace. In addition, you can create and view tags for the workspace itself.

In a workspace, the Tags pagelet enables you to view the tags for the workspace itself, create tags for the workspace itself, and view a tag cloud encompassing all public tags used within the workspace.

The page controls that are used to create and view tags for blogs, blog postings, discussion forum topics, and documents within a workspace are similar to the page controls that are used within a portal. In addition, the Search Tags page that is available in a workspace is similar to the Search Tags page that is available from the PeopleSoft Applications Portal homepage with an additional scope for the current workspace. These aspects of the tagging feature are documented in the PeopleSoft Applications Portal 9.1 PeopleBook: Using Portal Features

See PeopleSoft Applications Portal 9.1 PeopleBook: Using Portal Features, "Working With Tags."

Using the Tags Pagelet

This section discusses how to:
• View the workspace tag list.
• Create workspace tags.
• View the workspace tag cloud.

**Viewing the Workspace Tag List**

Access the Tags pagelet on the workspace homepage.

![Tags pagelet: List tab (view mode)](image)

Use the List tab of the Workspace pagelet to view the list of tags for the workspace itself.

- **Cloud** Select to view the tag cloud for all public tags that are used within the workspace.
- **Public** Select to view all public tags for the workspace itself.
- **Private** Select to view all of your private tags for the workspace itself.
- **Edit** Click the Edit button to edit your public or private tags for the workspace itself.
- **<tag>** Click a tag to go to the Search Tags page to view a list of items within the workspace that is tagged with that tag.
- **<#> users** Move the cursor over the number of users to view which users have tagged the workspace.

**Creating Workspace Tags**

Access the Tags pagelet on the workspace homepage; then click the Edit button.
Use the List tab of the Workspace pagelet to edit your tags for the workspace itself.

**Cloud**
Select to view the tag cloud for all public tags that are used within the workspace.

**Public**
Select to edit your public tags for the workspace itself.

**Private**
Select to edit your private tags for the workspace itself.

**<tag>**
Enter tags or tag phrases separated with a comma.

**<#> users**
Move the cursor over the number of users to view which users have tagged the workspace.

**Update**
Click the Update button to save your changes.

**Cancel**
Click the Cancel button to cancel any changes.

---

**Viewing the Workspace Tag Cloud**

Access the Cloud tab. (Select Cloud in the Tags pagelet.)
Use the Cloud tab to view the tag cloud of all public tags used within the workspace.

**List**

Select to view the list of tags for the workspace itself.

**<tag>**

Click a tag to go to the Search Tags page to view a list of items within the workspace tagged with that tag.

---

**Working with Additional Workspace Pagelets**

Additional pagelets are included with each workspace and can be added to the workspace homepage. These pagelets include:

- Email pagelet
- Feed Reader pagelet

**Working with the Email Pagelet**

The Email pagelet in workspaces is the same as the Email pagelet that can be added to the portal homepage.

See *PeopleSoft Applications Portal 9.1 PeopleBook: Using Portal Features*, "Using External Email, Calendar Data, and Instant Messaging," Working With the Email Pagelet.

**Working with the Feed Reader Pagelet**

The Feed Reader pagelet in workspaces is the same as the Feed Reader pagelet that can be added to the portal homepage.

Index

A

accessing
workspaces 99
Action Item Lists module
privileges 68
using 142
action items
pagelet 143, 144
using the Action Item Lists module 142
Add Category page 15
adding
workspace categories 15
adding links to content 118
Add Members (Optional) page 52
Add Pagelet page
templates 32
workspaces 81
administering
calendar module, privileges 69
calendar pagelet 144
calendar module, privileges 69
calendar pagelet 144, 145
using the Calendar module 143
category hierarchy
about 13
managing 14
child workspaces, about 43
Cloud tab 162
Collaborative Workspace Category Hierarchy page 14
collaborative workspaces See workspaces
comments, using the Blogs module 131
Compare Versions page (Wiki Content module) 125
comparing, versions of wiki content 125
configuring
advanced template options 41
workspace advanced options 89
Contextual Data page
administering contextual data for workspaces 85
defining template contextual data 35
Administration - Documents Module page 30
Administration - Advanced page
configuring advanced template options 41
configuring workspace advanced options 89
Administration - Contextual Data page
administering contextual data for workspaces 85
defining template contextual data 35
Administration - Documents Module Page 30
Administration - Feeds page 86
Administration - Members page
administering workspace members 75
selecting template members 26
Administration - Modules page
administering workspace modules 79
selecting template modules 28
Administration - Properties page
administering workspace properties 73
setting template properties 23
Administration - Security page 40
Administration module, privileges 70
Advanced Feed Options page (Workspace Feeds) 87

B

batch mode
creating workspaces 56
updating workspaces 56
Blogs module 131
privileges 68

C

Calendar module
using 143
Calendar module, privileges 69
Calendar pagelet 144
personalizing 145
calendars
pagelet 144, 145
using the Calendar module 143
category hierarchy
about 13
managing 14
child workspaces, about 43
Cloud tab 162
Collaborative Workspace Category Hierarchy page 14
collaborative workspaces See workspaces
comments, using the Blogs module 131
Compare Versions page (Wiki Content module) 125
comparing, versions of wiki content 125
configuring
advanced template options 41
workspace advanced options 89
calendar module, privileges 69
calendar pagelet 144, 145
using the Calendar module 143
contextual data
administering for workspaces 85
defining for templates 35
copying
changes from templates 38
Create Child Workspace page 55
Create User Account page 78
Create Workspace Template page 22
creating
child workspaces 55
root-level workspaces 45
templates 22
workspaces 43
workspaces in batch mode 56
workspace tags 161

data
administering contextual data for workspaces 85
defining contextual, templates 35
related data 151
defining
template contextual data 35
deleting
pagelets 92
versions of wiki content 125
dialog boxes, Link Info dialog box 118
discussions, using the Discussions module 127
Discussions module 127
Privileges 67
understanding 127
using 127
documents
defining module options 30, 80
using the Documents module 130
Documents module
Privileges 67
using 130
Documents Module Properties page 80

E

Edit Category page 15
editing
workspace categories 15
editing wiki content 116
Edit page (Wiki Content module) 116
Edit Pagelet page
templates 32
workspaces 81
Email Notifications page (Wiki Content module) 121
Email pagelet 163
events
pagelet 144, 145
using the Calendar module 143
exporting
template data 42
workspace data 97
external users 12

F

Feed Reader pagelet 163
feeds
publishing 159
subscribing to 159
understanding 158
viewing 159
workspace, administering 86
workspace, publishing 86
Folder Properties page 140
folders
accessing links 141
adding links folders 140
maintaining 134

H

hierarchies
category hierarchy 13
workspace, about 43
workspaces, browsing for workspaces 104
hierarchy
moving workspaces 96

I

importing
template data 42
workspace data 97
Information page (Wiki Content module) 124
Installation Options page 10
instant messaging
setting up 17

K

Key Name Mapping page 139
templates 29
workspaces 84

L

Link dialog box - Link Info tab 118
Link Properties page 135
links
accessing folder content 141
adding 135
adding folders 140
adding links to content 118
maintaining 134
mapping keys 139
searching for 138
selecting a new parent folder 139
Links module 133
Privileges 68
using 133
Links page 134, 141
Links pagelet 142

M

Manage External User Accounts page 97
Manage Templates page 20
Manage Workspaces page 95
managing
category hierarchy 14
external user accounts 97
templates 20
mapping
keys for links 139
Member Profile page 149
members
accessing 147
adding workspace members 52
administering workspace 75
notifying 150
viewing profiles 149
Members module 146
Privileges 69
using 146
Members page 147
Menu See workspace menu
Menu pagelet 3
modifying
workspace homepage content 90
workspace homepage layout 92
Module Details page 39
modules See workspace modules
  Action Item Lists module 142
  administering workspace modules 79
  Blogs module 131
  Browse Workspace module 154
  Calendar module 143
defining options 30, 80
  Discussions module 127
  Documents module 130
  Members module 146
  Polls module 152
  Related Data module 151
  searching within 157
  selecting template modules 28
  selecting workspace modules 50
  using the links module 133
Wiki Content module 114
moving
  pagelets 92, 94
  workspace categories 16
workspaces 75, 96
My Workspaces pagelet 101, 102

N
Name and Describe Workspace page 49
navigating to workspaces 99
notifying
  workspace members 150

O
Open Action Items pagelet 143
options
  setting up system options 9

P
pagelets
  Blogs pagelet 131
  Calendar pagelet 144
deleting 92
dragging and dropping 94
Email pagelet 163
Feed Reader pagelet 163
Links pagelet 142
mapping keys in templates 29, 84
Menu pagelet 3
moving 92, 94
My Workspaces pagelet 101, 102
Open Action Items pagelet 143
 Poll pagelet 153
Recent Discussions pagelet 128
Recent Documents pagelet 130
Related Discussions pagelet 152
selecting for templates 32
selecting for workspaces 81
Tags pagelet 160, 161
Upcoming Events pagelet 145
Wiki Content pagelet 126

pages
  Add Category page 15
  Add Members (Optional) page 52
  Add Pagelet page 32, 81
  Administration - Advanced page 41, 89
  Administration - Contextual Data page 35, 85
  Administration - Documents Module page 30
  Administration - Feeds page 86
  Administration - Members page 26, 75
  Administration - Modules page 28, 79
  Administration - Properties page 23, 73
  Administration - Security page 40
  Advanced Feed Options page (Workspace Feeds) 87
  Browse By Category page 106
  Collaborative Workspace Category
    Hierarchy page 14
  Compare Versions page (Wiki Content module) 125
  Create Child Workspace page 55
  Create User Account page 78
  Create Workspace Template page 22
  Documents Module Properties page 80
  Edit Category page 15
  Edit page (Wiki Content module) 116
  Edit Pagelet page 32, 81
  Email Notifications page (Wiki Content module) 121
  Folder Properties page 140
  Information page (Wiki Content module) 124
  Installation Options page 10
  Key Name Mapping page 29, 84, 139
  Link Properties page 135
  Links page 134, 141
  Manage External User Accounts page 97
  Manage Templates page 20
  Manage Workspaces page 95
  Member Profile page 149
  Members page 147
  Module Details page 39
  Name and Describe Workspace page 49
  Personalize My Calendar Events 145
  Personalize My Workspaces page 101
  Publish as Feed page (Workspace Feeds) 87
  Publish Feed Definition page (Workspace Feeds) 86
  Relate Workspace to a Transaction page 48
  Search Links page 138
  Search Tags page 160
  Search Workspaces page 157
  Select A Workspace Template page 47
  Select Branding Theme and Overrides page 24
  Select Category page 16
  Select New Parent Folder page 139
  Select Transaction page 37
  Select Workspace Modules page 50
  Tab Content page 90
  Tab Layout page 92
  View page (Wiki Content module) 123
  workspace homepage 90
  Workspace Invitation page 107
  Workspaces - Hierarchy page 104
  Workspaces - Search page 103
  Workspace Security Error page 108
PeopleBooks
about this xi
related, PeopleSoft Applications Portal xii
related, PeopleTools xiii
PeopleSoft Applications Portal
about ix
based on PeopleTools portal technology x
PeopleSoft Portal Solutions product family ix
PeopleSoft Pure Internet Architecture x
PeopleTools
portal technology x
Personalize My Calendar Events page 145
Personalize My Workspaces page 101
Poll pagelet 153
polls, using the Polls module 152
Polls module
privileges 70
understanding 152
using 152
posts, using the Blogs module 131
privileges
about 66
Action Item Lists module 68
Administration module 70
Blogs module 68
Browse Workspaces module 70
Calendar module 69
Discussions module 67
Documents module 67
Links module 68
Members module 69
Polls module 70
Related Data module 69
Welcome module 67
Wiki Content module 67
products
PeopleSoft Applications Portal ix
PeopleSoft Enterprise Internal Controls Enforcer x
PeopleSoft Portal Solutions product family ix
properties
administering workspace properties 73
setting template properties 23
Publish as Feed page (Workspace Feeds) 87
Publish Feed Definition page (Workspace Feeds) 86
publishing
feeds 159
workspace feeds 86

R
read-only status 75
Recent Discussions pagelet 128
Recent Documents pagelet 130
Related Data module
privileges 69
using 151
Related Discussions pagelet 152
related pagelets
selecting for templates 32
selecting for workspaces 81
Relate Workspace to a Transaction page 48
requesting access to workspaces 107
restoring versions of wiki content 125
reviewing version information for wiki content 124
revision control 115
root-level workspaces, about 43

S
Search field 156
searching
for workspaces 103
from the header 156
links 138
within selected modules 157
within workspaces 154
Search Links page 138
Search Tags page 160
Search Workspaces page 157
security
templates 40
Select A Workspace Template page 47
Select Branding Theme and Overrides page 24
Select Category page 16
selecting
parent folder for a key 139
template members 26
template modules 28
Select New Parent Folder page 139
Select Transaction page 37
Select Workspace Modules page 50
sending email notifications, wiki content 121
setting
workspace status to read-only 75
setting up
category hierarchy 14
instant messaging 17
workspaces 71
subscribing to feeds 159
system options
See options, setting up system options

T
Tab Content page 90
Tab Layout page 92
tag cloud 162
tagging, workspaces 160
tag list 161
tags
about 160
using the Tags pagelet 160
workspace tag cloud 162
workspace tag list 161
Tags pagelet 160, 161
Target tab
Link dialog box 120
tasks
pagelet 144
templates
about 17
configuring advanced options 41
copying changes from 38
creating 22
defining contextual data 35
Index

defining security 40
importing and exporting data 42
managing 20
mapping keys for pagelets 29
selecting a workspace template 47
selecting modules 28
selecting related pagelets 32
selecting template members 26
selecting transactions 37
setting properties 23
transactions
relating a workspace to 48
selecting a workspace template 37

U

Upcoming Events pagelet 145
updating workspaces in batch mode 56
users, external 12

V

viewing
feeds 159
wiki content 123, 126
workspace tag cloud 162
workspace tags 161
View page (Wiki Content module) 123

W

Welcome module, privileges 67
Welcome pagelet
comparison with the Wiki Content module 115
wiki content
adding links to content 118
comparing versions 125
deleting versions 125
editing 116
restoring versions 125
reviewing version information 124
sending email notifications 121
understanding revision control 115
viewing 123, 126
Wiki Content module
about 114
comparison with the Welcome pagelet 115
Wiki Content module, privileges 67
Wiki Content pagelet 126
workspace hierarchy
browsing 104
workspace homepage
about 2
content and layout 90
drag-and-drop 94
modifying the content 90
modifying the layout 92
modifying your 114
navigating in 109
Workspace Invitation page 107
workspace menu, understanding 3
workspace modules
See Also individual workspace modules
about 4
workspaces
about 1
accessing 99
adding categories 15
adding members 52
administering contextual data 85
administering feeds 86
administering members 75
administering modules 79
administering properties 73
administration, about 65
browsing by category 106
browsing the hierarchy 104
category hierarchy 13
child workspaces, about 43
configuring advanced options 89
copying changes from templates 38
creating 43
creating at the root level 45
creating child workspaces 55
creating in batch mode 56
creating tags 161
defining module options 30, 80
defining system options 9
editing categories 15
exporting workspace data 97
hierarchies 75
hierarchy, about 43
homepage, about 90
importing workspace data 97
inactivating and deleting 95
managing categories 14
managing external user accounts 97
mapping keys for pagelets 84
member privilege sets, about 66
modifying your homepage 114
moving 75, 96
moving a category 16
naming and describing 49
navigating in 109
navigating to 99
read-only status 75
relating to a transaction 48
requesting access 107
root-level workspaces, about 43
searching for 103
searching within 154
selecting modules 50
selecting related pagelets 81
selecting template transactions 37
setting status to read-only 75
setting up 71
setting up instant messaging 17
statuses, about 94
tagging 160
templates See templates
understanding feeds 158
understanding searching within 154
understanding setup 9
updating in batch mode 56
Workspaces - Hierarchy page 104
Workspaces - Search page 103
Workspace Security Error page 108
workspace setup, understanding 9